



Marketing Plan - Strategy for 2021-2023

Our Objective

To increase overall brand awareness by advancing marketing tactics to enhance public relations and the visibility of our organization and our mission regarding paid services, volunteers, sponsors, and donors.

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Executive Summary

Our Organization

Silver Key is a 501(c)3 nonprofit organization located at 1625 South Murray Boulevard, Colorado Springs, CO 80916.

Silver Key's Mission

To serve in partnership with our stakeholders to support a healthy quality of life for seniors, allowing them to age safely with dignity and independence.

The Mission of Development

The Development team serves the larger Silver Key organization by acquiring, cultivating, stewarding, marketing, communicating, and engaging individual and corporate donors, foundations, private and government grantors, clients, as well as community partners for the purpose of extending the financial resources and enhancing and amplifying positive brand and community relationships.

Silver Key's Vision

The value, worth and needs of all seniors are identified and honored.

The Vision of Development

The Development team envisions ample resources, exemplary community relations, and brand recognition for the larger Silver Key organization so that it can fully carry out its mission to meet the needs of older adults.

Initiatives

- **Initiative 1: Private pay/social impact/social enterprise**
 - Reassurance+
 - Guardianship
 - Medical POA
 - Home Delivered Meals
 - Friends Thrift Store
 - Innovations

- **Initiative 2: Multi-modal (tech emphasis)**
 - Texting
 - Social media
 - E-news contact and distribution increase

- Web interface friendly
 - Video
 - Tailored / segmented messages depending on audience group
 - Radio
 - SEO improvement
 - Web ads
 - Use of and implementation of RE automated and other resources.
 - Direct mail pieces (polished, tailored, and increase targeted recipients [printed newsletter, etc.]
 - Story Sharing
 - Infographics
 - Exploration of an organization wide mobile app
- **Initiative 3: Legacy Giving**
 - Five Wishes
 - Silver Lining Alliance
 - For major donors and planned giving declarations
- **Initiative 4: Brand synonymous with: Quality, compassionate care for all** (people/incomes)- *"Your getting care, is our giving care"*
 - Support or receive (choose)
 - *"Aging is...All of Us!"*
 - Rally Cry – Our clients and services have great value and require appropriate resources to thrive!
- **Initiative 5: Sponsorships and Strategic Partnership agreements**
 - Insurance Companies
 - Various Living Facilities (independent, assisted, etc)
 - Focus on gaining new (sponsors), strengthening current relationships
 - Increase sponsorship (dollar metrics and total count)
- **Initiative 6: Targeted Audiences/Markets to gain Market Share**
 - Types of donors (major/mid/sustainer)
 - Faith Community
 - Volunteers who donate and Donors who become volunteers
 - Direct Health Care
 - Insurance Companies
 - Financial Companies
 - Younger engagement (engaged at every age)
- **Initiative 7: New Donor Acquisition and Current Donor Retention**
 - New donor welcome packet/process/procedure
 - Donor Survey
 - Ways to Give Document

- Training to provide team members with tools on in-person and digital engagement

Our Guiding Values:

- Respect for the value and quality of life of seniors
- Commitment to excellence, innovation, compassion, and respect in all we do
- Commitment to customer driven collaborative solutions to problems and effective community partnerships.
- Commitment to continual improvement of practices
- Identifying and implementing new, creative ways to serve seniors.

Silver Key is proud to serve thousands of seniors in the greater Pikes Peak region. We offer a variety of services for area seniors to maintain their independence, safety, and quality of life.

We honor, remember and celebrate each donor, volunteer, partner and advocate in the community who shares our mission to provide seniors with safety, independence and dignity as they move through the aging process.

Environmental Scan

Resource and Business Development

Resource and Business Development: The Development team focuses efforts on several different avenues for resource development. Primarily those areas include:

- Fundraising
- Generating awareness and excitement
- Cultivating community engagement
- Innovation incubator

Donor-centric emphasis is a guiding principle. It is another way of saying “building trust.” A donor’s relationship with your organization deepens or frays mostly based on how much trust you can create in three areas:

- Trust that donors play an essential, vital, central role in our mission’s success.
- Trust that our organization does worthwhile work with donor gifts.
- Trust that our organization conducts its operations efficiently.

Outcomes are achieved by cultivating long term relationships. There are at least 9 distinct funding streams and additional revenue generating opportunities that support the important work of our mission.

Funding categories include:

- Events (special)
- Fee for Service contracts
- Grants
- Mail Appeal/annual fund giving (SMD) – Direct Mail
- Major Gifts
- Other Contributions
- Planned Giving (Legacy)
- Self-Generating Resources (i.e. private pay, rents, Thrift Store)
- Sponsorships

It is critical to note that, “impact drives income, not the other way around.” The size and scope of our impact determines the size and scope of our income.

The role of the Marketing team is to assist Development and the organization in its entirety in efforts to cultivate, solicit, and steward these funding streams and other key initiatives. Marketing can be divided into four pillars:

- Branding
- Advertising/Sales
- Communications
- Education/Awareness

Pillar Definition

Branding: The shaping and defining of who, what, how, and why we do what we do. Pattern(s) of familiarity, meaning and association of our identity in all ways.

Advertising/Sales: Process by which a current or created need or want is promoted and messaged.

Communications: Imparting, conveying, and/or exchanging information for a given purpose and understanding. Can and should be done in a variety of forms and methods including written, verbal, non-verbal, and visual.

Education/Awareness: Knowledge, perception, and well-informed state of being. Process of giving and receiving information or enlightenment.

Each pillar is given appropriate attention and consideration within each strategic initiative.

Primary Marketing Group (Team)

Derek Wilson is Silver Key's Chief Strategy Officer. He oversees several departments and teams to include Marketing. He will oversee the implementation of the marketing strategy.

Dianne Reitan is Silver Key's Marketing Manager. She will spear head the implementation of this marketing strategy.

Allie Downing is Silver Key's Business Coordinator will support the department to include the Marketing team.

Secondary Marketing Group (Team)

Sean Dana is Silver Key's Senior Manager of Business & Donor Relations.

Roxanne Eflin is Silver Key's Senior Manager, Grants and Innovations

Jessica Arana is Silver Key's Events & Donor Relations Manager.

Current Climate

Fundraising Goals: Event & Sponsorships

Each year we have a marquee event. The event style has changed and evolved each time to match the current goals/needs. Event styles have included formal galas, friend-raising style lunches, and celebration for a cause themed fundraiser. In addition to our marquee event, we also have other events for cultivation and stewarding stakeholders including a major donor/sponsor mixer and V.I.P. Volunteer appreciation. Events offer the opportunity to generate interest/awareness, excitement, and attention along with potential revenue, volunteer, or in-kind resource generation. Each event attendee list is tailored for optimal results for our goals and objectives.

Silver Key has increasingly and aggressively pursued sponsorship as a foundational component of our fundraising plan. Sponsorship is closely tied to our marquee event. Currently, Silver Key has more than 30 sponsors, with several sponsors in each category (level). Each level is mapped out in an annually updated menu that is posted to our website under the corporate sponsorship heading. In the age of corporate responsibility and consumers asking about social impact, a focus on sponsorship has and will continue to be a significant contributing factor for our development goals.

Fundraising Goals: Sustained Member Drive (SMD)

Silver Key manages a Spring, Summer, Fall, and Winter Sustained Member Drive (SMD), annual giving. Each SMD mailer is designed with a theme and emotional appeal to entice our sustainable donors and new possible donors to make a generous contribution to a cause they care about. The SMD is expected to generate \$15,000 to \$17,000 quarterly; \$60,000 to \$65,000 annual.

- In order to increase donations, our list of potential contributors must evolve and grow as well as the marketing methods: themes, design, messaging.

- To accomplish this: the development and marketing areas work collaboratively to discuss, brainstorm, and deliver the most strategic and pivotal movements in the direction of successful, fresh SMD messaging.

Fundraising Goals: Various Campaigns

Silver Key has a set of full-range campaigns annually. Some are fixed themed while others are themed with the relevance of the time. Each campaign is strategically geared toward external audiences to gain both stakeholders and donations. Development and marketing work together to create a comprehensive strategy including digital and traditional, to advertise each campaign as effectively as possible. Some examples of annual campaigns:

- EOY (end of year) Campaign
- Share the Love
- Bountiful Bags
- March for Meals - Champions
- Various smaller campaigns (ad hoc)

Current Marketing Structure

Regular strategies currently embodied by the marketing team:

- Daily social media posts
- Ads in local papers and digital platforms
- Videos on YouTube
- Regular e-news and printed newsletters
- Keeping a contemporary website
- Area collateral print pieces
- And much more

Marketing Tools & Resources

Our marketing team is consistently mindful of the latest trends and tech enabling new ideas and tools to execute our initiatives. Our most heavily used programs, software and websites are as follows:

Digital:

Hootsuite: a platform that allows the marketing team to instantly upload a post to all social media channels and platforms simultaneously. Hootsuite also allows posts to be scheduled ahead of time, to allow for a social media/marketing strategy.

Website/WordPress: this is the processor we use to digitally communicate with external audiences through our website.

Adobe Creative Suite

- Illustrator
- InDesign
- Photoshop, etc.

Free online images

- Pexels
- Unsplash
- Adobe stock

Paid Subscriptions

- iStock
- Shutterstock
- Yelp
- Google Ads

Communication Tools

- Flash Alert
- Constant Contact
- SendGrid, Zutech
- Zoom

Partners/Vendors:

Colepromo

- Promotional items
- Collateral

Signorama

- Vehicle wraps
- On-campus Signage.

The City Printer

- All printed direct mailers
- Collateral
- Flyers
- Rack cards
- Various others

Threats and Opportunity Analysis

SWOT Analysis

It is critical to our mission that the Silver Key brand leans into what it does well, improves what it does not, capitalizes on what it can do, and defend against what could challenge the organization. SWOT analysis for 2021:

Strengths	Weaknesses	Opportunities	Threats
<p>50+ year history, good reputation for helping low-income seniors.</p> <p>Known for selling medical equipment, Reserve & Ride.</p>	<p>Known for only helping low-income seniors of the community.</p> <p>Thrift Store location is generally not considered "the best part of town," away from city growth and no signage.</p>	<p>Re-branding, "We support all seniors across all income levels."</p> <p>Through visual storytelling, convey that financially stable seniors can help themselves and financially unstable seniors at the same time.</p> <p>"Your receiving care is our giving care."</p>	<p>Population explosion could mean more competitors offering services that compete with SK.</p> <p>Example: Pikes Peak Hospice used to be one of the few organizations in town in that service sector; now there are dozens.</p> <p>Also, trying to be all things to all people and, due to limited resources, becoming only mediocre across all services as a result.</p>

Strengths	Weaknesses	Opportunities	Threats
<p>Team</p> <p>Creative</p> <p>Brand-Integrity</p> <p>Legacy – 50 years</p> <p>*Spectrum of market and services</p>	<p>Consistency of message</p> <p>Tyranny of Urgent/panic</p> <p>Timetables too fast – we don't allow things to mature</p> <p>Design by committee</p> <p>11th hour changes</p> <p>Need to/for explanation of things (frequently)</p> <p>*Spectrum of market and services</p> <p>*Brand-all income levels</p>	<p>Younger Engaged</p> <p>Faith Community</p> <p>Social Audience increase</p> <p>Board usage/engagement</p> <p>Tap into VIP's more</p> <p>Financial firms</p> <p>Insurance companies/brokers</p> <p>Healthcare (direct care)</p> <p>Texting more</p> <p>Segmenting messages and donor types</p> <p>Improved Story telling (people/purist approach)</p> <p>*Brand-All income levels</p>	<p>PACE</p> <p>Innovage</p> <p>Project Angel Heart</p> <p>GoodWheels/Goodwill</p> <p>Diversus</p> <p>Bros Redevelopment. (Bros)</p> <p>Envida</p> <p>Home Health Sector</p> <p>Resource Limits</p> <p>Brand-view of only helping the poor and/or everything is "free"</p> <p>Lack of focus areas/topics</p> <p>One sided collaboration(s)</p> <p>Difference of views in the direction to "go-in" – internal disagreements as to the best/right/most appropriate way forward</p>

**Indicates comment is in multiple categories*

Defined Marketing Modes

Digital

The focus of our online presence is a top priority. Research supports that in an ever-changing world, digital marketing is increasingly more pertinent than any other form of marketing, to include its popularity with the senior community. Our use of digital media:

- *Silver Key's Website*
- *Google Ads*
- *Social Media (boosting): Facebook, Instagram, LinkedIn, Twitter*
- *Use of Videos: YouTube*
- *Publications: digital ads, i.e. Colorado Springs Business Journal, etc.*

Print (Collateral)

Silver Key has a strong presence in the community, and when attending expos, networking events or any other community engagement activity, we strive to handout quality branded professional materials.

- *Primary (main) Brochure*
- *Rack Cards*
- *Flyers*
- *Folders*
- *Various others*

Direct Mailers

Development uses direct mailing as a strategy for making touchpoints to raise awareness and dollars. To-date this is the most effective solicitation. Annually, roughly 13 touch points are made with stakeholders through our direct mailing schedule.

- SMD: Sustained Member Drive- is our direct ask for donations and reaching a broad audience.
- Our printed newsletter is to inform all our stakeholders, which also reaches a broad audience.
- Post cards, holiday cards and invitations are specialized and geared toward very specific demographics.

Direct Mail Schedule

- *Jan: No Mail*
- **Feb: SMD** + Valentine's day card
- *Mar: Newsletter*
- *Apr: Save the Date**
- **May: SMD**
- *June: Invitation + Newsletter*
- *Jul: No Mail*
- **Aug: SMD** (Event-Fundraiser)*
- *Sep: Newsletter*
- *Oct: Annual Report*
- **Nov: SMD**
- *Dec: Newsletter + Holiday Card*

Ads in Local Publications

In order to increase community awareness, we post ads in various publications to raise brand awareness, knowledge and info regarding our programs and services as well as (specifically) our private pay services. Some of the publications we work with are:

- *Life After 50 (also digital)*
- *Beacon News Group*
- *Springs Relocation Guides (also digital)*
- *Senior Beacon*
- *Pikes Peak Newspapers*
- *The Senior Beat*
- *Our Community News (OCN)*
- *The Independent (The INDY) (also digital)*
- *COS Business Journal (Digital only)*
- *The South East Express (also digital)*
- *The Military Papers (x3 – Ft Carson, Peterson AFB and Schriever AFB)*
- *Gazette*
- *Cheyenne Edition*
- *Various Others*

Campaigns

Marketing supports the development team in their execution of multiple fundraising campaigns. Some campaigns are specifically aimed at receiving donated items, or publicity/ brand awareness, but both teams strategize how to raise money regarding all campaigns Silver Key participates in. Current campaigns are:

- *Empty Stocking Fund*
- *Marquee Event promotion*
- *Bountiful Bags*
- *End of the Year Campaign*
- *Share the Love Event*
- *Giving Tuesday/Colorado Gives Day*
- *March for Meals/Champions Week*
- *and More!*

Branding

In efforts to increase brand awareness, we put Silver Key's services, logo and "brand" out, forward facing to the public in a variety of ways. Positive brand association is important because it is how we keep our reputation, mission, and "brand" synonymous with our values, mission, and vision. We use digital marketing, collateral, signage, mailers, vehicles wraps, branded materials, and other schwag to command attention, respect, and awareness of our brand- what Silver Key stands for- our reputation and our essence.

Brand Distinctives – Why is Silver Key Uniquely Distinct?

- Local provider for *expert* client-centered compassionate care for older adults
- Operate and sustain both pro-bono and private pay services
- Volunteers remain the heart of how we are able to "scale-up" services
- The trusted source for "all things seniors" in the Pikes Peak region
- Heritage and Legacy organization providing in a way that government doesn't and can't

Branded Vehicles

Being that Silver Key has the benefit of helping clients on the road, we strive to keep all vehicles up to date with our branded content as they are -for all intents and purposes- a traveling billboard seen by the community that advertises not only our transportation service, and our other services as well.

Branded Gear

Branded apparel is worn by staff, and volunteers. Because our volunteers are hands-on and forward facing in our community, we can increase our brand awareness and convey Silver Key's true essence, while our team acts and displays the mission of Silver Key. We encourage both staff and volunteers to wear their shirts, jackets, hats, and lanyards whenever they are out in the community, as this

will aid in increasing both morale (internally) and community engagement (externally).

- **Branded Items**

- *Campus signs*
- *Event Signage*
- *Vehicle wraps*
- *Schwag*
 - *Pens*
 - *Chip clips*
 - *Folders*
 - *Bags*
 - *Various wearables (T-shirts, jackets, hats, vests, etc)*
 - *Lanyards*

Peer to Peer & Networking

Peer to peer marketing is especially important to the development team, as it is the primary job of all development team members to build and cultivate relationships (particularly in person when possible.) Our brand is represented by word of mouth cultivating professional relationships. In this capacity it is important to make sure that all members (staff and volunteers) of Silver Key represent the brand correctly and effectively when out in the community and networking with potential sponsors, donors, and stakeholders. *Examples of this are:*

- *Networking events*
- *On-campus tours with stakeholders*
- *Fundraisers*
- *Expos*
- *Educational opportunities*
- *Community engagement*
- *Presentations*
- *Galas, Luncheons, Breakfasts, Award shows*
- *Special community projects (wreath competition)*

Marketing Channels

Focus is given to the following channels for educating our clients and stakeholders, generating leads, and developing brand awareness. The digital space is currently marketing's most valuable mode of exposure because it reaches all ranges of our demographic in the most cost-effective way, but also the most immediate and user-friendly way available.

Each social platform that Silver Key uses has been strategically chosen and is strategically used. Posts are published to appropriate corresponding channels that will gain traction with the targeted audience. We use the analytics of Hoosuite to gauge appropriate measures and marketing tactics (video, links, ads, education, etc.)

Facebook: this platform is the most heavily used among our demographic and allows for the most interaction with our community. We can reach specifically targeted age groups, locations, genders and individual interests with interactive fundraisers, videos, posts, advertisements, invitations, etc.

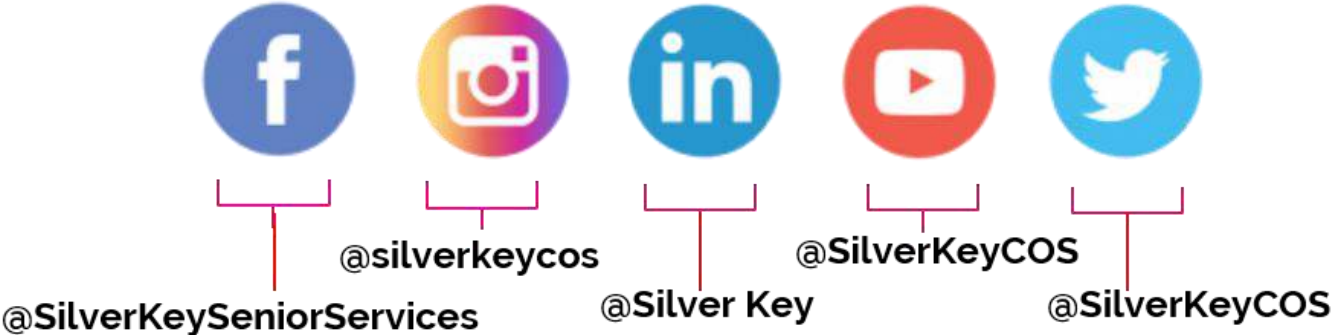
Instagram: allows us to do the same thing as Facebook, however is not as heavily used by our audiences. The functions on Instagram are limited compared to Facebook but younger audiences are reachable.

LinkedIn: is how we engage, primarily, with our professional community and stakeholders. Potential community partners and sponsors are developed on this platform.

YouTube: allows us to message an emotional appeal to audiences, Video is well received more with an ever-changing landscape online; the attention span of users diminishes more with time and video is a great way to message heartfelt appeals quickly.

Twitter: this is our least used platform by our clients and targeted demographic. With time, this platform will become increasingly more relevant as generational diffusion and fluctuation occurs.

The ultimate purpose of these channels is to inform the community at large regarding all things Silver Key. These (currently) low-cost platforms are intended for connection, visibility, and transparency to build a rapport and inform all our external audiences. The identified marketing initiatives are emphasized in the use of these digital marketing channels:



Marketing Initiatives: Market and Channels

A robust marketing plan and brand strategy is vital as the need for brand awareness and community support and/or participation intensifies day by day. It is imperative to spend time researching, defining, and promoting our brand; then marketing that brand in such a way as to multiply exponentially the organization's efforts.

The need to stay relevant and up to date regarding effective marketing tactics is imperative and will require a strong focus on specific initiatives and well-developed action items. This means continuing the education and collaboration within the marketing and development department to enhance each component of Marketing's goals and initiatives.

Each one of the seven initiatives identified below surfaced while brainstorming Silver Key's priority pillars and isolated which components within the organization needed the most attention and would be most necessary for growth. The ultimate goal of the marketing strategy is to increase awareness of services that transform and positively impact lives within our community and thereby generate awareness, engagement, and funds for the entirety of the organization.

**This is a living document and is not intended to be exhaustive. Note that the following initiatives are numbered. This numbering is solely for convenience in identifying the initiatives. It does not imply order of importance.*

Initiative 1: Private pay/social impact/social enterprise

Private pay and social impact business initiatives are designed to increase the use and resources of our paid services. These endeavors are part of our *playbook* to facilitate our ability to establish a sustainable business model, and thereby serve more people—those privately paying as well as those receiving pro-bono services. To be effective, two primary messages require ongoing community mental reset. The first is that services are not “free.” All services require funding and a funder. Those that benefit from funded services do so as a result of diverse funding streams. The second is that we provide quality senior services to **all** seniors. Quality of care is not dependent on income, and we provide and make those services

available to all either through private pay offerings, or through subsidized funding mechanisms. Currently, the programs of focus for this initiative are:

- *Reassurance+*
- *Guardianship*
- *Medical Power of Attorney*
- *Home Delivered Meals*
- *Silver Key Friends Thrift Store.*
- *New Innovations (new and upcoming services and projects)*

Action items for implementation

- **Digital:**
 - By keeping our main webpage current and up to date, mobile accessible and user friendly, we will disseminate imperative information regarding all focus programs to keep our clients well-informed on all current and relatable details regarding all paid services and programs.
 - Regular social media posts on all platforms and digital ads will not only help to inform potential "customers" but to also gain momentum regarding the purchase of our paid services through emotional and logical appeal.
- **Print (Collateral):** For many, print collateral will continue to be the preferred channel of connection. Similar information as the digital format will be available for those individuals in print form: up-to-date current and relevant information in easy-to-read, design savvy layout that can be passed out on campus or external functions and used for awareness and reference.
 - *Examples of this collateral: Brochure, rack-cards, flyers, etc.*
- **Direct Mailers:** By including a feature or "blurb" of our paid services in all mailed material, we can ensure that those who are not utilizing our digital resources are still being directly informed and contacted by us while not feeling overly solicited.
 - *e.g. small "highlight" features in: the quarterly SMD's and quarterly Newsletters*
- **Campaign:** Silver Key has several annual – reoccurring campaigns that can all extend their set themes to include messaging regarding paid services.

- *e.g. The EOY campaign, regardless of theme, and interweave the messaging around at least one of the paid services methods.*
- *e.g.: The March for Meals campaign can subtly message our Home Delivered Meals option*
- **Branded Items:** Branded items are all things tangible and or seen by our external audiences on a mass scale: e.g. Signage, vehicle wraps, schwag, etc. By ordering materials that are specifically branded for a paid service, we will increase advertising power and grow this portion of our organization and enhance the revenue for each individual area isolated sustainability. Additionally, our name and services will be further synonymous with quality
 - *e.g.: our current vehicle wraps for the thrift store, HDM, etc. serve as mobile billboards*
 - *e.g.: possible branding of Silver Key Reassurance+ pens, bags, apparel, etc.*
- **Ads in Local Publications:** this traditional method for advertising remains a strong tool, as most of our paid ads in the contracted publications around town appear frequently and in their regular distributions. We feature almost 60% of our monetized advertising power behind our paid services exclusively.
 - *Examples of these ad publications are: Life after 50, Senior Beacon, the Indy, South Easy Express, COS Business Journal, etc.*

Metrics & Expected Outcomes:

- Increase awareness regarding what our paid services are and how to utilize them.
- Increase in brand awareness and education regarding Silver Key as an organization and what we do, our reputation and our brand identity
- Shift community paradigm of who we serve and how we serve
 - All seniors regardless of income
 - Private pay and insurance options
- Focus on the conscientious consumer
- Ensure that we are operating with quality and effectively utilizing our resources and ensuring our ROI

Initiative 2 Multi-modal (tech emphasis)

The focus of a multi-modal communication strategy with a technology emphasis will allow for all development and marketing endeavors to be best positioned for success. This increase in the use and implementation of technology to enhance Silver Key's mass communication efforts and to utilize dollars more strategically, enables for further effective broad reach. As a result, our marketing methods will be more cost effective, contemporary, easier to use and timely. Areas of focus for this initiative include:

- *Texting*
- *Social media and e-news audience increase (ads also)*
- *Web interface friendly*
- *Video-Tailored / segmented messages depending on audience group*
- *Radio*
- *SEO improvement*
- *Web ads*
- *Use of and implementation of RE automated and other resources*
- *Direct mail pieces (polished, tailored, and increase number of folks (printed newsletter, etc)), Story Sharing Infographics.*
- *Exploration of an organization wide mobile app*

This multi-modal communication with technology emphasis will facilitate messaging that is ongoing, timely, accurate, and as is necessary, available to all.

Action items for implementation

- **Technology (advanced)**
 - Fundraising events: texting and app features
 - RSVP's
 - Check-in
 - Silent Auction
 - Virtual participation
 - Follow up appreciation
 - Text blasts
 - Text to give
 - Use of Zutech text system
 - Campaigns
 - QR Code for web info

- Text in updates (bountiful bags info on website)
- **Digital**
 - Website – mobile friendly
 - Constant Contact email blasts
 - Use of video invites, check-ins, and thank you's
 - SEO improvement
 - *e.g. when searching for home care our companionship services are found*
 - Use of social media to advertise and inform our use of technology (i.e.)
- **Print (Collateral)**
 - Reference digital and tech
 - High tech and high touch connection
- **Direct Mailers**
 - Disseminate information.
- **Campaign**
 - Text to give.
- **Ads in Local Publications**
 - Disseminate information

Metrics & Expected Outcomes:

- Regular dissemination of accurate communication
- Ability to work “smarter” vs “harder”
- Increased timely messaging
- Larger outreach to broad audience
- Increase use of advanced tech regarding our fundraising efforts,
- Increase awareness of our tech options
- Tech options are user friendly, advertised well
- Increase in donations and program awareness (events, campaigns, services)

Initiative 3: Legacy Giving

Legacy Giving, also referred to as planned giving, is a way for individuals to support our organization by making larger gifts than they could make from ordinary income. Gift plans use estate and tax planning to provide for charity and heirs in ways that maximize the gift and/or minimize its impact on the donor's estate. Thus, by definition, a planned gift is any major gift, made in lifetime or (typically) at death as part of a donor's overall financial and/or estate planning.

It is intended that our current planned giving program be promoted more for the purpose of enhancing and amplifying potential donor resources that are currently being only modestly tapped into. Many donors are not aware of this option, and those that are aware usually are not advised on how they can leave Silver Key in their estate plans. We have made great strides to this effort with the addition of tools such as:

- Five Wishes connection with legacy giving
- Updated website with language and walkthroughs
- Celebration of Declaration document
- Advent of the Silver Lining Alliance (legacy giving society)

The specific focus of this initiative is to further expand and promote this giving mechanism. A big part of this is the creation and promotion of the Silver Lining Alliance. This group is an *exclusive* legacy giving society intended to honor those who are passionate about helping seniors through substantial giving and leaving behind a legacy that will be long lasting.

Action items for implementation

- **Digital**
 - By keeping our main webpage current and up to date, mobile accessible and user friendly, we will disseminate imperative information regarding planned giving to keep our clients current on relatable details regarding the benefits of planned giving and our legacy giving Society
 - Regular social media posts on all platforms and digital ads will not only help to inform potential "donors" but to also gain momentum regarding our planned giving / Silver Lining Alliance legacy giving society - through emotional and logical appeal.

- Five Wishes online is a great way to reference people to the website, have them fill out their Five Wishes, and then open the discussion about how we can help them achieve their philanthropic goals.
- Creation of videos promoting and explaining the Five Wishes document and opportunities to participate in planning sessions
- **Print (Collateral):** For many, print collateral will continue to be the preferred channel of connection. Similar information as the digital format will be available for those individuals in print form: up-to-date current and relevant information in easy-to-read, design savvy layout that can be passed out on campus or external functions and used for awareness and reference. In partnership with the Five Wishes organization, we have developed a user-friendly printed packet (which is the same as the content on the web), which is an official document that only needs to be notarized and put on file with a health care professional.
 - The Five Wishes packet is a great way to start the conversation and open the discussion about how a person may want to be remembered, and to help them achieve their philanthropic goals.
- **Direct Mailers:** By including a feature or “blurb” of Five Wishes and planned giving in all mailed material, we can ensure that those who are not utilizing our digital resources are still being directly informed and contacted by us while not feeling overly solicited. SMD's are already geared toward mission invested sustainable donors, therefore mention of our Silver Lining Alliance might be of particular interest to this group of donors
 - *i.e. small “highlight” features in: the quarterly SMD's and quarterly Newsletters*
 - *All SMD's asking the question(s) if they have left Silver Key in their legacy planning, or would like to learn how to*
- **Campaign:** Silver Key has several annual reoccurring campaigns that can all extend their set themes to include messaging regarding our legacy giving society and the importance of planned giving for Silver Key's sustainability.
 - *e.g.: The EOY campaign, regardless of theme, and interweave the messaging around planned giving*
 - *e.g. The March for Meals campaign can stress the importance of planned giving with our Silver Key Champion donors*

- **Branded Items:** Branded items are all things tangible and or seen by our external audiences on a mass scale: e.g. (signage, vehicle wraps, schwag, etc.) By ordering materials that are specifically branded for Five Wishes, we will increase advertising power around the Five Wishes discussion which will lead/grow our Legacy Giving Society
 - *e.g.: our current vehicle wraps for Five Wishes*

- **Ads in Local Publications:** this traditional method for advertising remains a strong tool, as most of our paid ads in the contracted publications we have around town and appear in their frequent and regular distributions, feature Five Wishes as one of our highlighted services/programs in hopes to gain traction with the community at large. Again, if we can have the advanced care conversation, we can have a discussion around “whole person” care and what their long-term goals might be.
 - *Examples of these ad publications are: Life after 50, Senior Beacon, the Indy, South Easy Express, COS Business Journal, etc.*
 - *Several of these publications are viewed by clients as well as professionals in the community – potential stake holder & sustainable donors (many are in the senior space and passionate about what we do for seniors)*

Metrics & Expected Outcomes:

- Robustly promoted and increase awareness and participation in our legacy giving/society
- Increase in brand awareness and education regarding planned giving and our legacy giving society
- Ensure that we are operating with quality and effectively utilizing our resources and ensuring our ROI
- Planned giving program greatly enhanced and expanded upon
- Generate additional revenue
- Grow the Silver Key Foundation endowment

Initiative 4: Our Brand is: quality and compassionate care for all

Our brand goal is to ensure that when the Silver Key logo is seen or the organization is mentioned, people think of: quality and compassion of care for **all** older adults across **all** socio-economic levels. We want the message to be "your getting care, is our 'giving' care."

This statement conveys that by choosing Silver Key to be your service provider you enable us to serve others who could not otherwise afford these vital resources themselves. 100% of everything above running these quality services goes to supporting older adults in need. To the financially challenged it says that's what we do--we provide care to those in need. Now come and receive! To the family with means it says if you need *a specific* service of care and when you choose us (experts, quality, heritage, etc.) you also enable/empower us to give care (to those without resource).

Our main focus and efforts will be geared toward the following messages and themes:

- "Aging is...All of Us"
- Our clients and services have great value and require appropriate resources to thrive.
- We are engaged at every age
- "Your getting care, is our giving care"
- Think of it as "caring for you, like family"
- We provide expert quality compassionate care
- Eat Good, Do Good
- Delivering Reassurance
- Your income should not dictate your level of care
 - Serving seniors across all income levels

Action items for implementation

- Digital
- Print (Collateral)
- Direct Mailers
- Campaign
- Branded Items
- Ads in Local Publications

- **Digital**

- Messaging around services is key for the execution of this initiative. By strategically developing appropriate content we can message the value of our service and that they require resources to thrive. This kind of messaging should be prominent on the main website, as well as reminding the community that using Silver Key services instead of our competitor's, benefits lower income clients by creating the resources we require to offer pro bono services to those in need. This messaging should be handled with care, tact, and strategy, and included on all of our service pages of the website.
- The inclusion of Five Wishes (our planned giving options, paid services, and other donor/sponsor information) should also be housed in a prominent manner.
- Social media posts should also have the same messaging as what we put on our website. Every post mentioning a service or asking for donations (contributions of any kind) should also have mention of how valuable our services are as well as how the use of our services allows us to help more clients. We want our branding to be one of full inclusion, that we are a nonprofit with a strong business model. Posts should be creative, and appeal to those invested in our mission and on all platforms and digital ads - not only help to inform potential "donors" but to also gain momentum regarding our planned giving / Silver Lining Alliance - through emotional and logical appeal.
- Story-driven so as to maximize connection and impact.

- **Print (Collateral):** For many, print collateral will continue to be the preferred channel of connection. Similar information as the digital format will be available for those individuals in print form: up-to-date current and relevant information in easy-to-read, design savvy layout that can be passed out on campus or external functions and used for awareness and reference. Informative collateral (which is the same as the content on the web and social media.

- We recognize then when out in the community handing out information about our services, there will also be diverse demographics at all events (expos, networking, info sessions, etc.) which would also be interested in how they can be involved and engaged in Silver Key's mission – outside of receiving direct services

- We will be mindful of print costs and will work to be conscious of those costs
- **Direct Mailers:** By including a feature or “blurb” of “your getting care is our giving care” as well as “Aging is...All of Us!” in all mailed material, we can ensure that those who are not utilizing our digital resources are still being directly informed and contacted by us – while not feeling overly solicited. SMD's are already geared toward mission invested sustainable donors, therefore mention of our legacy giving society might be of particular interest to this group of donors
 - *e.g. small “highlight” features in: the quarterly SMD's and quarterly Newsletters*
- **Campaign:** Silver Key has several annual reoccurring campaigns that can all extend their set themes to include messaging around: “your getting care is our giving care” and “Aging is...All of Us” which will reenforce our brand of quality and compassion for people of all incomes and that our clients and services have great value and require appropriate resources to thrive.
 - *e.g.:The EOY campaign, regardless of theme, and interweave the messaging*
 - *e.g.: The March for Meals campaign can stress the importance of utilizing our services to assist us in the ability to maximize our reach of who we can help*
- **Ads in Local Publications:** as most of our paid ads in the publications we have contracts with around town and appear in their distributions, we feature “Aging is...All of Us” as our tag and brand in hopes to enhance brand awareness with the community at large.
 - *Examples of these ad publications are: Life after 50, Senior Beacon, the Indy, South East Express, COS Business Journal, etc.*
 - *Several of these publications are viewed by clients as well as professionals in the community – potential stake holder & sustainable donors (many are in the senior space and passionate about what we do for seniors)*

Metrics & Expected Outcomes:

- Accurate analysis as to the current state of affairs
 - Faithfully representing or describing a precise description
 - Demonstrating a negligible deviation from our standard(s)
- Identification of required actions and resources (time, people, money) to make any necessary changes
- Ensure that we are operating with a quality and effective plan/schedule in terms of personnel and resources juxtaposed to ROI
- Increase brand awareness and ensure "Aging is...All of Us" resides in the subconscious throughout all community members, clients and stakeholders
- Increase education regarding our services and programs that can benefit clients of all financial brackets
- Change community paradigms and understanding of what we do, who we serve, and ways they can help

Initiative 5: Sponsorships and Strategic Partnership agreements

Sponsorships and strategic partnership agreements are mutually beneficial partnerships with businesses, governmental entities, and other community stakeholders to advance organizational growth and community engagement.

Related to sponsorships and strategic partnership agreements, we expect the continuation to increase over the next few years. In part, due to the growing programs and services at Silver Key, we can offer more sponsorship opportunities as we increase the ways in which we service our clients. As we have a high standard for who we partner with in sponsorship, we hold the same standard with other ally and partner agencies. Because these ally agencies and partners are mission aligned, we expect an even bigger increase over the next few years with our push of newly developed concepts, i.e. the current "healthcare" business structure, "Aging is...All of Us," specialized programs (V.E.T.S.), etc. Ideally these changes will draw more sponsorships and partnerships with: Insurance companies, living facilities, etc.

Sponsors invest in partnering with Silver Key for a multitude of reasons. Primarily to connect with our varied and large audience of connection. This network of connection and sponsorship appeals to agencies that align with us and our mission. Current and potential sponsors are often drawn to the marketing potential. Diverse sponsorship levels are available which offer different benefits at varying price points.

Moreover, we have crafted guidelines and principles to steer our decisions related to paid sponsorships, event attendance, other community happenings. While it is entirely possible to be pulled to attend local happenings morning, noon, and night it is important to filter and prioritize which ones are most beneficial.

Our focus is to:

- Attention on gaining new and strengthening current sponsors connections
 - Increase the number of sponsorships (adding at least 25 more by the end of 2023)
- Ally with similarly mission focused groups more closely and frequently
 - i.e. SRC, Alzheimer's Association, AARP, Pillars, etc.
- Utilize sponsors and allied groups networks, unique markets and qualities more effectively

- Outline parameters and guidelines for which events, groups, happenings, etc. we should invest time, money, or human resource in

Organizations of focus include:

- Insurance Companies
- Various Living Facilities (independent, assisted, etc)
- Primary Medical Providers
- Faith Community

Action items for implementation

- Digital
- Print (Collateral)
- Direct Mailers
- Campaign
- Branded Items
- Ads in Local Publications

- **Digital**

- With each sponsorship level we include marketing online as a large incentive for sponsors to commit to a level. Typically, a sponsor (contingent upon dollar level) will receive mention in the e-newsletter, be highlighted in a social media post(s) as well as featured on our website's sponsor page. This strategy will continue along with a quarterly report to the sponsor regarding where they have been featured (in what, how many times, etc.).
 - Ideally, over the next few years the number of mentions and highlights digitally, will increase.
 - Electronic event announcements, flyers and correspondence typically features a sponsor – attributing costs covered to that sponsor – this practice will be heavily practiced, as there is a plan in place to do this for every event or program hosted at Silver Key (or that Silver Key participates in).
- Regarding our allies and partners, we offer in-kind sponsorship benefits, i.e.: logos on the website, mentions on social media and referrals.

- **Print (Collateral)**

- Just as we include mention of our sponsors and partners in digital flyers and invite, we plan to do the same with our printed materials

(flyers, invites, etc.) Printed handout materials are handed out on our campus and other events around time, i.e. expos, and depending on which level a sponsor is, will determine how they are mentioned, on what, and how often.

- It is important to note – frequent word of mouth mentions. Our development team, when out in the community, will be sure to acknowledge our sponsors and partners when appropriate in conversation.

- **Direct Mailers**

- Similar to our e-newsletter, we send out a printed newsletter in the mail quarterly that we feature our top tier sponsors in, we will continue to do this and include it in our quarterly report to the sponsors.
 - We also include top tier sponsors on other mail pieces to include but not limited to: Our annual fundraisers *Save the Date* and Invitation, and Quarterly SMD's

- **Campaign**

- Several of our campaigns are in direct partnership with our ally agencies, i.e. Subaru Share the Love Event, March for Meals – Meals on Wheels of America, Empty Stocking Fund w/ El Pomar, etc.
 - Ideally, we would include other campaigns in our annual rundown – assuming partners agencies and sponsors included that as a component of our partnership.
 - For the current sponsors and partners, we retain them in part by staying as involved in these campaigns and marketing them digitally, in direct mailing and in local publications, as often as possible.
 - It is important to connect them with the CEO and other leadership team members whenever reasonably possible.

- **Branded Items**

- Much like our own logo on our all of our schwag, we offer sponsors and partners their logos on our materials – which are handed out to clients and the community at large. Our most prominent example of the is the Bountiful Bags campaign we have every Thanksgiving – as we put all top tier level sponsors on our Food Pantry's physical bags for Bountiful Bags. This ensures that our sponsors/partners will reach 1300 senior clients annually. This remains and incentive to increase our sponsorship and partnership, as we offer this at the \$5,000 level and above (including in-kind arrangement)

- The option for increasing this service for future sponsors and partners is available to us – assuming band width and funding may support it
- **Ads in Local Publications**
 - As we feature our sponsors and partners on our own digital advertising, we also include mention of them in our ads. One of the most prominent partnerships we have that we currently mention in our local newspapers is Senior Corps (V.E.T.S.) and Five Wishes
 - Obviously, future sponsors and partners would benefit from this as well if prearranged for specific needs and agreements

Guidelines and criteria for evaluating community happenings investment of time, money, and human resource

Though no list is completely exhaustive, the following shall serve as basic guidelines for determining participation.

Additionally, the discussion and contemplation as to which department and staff members that are most appropriate to cover an event shall also be factored into decisions.

Factors include:

- Cost
- Time and staff required
- ROI and ROR of the event
- Competing interests (other commitments)
- Potential “cost” of not attending (opportunity cost) – Absence speaking louder than presence
- Intended goal(s)
- Does it align to playbook, pillars, priorities
- Prior notice/timing
- When is the event held (after hours, weekends, etc.)
- Location
- Other

The list of regularly scheduled events, group meetings, and other community happenings is varied and expansive. The list is dynamic, and while sometimes predictable, these happenings are often discovered with little time to react.

Some examples include:

- Chamber events
- CASTA

- AAA/RAC meetings
- SRC, PPUW, ESF, etc
- Various networking groups, Expos, etc.
- Community Civic Groups (i.e. Rotary, Sertoma, Kiwanis, etc.)
- Community Roundtable
- And Many More

Currently, the process for determination of coverage and coordination is primarily handled by the Director of Volunteer and Community Engagement. A simple example: an event comes forward and once made aware the Director puts the information on the Community Happenings Outlook Calendar. The Director then notifies leadership team members. Members then discuss the merits of attendance, potential coverage, and value to the organization. Once a decision is made, the Director (and if appropriate the correlating leadership team area head) communicates out the decision and other pertinent information to all appropriate stakeholders. Additionally, there are a number of events that team members throughout the organization reflexively attend and participate in without discussion. Person's doing so are entrusted to communicate to all appropriate parties, and to use good judgement prior to paying and/or attending.

Metrics & Expected Outcomes:

- Increase sponsors and partners.
- Enhanced connection with strategic allies
- Sponsors who easily renew their commitment out of the abundance of value associated
- Increase the quality of marketing we can offer our sponsors and partners to incentivize them

Initiative 6: Targeted Audiences/Markets to gain Market Share

In order to be most effective, we will take a strategic and targeted approach to each unique market. By utilizing market differentiation and segmentation models relevant to the group, we will more effectively communicate, connect, and collaborate with each area. Tailoring our messaging will yield the highest return towards this effort.

In this initiative we hope to effectively identify our target markets as well as appeal to them. In promoting to the market share effectively, we will increase our ROI regarding our marketing expenses and allotted cash flow for, creative and strategic, tactics. Our aim is to target donors of all types (major/mid and sustainable) as well as V.I.P. volunteers and paid service clients. Another focus of purposeful outreach with intention centers on our tagline, "Aging is...All of Us!" Industries of note are: Healthcare, Insurance, Faith and Financial companies/agencies.

Targeted audiences, include:

- Types of donors (major/mid/sustainer)
- Faith Community
- Volunteers to become donors and donors to become volunteers
- Direct Health Care
- Insurance Companies
- Financial Companies
- Younger donors and volunteers

Action items for implementation

- Digital
 - Print (Collateral)
 - Direct Mailers
 - Campaign
 - Branded Items
 - Ads in Local Publications
-
- **Digital**
 - By keeping our main webpage current and up to date, mobile accessible and user friendly, we will disseminate imperative

information timely and effectively, increasing our touchpoints with our target market.

- Regular social media posts on all platforms and digital ads will not only help to inform our target market but to also gain momentum regarding the number of posts they and their connections see
 - Boosting and target advertising will also help us narrow our reach to specify our target demographic via pin dropping- specifically within our radial location and to what genders and age groups we want to target our specific post to
- **Print (Collateral):** For many, print collateral will continue to be the preferred channel of connection. Similar information as the digital format will be available for those individuals in print form: up-to-date current and relevant information in easy-to-read, design savvy layout that can be passed out on campus or external functions external functions and used for awareness and reference.
 - This same collateral can be passed out at events our targets markets may be attending, e.g.:
 - *Events: potential donors or sponsors*
 - *Expos – paid service clients or information for potential volunteers*
 - **Direct Mailers:** By ensuring that the content we send is sent to the appropriate audience, we can maximize our messaging and ROI regarding are mailers. By keeping the Black Baud database relevant with the correct information, our target markets can be correctly cultivated. We have several difference mailers, will difference levels of "tailored messaging" and specific demographics for each mailer.
 - *SMD's gear toward the sustainer donor*
 - *Newsletters are geared more toward the volunteers and high to mid-level donor (sponsors and partners included)*
 - *High level donors receiving a different ask message than others*
 - *Holiday cards are geared toward community dignitaries, high level donors and sponsors.*
 - *With each of these different mailers, the content is tailored specifically to the target market – whether it is an emotional appeal/a logical appeal/or a credible appeal*

- **Campaign:** Silver Key has several annual – reoccurring campaigns that can all extend their set themes to be tailored directly to each target market
 - *e.g.: The EOY campaign, regardless of theme, and interweave the messaging around volunteering and volunteers needed*
 - *e.g.: The March for Meals campaign can subtly message to our community dignitaries – involvement, donor status, etc.*
- **Ads in Local Publications:** Our local ads are very strategically tailored – as we have chosen specific papers, for specific reasons, that we tailor messaging to accordingly. Some examples:
 - *Military Papers: Volunteers for our V.E.T.S. programs*
 - *CSBJ: Potential sponsors, high-level donors/community dignitaries*
 - *The INDY: high-level donors/community dignitaries*
 - *South East Express: Volunteers and paid service clients*
 - *Life After 50: Paid services clients*
 - *Senior Beacon: Paid services clients*

Metrics & Expected Outcomes:

- Improve audience with our target market
- Increase the quality of marketing we can offer our target market to incentivize them to engage with Silver Key
- Ensure that we are maintaining a donor-centric approach by messaging and acknowledging donors in the way they want

Initiative 7: New Donor Acquisition and Current Donor Retention

Nonprofits that actively pursue a philosophy and action plan that results in attracting and retaining donors will lead others in the areas of client services, retention, and will create a better sense of community value. Donors who receive donor-centric cultivation and stewardship at these organizations will undoubtedly notice the difference in the quality of service and feedback of impact they are having on the mission they care about. Moreover, most will conclude that an organization that promotes such values is well administrated.

Lastly, any non-profit that takes steps to recruit and retain engaged donors will lead not only by client success stories and fundraising dollars, but also in innovation.

New and current donor retention efforts will include:

- New donor welcome packet/process/procedure
- Donor Survey
- Ways to Give Document
- Informational brochure
- Opportunities to see the results of their giving firsthand

Action items for implementation

- **Digital**
 - By keeping our main webpage current and up to date, mobile accessible and user friendly, we will disseminate imperative information timely and effectively, increasing our touchpoints with our potential and current donors
 - Regular social media posts on all platforms and digital ads will not only help to inform our donors but to also gain momentum regarding the number of posts new potential donors might see
 - Targeting donors in our digital advertising (social and google ads) will also help us narrow our message, tailored directly to and for donors - via pin dropping- specifically within our radial location and to what genders and age groups we want to target our specific post to
 - Content appeals and sensitivity is always taken into account when gearing our advertising towards donors – emotional appeal is key
 - Creating Google Ads that drive searches for services, etc. to Silver Key

- **Print (Collateral):** For many, print collateral will continue to be the preferred channel of connection. Similar information as the digital format will be available for those individuals in print form: up-to-date current and relevant information in easy-to-read, design savvy layout that can be passed out on campus or external functions external functions and used for awareness and reference.
 - This same collateral can be passed out at events and social gatherings that our potential donors – or even current donors- may be attending

- **Direct Mailers:** By ensuring that the content we send is sent to the appropriate audience, we can maximize our messaging and ROI regarding are mailers. By keeping the Black Baud database relevant with the correct information - potential new donors can be correctly cultivated. We have several difference mailers; some are specifically tailored toward new (onboarding) and current (retention) donors:
 - *SMD's*
 - *Printed Newsletter*
 - *Event Save the Date & Invitation*

**Holiday Cards are specifically geared toward the retention of current donors*

- **Campaign:** Silver Key has several annual – reoccurring campaigns that are all targeted toward our donors (new and current). Each campaign has a specific goal regarding our donors and their involvement:
 - *March for Meals*
 - *Bountiful Bags*
 - *Colorado Gives Day*
 - *Giving Tuesday*
 - *Empty Stocking Fund*
 - *Subaru's Share the Love Event*
 - *End of the Year Campaign*

- For each of these campaigns listed above:
 - *Current Donor: To encourage additional donations with emotional appeal marketing material – shared primarily in Printed Newsletter, SMD and Digital media around the campaign.*
 - *New Donor: To onboard new donors by tapping into their emotional pipeline and igniting their passion for seniors in the Pikes Peak area*

- **Ads in Local Publications:** Our local ads are strategically tailored for specific audiences, donors included. By updating our ads to show “what’s new” at Silver Key and how we are engaging our community and assisting seniors, we gain traction with current and potential donors. The publications we advertise in geared most toward getting the attention of donors are:
 - *Military Papers: Highlighting: V.E.T.S. programs*
 - *The Colorado Springs Business Journal (Digital)*
 - *The Independent (Print & Digital)*
 - *The Colorado Springs Gazette (Print & Digital)*
 - *Relocation Guide*
 - *Various Others*

Metrics & Expected Outcomes:

- Improve new donor retention rates
- Increase current donor giving levels and frequency
- Attract and keep more engaged donors.
- Identification of required actions and resources (time, people, money) to make any necessary changes.
- Identify how much it costs to attract and keep a donor
- Further connect donors to the organization
 - Donors may become volunteers and/or clients

Target Market

Within our target market(s), we have identified the following personas to represent our ideal target market:

Current

- V.I.P. - volunteer (avg age 67)
- Donor (avg age unknown-estimated 60+)
- Clients (avg age 72) mostly white

New:

- V.I.P. – volunteer
- Donor
- Clients

Desired

- V.I.P. – volunteer increase in younger (i.e. 35-55)
- Donor (monthly, major \$1000 annual)
- Clients (private pay-wealthier)
 - *Age Diversity*
 - V.I.P. – volunteer: 35-55
 - Donors: 18-34,

Wealthier: Clients (private pay)

- North end of El Paso County
- Homeowners
- People that plan for care
- Care about social return on investment (conscientious consumer)

Referral Sources:

- Medical offices - healthcare
- Insurance organizations
- Legal firms
- Faith community
- Financial firms

- Caregivers: Large and established, regional,

Regional Business(es) – Potential Sponsors:

- Independent, Skilled, and Assisted living
- Insurance
- Legal
- Real Estate
- Financial/mortgage

Examples: GE Johnson, Woodford Manufacturing Charities, Mathews Vu, UCHealth, Centura, Luisa Graff, Encompass Health, other

Personas

[Client (Families), Persona 1]- care givers and adult children.

The family member of a client (adult son or daughter) is typically middle aged. S/he works for a living and spends his/her free time taking care of family – whether that be children and parents, or just their parents. Ultimately, our client’s family members want *eyes on* mom and dad. A way to know that their family is taken care of during their busy day, juggling work and life’s responsibilities.

[Volunteer, Persona 2]

[The Silver Key Volunteer] is typically made up of retired locals (some are of a younger demographic). Because this group generally has the benefit of time, we offer as much additional training and education as possible to accompany their volunteering experience. Not only do volunteers get the benefit of knowing they have made a huge impact, but they also receive development across the lifespan (personally and professionally) skill building and overall individual growth, which is something many individuals are looking for – particularly retirees in their current “laid back” lifestyles; something to bring balance to their day and a new sense of purpose.

[Donor/ Sponsor, Persona 3]

[Donor] is typically 55 + years old. Especially our high-level to mid-level donors. These stakeholders are typically invested in the mission of seniors because of personal experiences and emotional stories that fuel their passion for choosing us. We take this into account when appealing and storytelling to our potential donor

audiences with our marketing content (videos specifically). Many donors choose Silver Key because of our brand and our long-standing presence/reputation in the community. Another motivator for their gifts is to not only make a difference in the life of a senior, but to leave a legacy, contribute to a cause they can be tied to that they are proud of. We offer them that reassurance by keeping them in our direct mail distribution, through holiday cards, newsletters, and social media outlets.

Sponsors are invested in partnering with Silver Key for a multitude of reasons. One of the biggest reasons we have found is that our client and donor base is among the wealthiest in all of Colorado Springs because of their age and financial maturity. Many of our community partners, donors and high-level stakeholders are well connected in the community and this appeals to agencies that align with us and our mission. These current and potential sponsors are often drawn to that element for marketing reasons. Another large benefit for sponsors is an audience with seniors. This is very popular with our sponsors in the senior space, i.e., PACE, United Healthcare & Medicare agencies, etc. We offer many different sponsorship levels, which offer different benefits at varying price points. We report on each sponsor's ROI by giving them a rundown of their quarterly impact or appearances and levels of involvement.

Competitive Analysis

Within our target market(s), we expect to compete with the following agencies:

Innovage

Competitor's Expository: "help frail seniors age in their own homes with dignity. InnovAge has done this through PACE for more than 20 years. As the largest provider of the Program of All-inclusive Care for the Elderly (PACE) based on participants served, InnovAge is dedicated to expanding this successful program to serve as many seniors as possible across the country."

- Innovage is comparable to us in their mission. Their goal is to keep seniors in their homes for as long as possible, They offer several different services, however much fewer services than us
- This is a nationwide organization which differs from our local organization
- *Note: Calling seniors frail and using the term "elderly" – is already stripping them of their dignity, this message seems insensitive*

Diversus

Competitor's Expository: "Colorado Counseling & Mental Health Support Services. We provide counseling, behavioral health, mental health, and crisis support services in Colorado. Learn more and get started today."

- Diversus is comparable to Silver Key in their mental health/behavioral health, counseling, and case management services
- Diversus is not specific to seniors only; therefore, our services are better targeted and specialized in the geriatric field, making us more competitive

Envida

Competitor's Expository: "More than services. Our passion. Getting around and staying in your home are essential to your health and happiness. That is why we've transported our clients to medical appointments, work, classes, recreational

activities and more for nearly 50 years. With our Homecare Services we support your desire to stay where you are most comfortable – home."

- Envida is comparable to Silver Key in our Reserve & Ride transportation service and our Reassurance+ service
- They too have been in business over 50 years
- They do not run the full spectrum of services (Nutrition, Health & Wellness, etc.)
- Very corporate feel
- Currently in partnership with as regional specialty transport provider

Right at Home: Home Health Sector (Multiple Businesses)

Competitor's Expository: "RightCare is our comprehensive approach to delivering the care your loved one needs. It starts by having the right people delivering the right services the right way. From the moment you call, we will work to understand your family's needs and listen to your concerns. We will create a custom care plan specifically for your loved one based on a thorough needs assessment. As your loved one receives care, we will stay in contact with you, keeping you updated on the care we are providing and how your loved one is doing. With our personalized care plans, managed by professionals, your loved one will always get the care they need.

As a person begins to age, family members often feel the need to help with everyday tasks their loved one now finds challenging. It can be hard to tell when aging is affecting a family member because small things can add up to a larger challenge incredibly fast. If this sounds like something your family is experiencing, you're not alone. Today, more than 34 million adults are providing care to a loved one over the age of 50."

- Right at Home: Home Health Sector is comparable to Silver Key's Reassurance+ service, under the umbrella of Health & Wellness services
- Silver Key offers many additional components of whole person care that Right at Home does not offer
- Our prices are more competitive, as our business model is also much different

- Right at Home appears to have a slightly farther reach, as they serve: Greater Colorado Springs and El Paso County, Monument, Palmer Lake, Black Forest, Gleneagle, and the Air Force Academy

Project Angel Heart

Competitor's Expository: "Our Mission: Project Angel Heart improves health and well-being for people with life-threatening illnesses by preparing and delivering medically tailored meals and promoting the power of food as medicine.

Our Vision: Our community is healthier, happier, and stronger because nutritious food is valued as a key component of health and available to all who need it"

- Headquarters located in Denver; satellite office in Colorado Springs
- Project Angel Heart is in the same vein as our Health & Wellness Services & Community Services
- Project Angel Heart is comparable to Silver Key's Meals on Wheels, Connections Café, and Reassurance Plus services.
- Project Angel heart has a very similar vision as Silver Key – as we also believe that "Food is Medicine."
- Project Angel Heart is not exclusively in the senior space, therefore making their reach and bandwidth limited by all age groups they serve.
- Silver Key has the advantage in that we can offer our clients many different option for nutrition services: Meals on Wheels, Home Delivered Meals, Connections Café, the Silver Key Food Pantry, and Reassurance+

Care and Share

Competitor's Expository: "Our Mission: At Care and Share Food Bank, our core purpose is to bridge the gap between hunger and abundance. Our mission is to provide food, partnering opportunities, and education to fight hunger and food insecurity in Southern Colorado communities. Our vision is a hunger-free Southern Colorado."

- Care and Share is often "compared" to Silver Key's Food Pantry, but they are a food bank. This perceptual difference is a challenge to message around

- Though a “partner,” Care and Share has a far reach (33 counties in Southern Colorado), and could be considered one of the “strongest competitors” regarding food insecurity among seniors (in terms of PR, raising funds, etc)
- Much like many other agencies listed in this analysis, Care and Share is not exclusively serving seniors
- Care and Share is supported by their national corporate headquarters and are recognized nationwide.

GoodWheels/Goodwill

Competitor's Expository: “GOODWHEELS CAN HELP YOU ON THE ROAD TO INDEPENDENCE. Goodwill has rolled out its own transportation service, “GoodWheels,” offering Door Through Door service to mobility challenged individuals traveling to appointments, community outings and other important destinations. Our licensed, professional drivers can transport clients who use either standard or bariatric-sized wheelchairs, as well as individuals who are completely ambulatory.

GoodWheels can take you to any destination within a 20-mile transport radius if paying through insurance or an unlimited radius for those using private pay. Yes, GoodWheels truly offers Your Ride, Your Way, and we are confident that you'll rate our courteous drivers six stars!”

- GoodWheels/Goodwill is comparable to Silver Key's Reserve & Ride transportation service
- GoodWheels is also a company that does not exclusively serve seniors
- It appears their reach isn't as great (limited distance of rides to s 20 mile transport radius
- Goodwill is a very big name and a huge competitor in the Pikes Peak Region
- Their reach is very far regarding brand recognition/awareness

Bros Redevelopment. (Bros)

Competitor's Expository: “We believe safe, decent and affordable housing should be achievable for all Coloradans. Every day, we seek to eliminate barriers to housing goals for low-income populations and are rising to meet the needs of those who are relying on our services during the COVID-19 crisis.”

- Headquartered in Denver; satellite facility in the Springs
- Has been in operation for 50 years; extensive experience in senior home repairs
- Bros Redevelopment. (Bros) is comparable to Silver Key's housing navigation services as well as potential (future) housing plans for a 55+ living community
- They provide services for home modifications for continued dignity and independence for aging in place
- They are aggressively growing and pose a potential threat, particularly in terms of AAA dollars

Catholic Charities of Central Colorado

Competitor's Expository: "Catholic Charities of Central Colorado, Inc. is the social service arm of the Diocese of Colorado Springs. It was incorporated as a 501(c)(3) human service organization in 1968. It is currently one of over 1,600 Catholic Charities USA social service agencies in the United States. Catholic Charities provides social services throughout a 10-county area with most of the services targeted to people living in Colorado Springs, Castle Rock, El Paso County and Douglas County. The agency provides services to people of all races, backgrounds, and beliefs. Catholic Charities **Provides Help and Creates Hope** for people who are poor and vulnerable in our area through the efforts of a wide range of programs and services. Catholic Charities serves anyone in need regardless of religion, race, gender, age, disability, socioeconomic level or background."

- Catholic Charities offers a wide variety of services, similar to Silver Key
- Catholic Charities is not exclusively focused on seniors, and often refers seniors to us for support
- The region they serve is larger (10 counties - 20% of Colorado's population) including a facility in Castle Rock, and the Marian House "soup kitchen" for the homeless
- Catholic Charities pro and con is that they are faith based
- Both members of United Way and Empty Stocking Fund

Other Community Competitors:

Lesser-known other organizations may still compete with us, but our primary focus are the agencies listed above.

How we plan to beat out the competition: Silver Key has a long-standing reputation in the community as a corner stone pillar for “everything seniors.” We are the only 501(C)3 nonprofit in town that offers the diversified quantity of services we do, for the price, and quality that we do. The relationships built over the last 50 years are also unique to Silver key. From a developmental standpoint, the roots and connections in the community run deep and Silver Key in partnership with other staple organizations, corporation, businesses, and funders in the community. The Silver Key's image currently maintains its inclusive and quality brand.

Specific services that will keep us in the lead and aid in our business endeavors are:

- Paid Services
- Unique partnerships: Five Wishes
- Uniquely funded services: V.E.T.S.

Budget

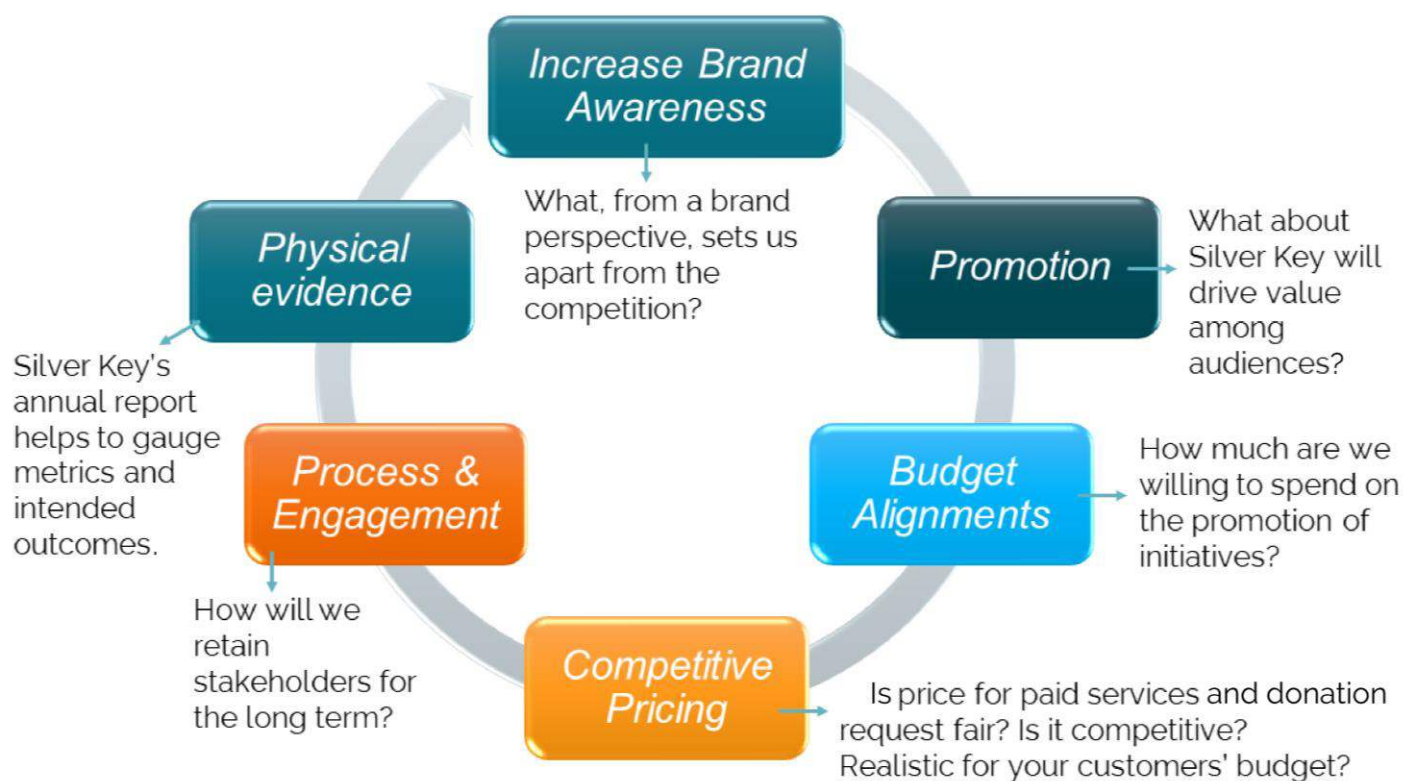
Currently our marketing budget is well below industry standards and best practices. According to Strategic Advisors to the Nonprofit Sector, usually, a nonprofits marketing budget would be somewhere between 5 and 15 percent of the total—depending on the size of organization, its structure and its mission focus. Silver Key has between ½ % - 1% of their budget allocated to Marketing.

Additionally, the primary marketing team is extremely lean in terms of people resources. Consideration for additional support to this area should be given for satisfactory and optimal results.

Over the course of the next three years 2021-2023, given the funds allotted to the Marketing team, we expect to invest in the following items to ensure we meet the objectives outlined in this marketing plan:

[**See addendum A for budget details**](#)

Evaluation



Increasing Brand Awareness

Our brand is composed of our mission, our reputation, our values, and beliefs (“Aging is...All of Us!”) Our quality of care for seniors in the Pikes Peak region is what sets us apart and is how we are identified by external audiences. By exercising the strategic planning in each initiative section of this document, we expect to excel above the competition and ensure that the Silver Key brand awareness assertion has significantly increased from 2021 – 2023 in our community.

It is our goal that all clients and stakeholders will continue to put their trust in Silver Key and associate our brand with the subconscious notion that we are not only the corner stone of “everything seniors” in the Pikes Peak region, but that we are a vetted and long standing organization that is fully committed to making the Pikes Peak Region the best community in the nation to age.

Though difficult to measure, key metrics of trust will be: increased private pay service customers, improved brand recognition, and more sponsors and donors.

Promotion

We will ensure the increase in brand awareness by remaining diligent in our social media presence and all digital marketing efforts. We will also remain focused on all our messaging in campaigns, direct mail and all communications with external audiences (printed and spoken). By having our strong mission statement, rally cry and tag line to reference, we will guarantee that our brand resonates with the community on all levels, regardless of involvement.

Our target market is comprised of donors and sponsors, volunteers, clients, and their families. Ideally, our new programs like Five Wishes, Silver Key Champions and the Silver Lining Alliance will attract and maintain donors while promoting our brand among the upper echelon of high-level donors: those who are involved and well connected to the community, funneling involvement from potential sponsors.

Promoting the programs and services that would appeal to donors and sponsors will be executed via social media and digital/print advertising. However, the platforms and channels are not as important as the strategic content we place on these outlets. Ideally storytelling, data, as well as emotional appeals combined with our legacy of more than 50 years (and the credibility/reputation that brings), will gain us traction and render our services investment worthy.

We hope to gain the involvement of volunteers and a new demographic of clients interested in our paid services, by leveraging the concept that their getting care, if our giving care. Highlighting: *“Aging is...All of Us!”* and incorporating that messaging in campaigns, direct mail and advertisement around paid services, traction will be gained with clients and their families. The same messaging will appeal to the volunteers as well, with an extra emphasis on our additional trainings and educational opportunities available to them as well.

Budget Alignments

(See Addendum A)

The Budget has been set up to coincide with the strategy of all our initiatives and expenses have been accounted for regarding social media boosting, google ads, advertising in local publications and all other expenses regarding collateral, signage, schwag, etc.

Competitive Pricing

The pricing set for paid services are very competitive, as most of our services are offered at a much more affordable price than our competitors. Another perk, is that all of our paid services help to fund all other programs and services, benefit those clients that may be experiencing financial hardship. Much like many human service agencies (buy one and supply one) our business model promotes the use of our services to benefit seniors in our community (pro bono).

For many of our other services, we request a donation if our clients have the means; however, we do not have a set charge or force payment. Our resources are not “free” however, they are reasonable, and each situation is handled individually with care.

The prices at our Thrift Store are arguably the most competitive in town and would be considered a “great deal” by virtually anyone who might shop with us. There are many other examples of our great pricing to include but not limited to our sponsorship packages. There is one constant factor that underlies our current business model which allows for affordable services: our incoming resources: (grants, sponsors, and donors.) Due to these funding streams and the economies of scale, we can serve many seniors at a reasonable cost of business.

Process of Retention

Gaining and retaining our target audiences is an ongoing process. As Silver Key continues to advance, we grow our programs and services as well as add to them. Many of the new additions within the last year or two (several paid services, Five Wishes, V.I.P., V.E.T.S., Reassurance+, Behavioral Health, Silver Lining Alliance, and more) are also geared toward appealing to our target market as well as making them a part of our extended family, who will grow and age with us.

Retaining these markets is all about keeping them engaged and involved. Staying current and communicative is the largest focus of our process. Updates via personal email and direct mail, usage of advance technology (text messaging services) and the willingness of our organization to stay visible and transparent is key.

Physical Evidence

We produce an annual report every year which we share with external audiences. Prior to our annual report, we are audited, and our development team receives

reporting regarding the numbers (i.e. expenses vs ROI for all areas of the organization.) Most recently, our efforts have been a great success with an increase in growth each year, keeping Silver Key financially in the “black.”

We are able to gauge our efforts and strategize based on what both qualitative and quantitative measures have the most return. Marketing specifically, during this same time, will use the analytics of our website, social media platforms and Google – to assist in future strategizing. By looking at the analytics we can see what worked, what didn't and why. This feature is most important to the marketing team in terms of physical evidence.

In Summary

By implanting all elements of this marketing strategy, we plan to raise awareness around our brand and our organization in hopes our marketing efforts will foster better community relations leading to furthered engagement: use of paid services, volunteering, donations, grants, and sponsorships.

Strategic Summary

Environmental Scan

- **Primary and Secondary Marketing Groups:**
 - **Primary:** Derek Wilson (*CSO*), Dianne Reitan (*Marketing Manager*), Megan Buckner (*Marketing Consultant*), and Allie Downing (*Development Support Specialist*)
 - **Secondary:** Roxanne Eflin (*Senior Manager: Grants & Special Projects*), Sean Dana (*Senior Manager: Donor Relations*), and Jessica Arana (*Events & Donor Relations Manager*)

- **Current Climate**
 - **Fundraising Goals:**
 - Event (& Sponsorships):
 - Quarterly SMD's:
 - EOY Campaign:

- **Marketing Tools & Resources:**
 - **Digital**
 - Hoosuite, Website/WordPress, Adobe Creative Suite, Free online images, Paid Subscriptions, Communication Tools
 - **Partners/Vendors**
 - Colepromo (Promotional items), Signorama (Vehicle wraps and signage), The City Printer (All printed mailer, collateral, etc.)

Threats and Opportunity Analysis

- **Strengths:** 50-year history, good reputation for helping low-income seniors.

- **Weaknesses:** Known for only helping the lowest-income (*poor*) seniors of the community.
- **Opportunities:** Re-branding “We support all seniors across all income levels.
- **Threats:** Population explosion could mean more competitors starting services that compete with SK.

Defined Marketing Modes

- **Digital**
 - Silver Key’s Website, Google Ads, social media (boost): Facebook, Instagram, LinkedIn, Twitter, Use of Videos: YouTube, Publications: digital ads, i.e. Colorado Springs Business Journal
- **Print (Collateral)**
 - Brochure, Rack Cards, Flyers, Folders
- **Direct Mailers**
 - SMD, Holiday Mailers, Event Save the Date and Invitation, Printed Newsletter, Other
- **Ads in Local Publications**
 - Life After 50, Senior Beacon, OCN, The Indy, The South East Express, The Military Papers
- **Campaigns**
 - Bountiful Bags, End of the Year Campaign, Share the Love Event, Giving Tuesday/Colorado Gives Day, March for Meals/Champions Week
- **Branded Items**
 - Campus signs, Event Signage, Vehicle wraps, Schwag
- **Peer to Peer**
 - Networking events, Fundraisers, Expos, Educational opportunities, Community engagement

Marketing Channels

- Silverkey.org
- Facebook [@SilverKeySeniorServices]
- Instagram [@silverkeycos]
- Twitter [@SilverKeyCOS]
- LinkedIn [@Silver Key]
- YouTube [@SilverKeyCOS]

Marketing Initiatives: Market and Channels

- **Initiative 1**
 - **Private pay/social impact/social enterprise**
 - R+, Guardianship, MPOA, HDM, Thrift Store, etc.
- **Initiative 2**
 - **Multi-modal (tech emphasis)**
 - Texting, Social media and e-news audience increase (ads also), Web interface friendly, Video, Tailored / segmented messages depending on audience group, Radio, SEO improvement, Web ads, Use of and implementation of RE automated and other resources, Direct mail pieces (polished, tailored, and increase number of folks [printed newsletter, etc.], Story Sharing, Infographics
- **Initiative 3**
 - **Legacy Giving**
 - Five Wishes, Silver Lining Alliance (also for major donors)
- **Initiative 4**
 - **Brand synonymous with: Quality, compassionate care for all (people/incomes) – Your getting care, is our 'giving' care**

- Support or receive (choose), Aging is...All of Us!, Rally Cry – Our clients and services have great value and require appropriate resources to thrive!
- **Initiative 5**
 - **Sponsorships and Strategic Partnership agreements**
 - Which events and happenings to sponsor, attend, participate in, and support
 - Insurance Companies, Living Facilities, Focus on gaining new and strengthening current
 - Increase sponsorship (dollar metrics and total count)
- **Initiative 6**
 - **Targeted Audiences/Markets to gain Market**
 - Types of donors (major/mid/sustainer), Faith Community, VIP's - > donors and donors -> VIP's, Direct Health Care, Insurance Companies, Financial Companies, Younger (engaged at every age)
- **Initiative 7**
 - **New Donor Acquisition and Current Donor Retention**
 - New donor welcome packet/process/procedure, Donor Survey, Ways to Give Doc, Other

Target Market

- **[Client (Families), Persona 1]- care givers and adult children.**
- **Personas 1, 2 & 3**

Competitive Analysis

- **Within our target market(s), we expect to compete with the following organizations:**
 - Innovage, Diversus, Envida, Right at Home: Home Health Sector (Multiple Businesses), Project Angel Heart, Care and Share, GoodWheels/Goodwill, Bros Redevelopment. (Bros)
- **Competitive Advantage**

Budget

- Currently our marketing budget is well below industry standards and best practices. Additionally, the primary marketing team is extremely lean in terms of people resources. We expect that our goals will be met over the next few years with no financial depletion, concerns or constraints as the budget is well built and thorough, where funds are properly allocated.

Evaluation

- **Increasing Brand Awareness**
 - It is our goal, that all clients and stakeholders will continue to put their trust in Silver Key and associate our brand with the subconscious notion that we are not only the corner stone of "everything seniors" in the Pikes Peak region, but that we are a vetted and long standing organization that is fully committed to making the Pikes Peak Region the best community in the nation to age.
- **Promotion**
 - We will ensure the increase in brand awareness by remaining diligent in our social media presence and all digital marketing efforts, as well as remain focused on all our messaging in campaigns, direct mail and all communications with external audiences (printed and spoken).
- **Budget Alignments**
 - The Budget has been set up to coincide with the strategy of all of our initiatives and expenses have been accounted for regarding social

media boosting, google ads, advertising in local publications and all other expenses regarding collateral, signage, schwag, etc.

- **Competitive Pricing**

- The pricing set for paid services are very competitive, as most of our services are offered at a much more affordable price than our competitors.

- **Process**

- Acknowledging that gaining and retaining our target audiences is an ongoing process. As Silver Key continues to advance, we grow our programs and services, as well as add to them. Many of the new additions within the last year or two are also geared toward appealing to our target market as well as making them a part of our extended family, that will grow and age with us.

- **Physical Evidence**

- We are able to gauge our efforts and strategize based on what both qualitative and quantitative measures have the most return. Marketing specifically, during this same time, will use the analytics of our website, social media platforms and google – to assist in future strategizing. By looking at the analytics we can see what worked, what didn't and why.

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Marketing Plan - Strategy for 2021

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"Aging is...All of Us!"