Marketing Committee

Tuesday, May 18, 2021
11:30pm – 12:30pm
Urban Affairs Coalition
ZOOM Video Conference

Agenda

I.	**Welcome** – Tina D'Orazio Gedgard & Lorina Marshall-Blake, Co-Chairs	**11:30P**
II.	**"What we do and how we do it," today** – Brandon Johnson	**11:35P**
III.	**Presentation & Discussion: Compass Consulting Final Report** – Compass Consulting	**11:45P**
IV.	**Adjournment** – Tina D'Orazio-Gedgard & Lorina Marshall Blake	**12:30P**

Notes from last meeting, 3/16/2021:

1. [See the full presentation](#).
2. *Updates to Committee* – Brandon shared updates on UAC.org and the UAC App
3. *UAC & Compass Project* – Compass provided their mid-term review presentation and let a discussion with the committee; UAC Marketing is one of three areas work closely with Compass
4. Post meeting, Brandon shared updates on the [Ending Racism Partnership](#)

Committee Members **Board Members		
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Strategic Alignment Final Presentation

May 5, 2021

Agenda

1. Introduction and Project Overview

2. Human Resources Team Findings and Recommendations

3. Marketing Team Findings and Recommendations

4. Program Services Team Findings and Recommendations

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Project Overview

The Compass team was tasked to assist the Urban Affairs Coalition in further developing their roadmap to aligning the organization with management's strategic objectives

Inputs

- Board and staff interviews
- Review of UAC's existing business processes
- Review UAC's existing Business Unit goals, objectives, and key performance indicators
- Review existing strategic priorities for UAC business units
- Review of organizational culture and values within Business Units

Data Analysis

- Analyze quantitative and qualitative data to assess current practices
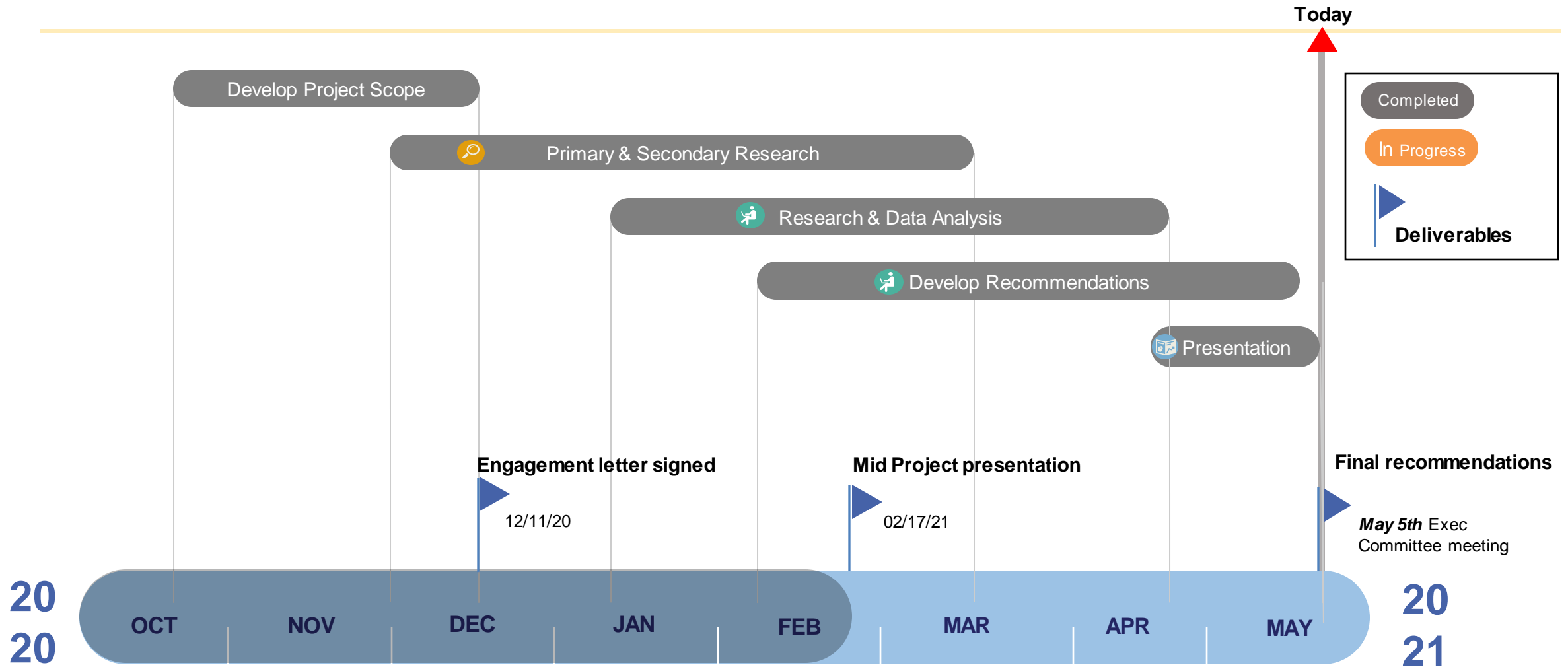- Apply and develop organizational strategy framework

Outputs

- Summary of findings
- Actionable recommendations for Business Unit leads to execute
- Project artifacts such as: process maps, written procedures, project plans, strategy framework documentation

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Project Timeline

Today

Develop Project Scope

Primary & Secondary Research

Research & Data Analysis

Develop Recommendations

Presentation

Completed	
In Progress	
Deliverables	

Engagement letter signed

12/11/20

Mid Project presentation

02/17/21

Final recommendations

May 5th Exec Committee meeting

20 20	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	20 21

Business Unit Focus

UAC management and the Compass team agreed to focus the project scope on the below functional areas within the group and assigned internal resources who own the execution of UAC strategy within these teams.

Human Resources	Sales & Program Services	Marketing
UAC Owner: Thembi Maiden	UAC Owner: Karen Harvey	UAC Owner: Brandon Johnson

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Compass Team Areas of Focus

1. Assist UAC teams in institutionalizing existing business processes

- Process Documentation Created
- Process Task Lists / Checklists created
- Task Owners clearly defined
- Processes mapped in Signavio
- Processes templates created in Workfront

3. Assist UAC teams to define key metrics for KPIs

- Key Performance Indicator (KPI) framework introduced
- First draft of KPIs defined

2. Assist UAC teams to optimize existing business processes

- Worked with teams to ideate improvements to processes with new steps

4. Assist UAC teams to define new processes, tools, and programs

- Program Partner Feedback / NPS
- Marketing Expanded Role
- HR Recruiting Tools Recommendation
- HR ATS Recommendation
- New Vetting Team recommendation
- New Onboarding Steps
- Beta Testing Workfront Processes

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MARKETING

Marketing: Current State Assessment I

o Currently focused on branding, external/market communications, public relations and internal communications with the qualitative objectives of:

- Increasing brand awareness
- Driving new business
- Retaining partners
- Retaining donors and funders (government and private)
- Optimizing social advocacy

o Has done and continues to do an outstanding job of utilizing mainstream social media to meaningfully extend UAC reach into target audiences and the general public

o The recently revamped UAC website is excellent

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Marketing: Current State Assessment II

o Current main activities are not considered "data driven"

- Performance is not measured against quantified KPIs whose achievement has positive linkage to overall UAC enterprise objectives
- Though there are broad quantitative indicators for most of the actively used communication channels (e.g., views on social media) they are not linked to any pre-established KPIs.

o Limited focus on traditional typical product/services marketing as defined by:

- *"The continuous identification and validation of customer and prospect needs followed by the development and implementation management of appropriately profitable ways to fulfill those needs better than competitors."*

Marketing: Recommended Next Steps For UAC I

1. Define target audiences and measure meaningful engagement response for all current UAC communication channels (or subchannel). Measure annually. (Target 8/1/21)

2. Define the minimum/appropriate level of these activities that is needed to maintain desired "front of mind" or other presence to capture prospective partners and donors and keep current partners and other stakeholders informed. Revisit annually. (Initial target 9/1/21)

3. Adopt and further define quantifiable KPIs for the main current UAC Marketing focus activities (Target 11/1/21):

   o Branding
   o External/market communications
   o Public relations
   o Internal communications

Marketing: Recommended Next Steps For UAC II

4. Develop and undertake annual surveys of partners, prospective partners, donors and other stakeholders to determine their perceptions and satisfaction with frequency and content of current UAC Marketing focus activities. (Target 1/1/22)

5. Commence implementation of Product/Services Marketing for both outbound and inbound marketing likely including the following: (Target transition start 10/1/21)

   o Utilize current/emerging definitions of UAC customer segments to develop a map of current services delivered to each partner and/or partner segment.
   o Develop, in cooperation with other parts of UAC, a services cost estimate model for each customized and generalized service offering by partner segment.
   o Analyze cost coverage/UAC margin for all current UAC partners.
   o Develop a comprehensive marketing plan with KPIs for each partner segment.
   o Create a partner ranking tool to evaluate current and prospective partners relative to overall attractiveness to UAC, financials. etc. Strongly consider partner needs vs. UAC reasonable deliverables and margin expectations.
   o Identify and attractiveness-rank a finite list of addressable prospective partners and thereafter develop and lead implementation of a customized approach to attract each one to partnering with UAC

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Marketing: Recommended Next Steps For UAC III

6. Establish margin targets on a partner or partner segment basis. Analyze quarterly or annually. Recommend pricing and/or support activities adjustment as appropriate thereafter. (target 1/1/22)

7. Create services offering/pricing guidelines to ensure that UAC revenues cover costs and expected margins on all partnerships on a going-forward basis. Consider strongly how to manage/standardize partner expectations of UAC deliverables on an ongoing basis. (target 1/1/22)

8. Create of a set of fixed or semi-customizable UAC service offerings with pricing guidance and/or a services offering checklist and pricing model for UAC Sales use with prospective partners. (target 1/1/22)

9. Conduct post-sale surveys at intervals (e.g., 6/12/18 months) to determine new partner satisfaction and provide input for possible corrective actions by UAC. (target 5/1/22)

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Marketing: Resource Recommendation

o Recruit/add services marketing expertise to UAC Marketing Board/Committee

o Staff Resources likely needed to be redeployed or added in order to begin the implementation of the UAC Marketing recommendations detailed above:

1. **Service Marketing Leader**(s) to lead initiative of all UAC customer segments

   - Ability to understand see the UAC "big picture"
   - Financial analysis understanding and capability
   - Ability to ascertain true customer "needs" versus "wants".
   - Strong personal interaction and negotiation skills.

2. **Survey Leader** to lead all UAC partner and other constituency survey initiatives

   - Strong survey development and measurement skills

3. **Product Analyst** to support development/maintenance of service/cost database

   - Strong services cost analysis modeling skills

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APPENDIX –
Supporting Details

Glossary of Terms

Glossary of Terms

Signavio - Software program used by UAC to document business processes and workflows.

Workfront - Software program used by UAC for project management and time tracking.

Key Performance Indicator (KPI) - a quantifiable measure used as a formal gauge of performance for individuals, teams, or the entire organization.

Net Promoter Score (NPS) - a metric used in customer experience programs. NPS measures the loyalty of customers to a company.

Applicant Tracking System (ATS) - a tool to support the Human Resources group in the execution of the recruiting process.

Executive Office (XO) - UAC's Executive Team.

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Key Performance Indicators (KPIs)

What are they?
A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively a nonprofit (or another type of organization) is achieving its key organizational objectives.

High Level KPIs:
High-level nonprofit KPIs may focus on the overall performance of the nonprofit

Low Level KPIs:
Low-level KPIs may focus on processes or employees in various departments of the nonprofit

KPIs can also be specific to certain organizational processes/areas. For example, marketing KPIs can include tracking social media statistics, while fundraising KPIs may look at the number of new donors in your database.

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Why are KPIs Important?

They're navigational instruments

KPIs provide the most important performance information that enables nonprofits to understand whether or not they are on track toward their stated objectives. This allows nonprofits to have a clear picture of where they're at

They help organizations adapt

Once nonprofits are able to assess where they are – with the help of KPIs – they can correct their course of action quickly and adapt to the changing conditions of the environment

They help organizations make decisions

KPIs are essential to making informed decisions. Once a nonprofit gathers relevant and sufficient data, it's much easier to make good decisions that are going to propel the organization in the right direction.

KPIs = Tool for UAC's Executive Office / Leadership

Reviewing KPIs quarterly (or more/less frequently depending the measure) allows UAC management to

- o Review a snapshot of organizational health throughout the year
- o Use leading indicators to see potential performance issues coming
- o Take action to avoid unwanted outcomes
- o Define tangible performance improvement targets for staff
- o <u>Goal</u> : All Critical Teams and Initiatives create / maintain KPI report for the executive office
- o <u>Timing</u> : To be Determined

Defining KPIs sets performance "goalposts"; team members will start gravitating towards them and moving them in their perceived "correct" direction

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Some UAC Teams Already have Metrics in Place

A few examples below , there are more…...

Audit and FInance	During Audit/Finance Committee Meetings	Kevin / Thomas Review: ● Financial Statements ● Financial Ratios ● Projections vs. Actuals
Marketing	During Marketing Committee Meeting	Brandon Reviews Annual Audit: ● Social Media Engagement Metrics ● Newsletter Subscribers

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Key Performance Areas Critical to UAC Management

UAC Team Leaders/Managers own *collecting data and reporting Executive Office*
- *Incentivizes them to get their processes in workfront/netsuite as it will make their lives easier to collect/track information*

Finance	Marketing / Communications	Human Resources	Fundraising

Program Services & Engagement	Digital Initiatives	Cultural Initiatives

Proposed KPIs UAC Can Continue or Start Tracking

Team/Initiative	Existing Metrics (that could become formal performance measures)	Newly Proposed KPIs
Fiscal/Financial	- Current Ratio - Quick Ratio - Cash Ratio - Working Capital - Debt to Equity Ratio - Debt Ratio - Program Services Expenses - Profit/Saving Indicator - Cash Expenses Per Day	See "Business Model Indicators" section of financial analysis report provided to UAC XO
Marketing/ Communications/ PR	- Newsletter Subscribers - Social Media Follower Growth - Social Media Audience Metrics - Social Media Engagement Spikes - Social Media Reach/ Engagement	- Video Views/Engagement - Website Traffic - Engagement Page Clicks - Conversions (how many people clicked on the page and completed a donation) - Email Open/Click Through Rate

Proposed KPIs UAC Can Continue or Start Tracking

Team/Initiative	Existing Metrics (that could become formal performance measures)	Newly Proposed KPIs
HR	Anecdotal information or informal measures	○ Employee Turnover rate ○ Early Employee Turnover Rate (1st year employees only) ○ Time to hire / time to fill ○ Average Applicant per position ○ % of employee making it through probationary period
Advancement	Advancement Report with below data points by category: ○ Goal ○ Pledged ○ Collection ○ Outstanding ○ Notes	○ Donor & Donation Growth ○ Donor Retention Rate ○ Fundraising ROI ○ Donations secured by channel

Proposed KPIs UAC Can Start or Continue Tracking

Team/Initiative	Existing Metrics (that could become formal performance measures)	Newly Proposed KPIs
PS&E	Anecdotal information or informal measures	○ Total Number of Programs ○ Number of New Programs ○ P/L on Programs ○ Program Growth Rate ○ NPS (when implemented)
Digital Transformation Initiative	Anecdotal information or informal measures	○ # of processes mapped in Signavio ○ # of processes live on Workfront ○ # of employees/team active on workfront ○ # of training sessions/information sessions or # of employees trained ○ # of communications to staff ○ Digital Adoption Surveys
Cultural Transformation Initiative	Anecdotal information or informal measures	○ Culture Survey (original baseline and then periodic benchmark)