Situation Analysis

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Situation Analysis

UMAR, founded in 1983, is a non-profit organization serving adults with intellectual and developmental disabilities (DD) in Charlotte and surrounding regions. The main office is located in Huntersville, NC. UMAR provides various community inclusion services to program participants such as group housing, supported employment, and an art program called UMAR ARTS (UMAR, 2011c). With a small staff and limited budget, UMAR experiences multiple challenges to marketing its services and gaining visibility in the community (L. Brennan, personal communication, September 16, 2011). Two such areas to be addressed in this marketing campaign are branding and social media marketing.

UMAR is an acronym for United Methodist Agency for the Retarded. However, the name is not written out anymore as the word "retarded" is now considered pejorative. While changing the name is not a high priority for the management team, the issue does create a challenge for UMAR staff when asked about the acronym. The organization is open to the idea of changing its name, provided it makes sense with the logo and does not alienate the United Methodist Church. The biggest concern regarding branding is the organization's key messages. According to Lena Brennan, development manager, there is inconsistency internally and externally with branding messages. UMAR needs a clear, concise summary that will be consistent across all levels (board, staff, volunteers, etc.) and will generate a "buzz" in the church community and the general public. Employees need to pitch and represent their programs in a clear and concise way that will resonate with potential supporters. In other words, they need to answer "What is UMAR?" in a catchy, consistent message (L. Brennan, personal communication, September 16, 2011).

Brennan has been working to improve UMAR's social media marketing since she joined the staff in 2010. Currently UMAR has an organization website, newsletter, Facebook page, Facebook advertisements, Twitter account (tied to Facebook through an RSS feed), and a Constant Contact marketing account (L. Brennan, personal communication, September 16, 2011).

UMAR's Facebook postings include links to relevant news articles, statistics about DD, and announcements about UMAR events (UMAR, 2011b). Posting photos creates a special challenge because the program participants or their guardians must give written consent for any photography. Brennan would like to create a time-efficient strategy for one staff member to maintain social media marketing (personal communication, September 2011).

UMAR fills a critical gap in high-quality services offered to adults with DD in the state. As with most non-profit organizations, UMAR's challenges stem primarily from a lack of funding and resources. With government budget cuts, the organization must reach out even more to the community for support. Therefore, raising community and brand awareness is crucial. Enhancing visibility of UMAR may also raise public awareness of DD. Not only does this awareness create more support from potential donors, but it may also generate more volunteers, allow better access to resources, and aid in dispelling public misconceptions about DD. UMAR staff believe people tend to shy away from things they don't know or understand. Therefore, raising public awareness of DD helps UMAR reach its overarching goal of community inclusion for program participants (L. Brennan, personal communication, September 16, 2011).

Consequences

According to UMAR's website, DD commonly affects one or more of the following areas: self-care and self-direction, learning, mobility, ability to live independently, receptive and

expressive language, and economic self-sufficiency (UMAR, 2010c). With these areas of concern, UMAR seeks to create awareness of DD within surrounding regions. By educating the public about DD, UMAR hopes to help affected adults maintain a fulfilling lifestyle (M. Garner, personal communication, September 21, 2011).

Marilyn Garner, UMAR's development director believes its employees and volunteers view their job as something other than work. They have compassion for others that drives them to help program participants each day. However, the ability to provide appropriate care and suitable facilities requires more than just compassion. Funding, resources, and adequate knowledge of the needs of an adult with DD are essential. Therefore, Garner is seeking a dramatic increase in the awareness of DD within the next year. Enhancing DD awareness provides an opportunity for citizens understand UMAR's key role in the community and the necessity of sufficient funds for status quo care (M. Garner, personal communication, September 21, 2011).

Although donations fuel UMAR's success, government budget cuts are a lingering threat preventing the organization from certain areas of expansion. UMAR has struggled to sustain sufficient funds for its programs. Government budget cuts appear unexpectedly and necessitate change in budget plans. Garner explains that the government has the right to contact them halfway through the year and cut thousands of dollars from their annual budget. These cuts can significantly affect the opportunities UMAR provides its participants (M. Garner, personal communication, September 21, 2011).

Garner asserts that UMAR program participants have unique abilities setting each of them apart. Social media outlets create opportunities for UMAR to showcase the success of its programs and the participants. Highlighting the artistic skills and innovative ideas of UMAR

participants is a focal point in social media messages. Positioning social media outlets to emphasize UMAR's success may allow community members and stakeholders to observe the organization's impact on adults with DD. Garner is focused on UMAR's growth, continually pushing the critical role of its services. With constant participation through media outlets, the organization could potentially have a greater impact in the community (M. Garner, personal communication, September 21, 2011).

Research

Though the information received from the client is accurate, more research needs to be completed. There are many pieces of information that must be addressed to better assist the organization with its branding. This information can be uncovered through researching public perception and understanding of UMAR.

Previous research done by UMAR is a compilation of formal and informal research completed by employees and affiliates. Surveys, personal observations, and organizational experiences have all been completed to determine public perceptions of UMAR. Based on this research, Garner noted, "People don't get what we're doing. They think we're a daycare instead of a program" (personal communication, September 21, 2011).

This campaign strives to fully acknowledge stereotypes and misinformation the public may have towards the organization. Thorough research and understanding about UMAR's key publics their perceptions of the organization is critical.

Internal Analysis

According to Garner, UMAR staff take immense pride in the care they provide. She believes they acknowledge and live by the organization's motto, "Live, Work, Play" (personal communication, September 21, 2011). Garner attests that UMAR has many satisfied participants

and stakeholders. Juliana Yates, parent of a UMAR participant, supports Garner's claim as

quoted on the organization's website:

> It has answered my prayers knowing that my son is being allowed to be the best he can
>
> be. I think the UMAR staff is superior. They are always interested and willing to listen to
>
> what the resident or the family has to say. UMAR truly is his second home (UMAR,
>
> 2011, para. 3).

UMAR has the advantage of being one of the few non-profits to offer residential services,

vocational opportunities, and an ARTS program (M. Garner, personal communication,

September 21, 2011). These services fulfill UMAR's mission to provide adults who suffer from

DD a lifestyle of service excellence, a compassionate environment, trust, sincerity, respectability,

and church involvement (UMAR, 2010c). Garner firmly maintains that UMAR's dedicated staff

fulfills these values and that UMAR is the "Cadillac of all providers." Overall, Garner would

grade UMAR's service and product as an A-minus. She said, "There will always be room for

improvement--nothing is perfect. However, we strive for perfection and try our dead-level best

to deliver it" (personal communication, September 21, 2011).

UMAR's operating budget for the fiscal year 2011 to 2012 is $7,385,513. Approximately

87 percent of its funding is provided by the government (State, local, and federal) and the

remaining 13 percent consists of contributions from businesses, individuals, foundations, and

churches. Program services encompass 85 percent of this budget, 11 percent is for

administration, and four percent is allotted to fundraising (UMAR, 2010c). This budget is

extremely small for an organization providing such comprehensive accommodations and

programs as UMAR offers. Budget concerns are therefore UMAR's largest obstacle (M. Garner,

personal communication, September 21, 2011).

Budget constraints make it impossible to accept everyone who applies for services (M. Garner, personal communication, September 21, 2011). UMAR employee, Ruth Singer-Stunk, believes UMAR desperately needs to improve its branding in order to become more financially stable (personal communication, September 21, 2011). "That's the biggest disadvantage that we are faced with, like all non-profits. If we could publicize how great of an organization UMAR is, I have no doubt we could get more monetary donors" (R. Singer-Stunk, personal communication, September 21, 2011).

Another drawback facing UMAR is the cross and flame depicted on its logo. There is concern among the staff that UMAR's logo may be controversial, especially in a diverse state like North Carolina. Although UMAR is supported by the Methodist Church, community members outside the Christian religion could be skeptical to join this organization. UMAR is open to brainstorming for a new logo (and possibly a new name as previously mentioned). The leaders are willing to make necessary changes that will better brand their service (M. Garner, personal communication, September 21, 2011).

According to Garner, the biggest problem concerning UMAR employees is that infrastructure has not kept pace with growth. UMAR has rapidly expanded as in recent years but cannot afford to augment the staff accordingly. Due to liability and training requirements, it is often difficult to take on numerous volunteers (M. Garner, personal communication, September 21, 2011).

External Analysis

The staff at UMAR does not believe competition should exist in the world of disabilities (M. Garner, personal communication, September 21, 2011). Nevins, LifeSpan, and Enrich are all providers for adults with disabilities in the Charlotte region. However, one advantage that

Nevins and LifeSpan have over UMAR is they accept participants of all ages, whereas UMAR

has an age requirement of 18 (Nevins, 2011; LifeSpan, 2008). It creates a limitation for UMAR

because participants who begin with Nivens or LifeSpan are likely to stay with them. Moreover,

both of the other organizations have a strong reputation and have been operating longer than

UMAR (M. Garner, personal communication, September 21, 2011).

LifeSpan is predominantly located in the central and eastern part of North Carolina and

Nivens is most prominent in South Carolina (Nevins, 2011; LifeSpan, 2008). UMAR is

primarily geared toward western North Carolina and the Triad area (UMAR, 2010). Enrich and

Nivens also offer individualized and one-on-one services to participants, where UMAR does not

(M. Garner, personal communication, September 21, 2011). Additionally, Nivens has a strong

presence in the community and expertly brands its services (R. Singer-Stunk, personal

communication, September 21, 2011).

UMAR recently opened a new group home in Cornelius, NC and is constantly adding

new activities. Over 200 individuals are currently being served by UMAR, a number that has

increased every year since it opened in 1983 (UMAR, 2010c). UMAR is almost forced to

consistently grow each year, or it risks losing government funding (M. Garner, personal

communication, September 21, 2011).

Perception

UMAR is well known around the community in which it affects. Its Facebook page has

over 500 fans, but is primarily favored by program participants and their families (UMAR,

2011b). UMAR's program services are described in detail on its website and briefly on its

Facebook page (UMAR, 2011c; UMAR 2011b). UMAR also has pamphlets and brochures

available for members. Though UMAR is known around the Charlotte area, it is often mistaken

for organizations such as Nevins and LifeSpan (M. Garner, personal communication, September 21, 2011).

There are three reputations associated with UMAR (M. Garner, personal communication, September 21, 2011). People with the most complete understanding of the organization and its services hold it in high regard, often referring to UMAR as a second family. People with moderate understanding and awareness of UMAR view it primarily as a daycare for mentally challenged adults. Finally, those with little to no understanding of UMAR assume it is purely a religious organization due to UMAR's branding and symbols. (M. Garner, personal communication, September 21, 2011).

UMAR managers are dissatisfied with its reputation, which has improved minimally in the past three years. More people know about the organization and its accomplishments than ever before, but Garner feels UMAR still does not receive the attention and recognition it deserves. UMAR must be recognized for its services, not just the population it serves. Among its services, UMAR must also be known for more than just its housing program. Improving UMAR's reputation and visibility may increase the organization's support base for funding and resources. (M. Garner, personal communication, September 21, 2011).

Target Publics

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Target Publics

Choosing the most appropriate publics to target in this campaign is a critical step. During an

initial brainstorming session, various publics were identified based on their connection to UMAR

and its organizational goals and activities. Several publics were identified by their current

participation with the organization, including program participants, family members of program

participants, volunteers, employees, board members, and donors. Other publics were noted to

have potential as program participants or donors, such as all adults with developmental

disabilities (DD) in Charlotte and surrounding regions, their family members, and church

members in regions served by UMAR (L. Brennan, personal communication, September 16,

2011).

Several UMAR publics were identified for their potential to support UMAR programs.

Some of these groups support UMAR ARTS, or have potential to do so. These publics include

art gallery and museum owners in Charlotte, the patrons of those businesses, patrons of NoDa

businesses, and local artists in need of assistants. Many businesses serve as current or potential

employers for participants of UMAR's supported employment program. Therefore, UMAR's

publics also include managers and owners of grocery stores, restaurants, and drugstores in

Charlotte and surrounding regions. Businesses and foundations in fields of interest relevant to

UMAR are also an important public (UMAR, 2011c).

UNC Charlotte students are an additional public because of their potential to become

interns, volunteers, or even future employees. Residents in close proximity to UMAR's group

housing locations are another public who can facilitate community inclusion. Finally, social

media users in Charlotte were identified as another key public with potential to help UMAR

increase its visibility (L. Brennan, personal communication, 2011).

Upon narrowing the publics into target groups for this campaign, four publics were identified as most important; including: 1) family members of UMAR's program participants, 2) UMAR employees, 3) social media users, and 4) church members in Charlotte and surrounding regions.

Family Members of Program Participants

Families do not pay any fees to UMAR for their program membership, but they are an important funding source for the organization. Even though many UMAR families are of low to modest income level, this public provides about a third of UMAR's total funding from donations. Among the more affluent family members, three are on the UMAR board. (L. Brennan, personal communication, November 30, 2011).

As UMAR continues to grow, attentiveness to the well-being of its participants remains priority. Many of UMAR program participants receive constant care and support from their family members, while others must live long distances from their loved ones. Either way, these family members play an active role in the life of UMAR participants. They understand the struggles and challenges of living with DD. The family members place tremendous trust in UMAR and its ability to provide appropriate care to the individual. Of the program participants that do have a living parent, 25 percent of the parents live in another state or more than 90 minutes away from their child (M. Garner, personal communication, October 6, 2011).

UMAR strives for an independent lifestyle for its program participants. Family members often must take a back-seat role in the daily lifestyle of participants. However, UMAR prioritizes keeping the family members involved in the day-to-day activities of participants. Garner said, "Families of UMAR program participants are always welcome to participate in any of the activities in which their loved one is involved" (personal communication, October 6,

2011).   UMAR needs to maintain that connection with family members in order to foster

development and growth for the organization. Although family members may not always live

close to UMAR, there are means of communication available for them. UMAR invites family

members to special events hosted in their areas, such as fundraising luncheons in Winston-

Salem, Charlotte, and Highpoint. Twice a year, UMAR's President holds parent meetings in

Hayesville, Asheville, Winston-Salem, Greensboro, and Charlotte. During these meetings,

family members can learn about UMAR's programs, ask questions, and meet UMAR's leaders.

It is important that this public sustain two-way communication with the organization (M. Garner,

personal communication, October 6, 2011).

UMAR Employees

UMAR employees are another prime public. They devote their time, energy, and skills to

UMAR participants every day. These individuals have endured rigorous background checks and

interviews for their position on the UMAR team. UMAR employees are the face of the

organization, and must therefore demonstrate everything for which it stands. The employees

share common wishes they hope to see UMAR reach. (M. Garner, personal communication,

October 6, 2011).

Employee training is based on the level of care provided, the level of interaction with

participants, and nature of the work. Those providing care in group homes are trained in CPR,

medication administration, emergency response, and HIPPA privacy laws. Development staff

are trained in graphic design and fundraising. All staff members are continually updated on

relevant state, local, and federal regulations (L. Brennan, personal communication, November

30, 2011).

This public is a priority because of their constant connection with the participants. They witness first-hand the daily challenges of these individuals. Garner said, "Our staff provide direct care and work with program participants every day. Their focus and concerns are more centered on daily operations such as work, doctor appointments, dispensing daily medicine, providing meals, etc." (personal communication, October 6, 2011). The daily routine of the employees is often chaotic and requires extreme patience. Demonstrating this hectic lifestyle to those less informed would allow the community to better understand UMAR and its goals (M. Garner, personal communication October 6, 2011).

UMAR employees are the organization's backbone and its main connection to the participants. They must be involved in its future development and changes that take place within and throughout the organization. Employee compliance is of utmost importance to the success of this campaign (M. Garner, personal communication, October 6, 2011).

Social Media Users

Social media is significantly altering the way the world communicates, making its users a key public for UMAR. Social media networking sites such as Facebook and Twitter are ubiquitous in both the personal and professional worlds. As of 2011, there are over 500 million active Facebook users in the world. Approximately 28 percent of 18 to 34-year-olds visit their Facebook profile before they even get out of bed each day (Digital Buzz, 2011). Twitter is also on the rise, with currently over 250 million users. Networking sites such as Facebook and Twitter are free and open to anyone. This accessibility results in participants of all incomes, ages, genders and socioeconomic status (Digital Buzz, 2011).

Social media offers non-profit organizations a cost-effective opportunity to connect with and influence millions of people instantly (Martinage, 2011). According to Gass and Seiter

(2011), social media is a type of "buzz" or "viral" marketing that has become a vital component to any marketing or public relations effort. Buzz marketing operates when someone sees an idea online or hears about it through word of mouth, and then proceeds to tell others about it. The idea eventually becomes self-perpetuating. This tactic succeeds because it appears to be genuine and authentic as opposed to manufactured (Gass and Seiter, 2011).

Through social media, UMAR can affordably reach a large, diverse public. Increasing social media usage would help UMAR spread its mission within a limited annual budget. It is important for UMAR's followers on Facebook and Twitter to receive a clear view of what and who is important within the organization. For UMAR, social media can be an exceptional tool for fundraising, cultivating awareness, and receiving feedback (L. Brennan, personal communication, September 16, 2011).

A year ago, the UMAR Facebook page had about 125 "likes." Brennan implemented UMAR's first Facebook challenge with the goal of raising the number to 600 friends. Anyone who gets 50 friends to "like" UMAR wins a $25 gift card or lunch with the organization's President (L. Brennan, personal communication, September 16, 2011). Currently UMAR has about 519 "likes" (UMAR, 2011b). UMAR also has 190 followers on Twitter (UMAR 2011a). UMAR's social media followers primarily include friends and family of UMAR staff and residents. Demographically, they are of varying ages, predominantly reside in the Charlotte area, and are mostly Caucasian. (L. Brennan, personal communication, November 11, 2011).

Social media allows for effective two-way communication between organizations and key publics (Martinage, 2011). The majority of people interacting with UMAR have keen interest in learning more about UMAR's services or about DD in general. Thus, social networking sites allow UMAR to disperse information and respond to feedback from people who

may be potential supporters for the organization (L. Brennan, personal communication, September 16, 2011).

Church Members of All Faiths

Church members representing all faiths are another prime public for UMAR. Historically, members of the United Methodist church have largely supported UMAR. It was founded by the Methodist church and financed by its congregations. Today, its members are still actively involved with UMAR and its participants. They host dinners, visit UMAR group homes to make repairs and clean, hold bake sales to raise funds for the organization, and take participants on excursions such as church activities, bowling, movies, and sports events (L. Brennan, personal communication November 30, 2011).

Church members of other faiths could possibly have a tremendous effect on UMAR and its finances as well. In the Charlotte and surrounding areas there are over 1,300 churches, with an average of 150 members each (USA Church, 2011). Fifty percent of residents in Charlotte are religiously affiliated, with only 14 percent being Methodist. Churches typically consist of families with different socioeconomic backgrounds. There are single and married couples, small and large families, as well as people of different races and ages (Charlotte, 2009). Charlotte city statistics were collected to better understand populations affiliated with local church communities. This research was done to determine the scope of various church affiliations represented in Charlotte. The data is as follows: 22.5 percent are affiliated with Southern Baptist Convention, 17.8 percent Catholic Church, 14 percent United Methodist Church, 12.5 percent Presbyterian Church, 3.6 percent American Baptist Church, 2.8 percent Episcopal Church, and 2.3 percent Muslim (City Data, 2009).

While members may practice different religions, they share commonality through attending services, giving monetary donations, and expressing interest in supporting their community. This public is well-positioned to support UMAR with volunteers, jobs, or donations. Therefore, church members of all faiths in Charlotte and surrounding regions are a tremendously important public to address in this campaign (M. Garner, personal communication, October 7, 2011).

Church members of various faiths traditionally want to achieve perfection, spirituality, and understanding. Campaign efforts could address how these needs may be met through helping organizations such as UMAR. Because members of churches are generally interested in their community, they are likely to be open to hearing about UMAR and ways they can assist the organization. Many church members meet on a weekly basis, providing ample communication opportunities. Attending church services to speak about UMAR may be an effective way to reach this public (M. Garner, personal communication, October 7, 2011). Because the Methodist Church founded UMAR, its local members are already large supporters of the organization. However, members of other churches and faiths are not as familiar with the organization. Some of them may even steer away from UMAR due to its association with the Methodist Church (M. Garner, personal communication, September 12, 2011). By targeting additional faiths, UMAR could potentially increase its revenue, volunteer base, and employment opportunities for residents (M. Garner, personal communication, October 7, 2011).

Church groups have one dominant leader (pastor, priest, reverend, bishop, etc.) who they look to for guidance and advice. Communication with those leaders can be an effective way to inform members about UMAR and ways they can help the organization. Many churches are now using social media sites like Facebook and Twitter to advertise and share information with other

members and publics. In the future, those media outlets can also be used to share information

with members. Since members are familiar with those social networking sites, they are more

likely to accept information coming from those sources (M. Garner, personal communication,

October 7, 2011).

Goals and Objectives

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<div align="center">Goals and Objectives</div>

Additional Research

Funding is an ongoing concern for UMAR and must be addressed in this campaign. Two

publics are of particular interest as donors, due to their close ties to the organization and its

mission: family members of UMAR program participants and church members. According to

Garner, 31 percent of donations came from UMAR family members in the last fiscal year, which

the organization hopes to raise to 33 percent. Regarding church members, Garner would like to

see donations increase from 21 percent to 33 percent of total donations (M. Garner, personal

communication, October 26, 2011).

Goals and Objectives

Based on four strategic publics, UMAR family members, church members of all faiths,

social media users, and UMAR employees, the following goals and objectives were identified.

Goal 1: To increase the visibility of UMAR among local church members
- O1: To have an effect on the awareness of members of other faiths; specifically to increase their knowledge of UMAR from 15% to 20% within six months, then to 30% within the following six months. These numbers are based on UMAR staff descriptions of the current level of involvement by all church members in the area (M. Garner, personal communication, October 7, 2011), taking into account the actual percentage of United Methodist members in Charlotte (City Data, 2009).

- O2: To have an effect on the action of members of other faiths; specifically to increase their number of volunteers from 300 to 340 within six months, then to 400 within the following six months (L. Brennan, personal communication, September 16, 2011).

Goal 2: To rebrand UMAR

- O3: To have an effect on the awareness of UMAR employees; specifically to increase their understanding of UMAR's branding message from 0% to 40% within six months, then to 90% within the following six months. The zero percent indicates that UMAR has no clear branding message at this time. Management wishes to create one that will be adopted by the entire staff. While 100 percent is an unrealistic undertaking, it is feasible to achieve high percentages with a staff of UMAR's size. This explanation applies to the following two objectives as well (L. Brennan, personal communication, September 16, 2011).

- O4: To have an effect on the acceptance of UMAR employees about branding; specifically to increase their interest in creating a branding message that will be consistently repeated from 0% to 40% of UMAR employees within six months, then to 90% within the following six months (L. Brennan, personal communication, September 16, 2011).

- O5: To have an effect on the action of UMAR employees; specifically for them to advocate a unified branding message that will be understood by others from 0% to 30% within six months, then to 80% within the following six months (L. Brennan, personal communication, September 16, 2011).

Goal 3: To increase UMAR's revenue from donations

- O6: To have an effect on the action of UMAR family members; specifically to increase their donations from 31% to 32% of total donations within six months, then to 33% within the following six months.

- O7: To have an effect on the action of members of other faiths; specifically to increase their donations from 21% to 25% of total donations within six months, then to 31% within the following six months (M. Garner, personal communication, October 26, 2011).

Goal 4: To increase visibility of UMAR among social media users

- O8: To have an effect on the action of social media users; specifically to increase the number of UMAR Facebook likes from 514 to 700 within six months, then to 1,000 within the following six months (UMAR, 2011b).

- O9: To have an effect on the action of social media users; specifically to increase the number of UMAR Twitter followers from 190 to 300 within six months, then to 510 within the following six months (UMAR, 2011a).

Tactics

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Tactics

Key Message

The key message for this campaign is, "UMAR promotes a diverse population of adults with developmental disabilities (DD) to be active members of the local community." This message is designed for the overarching purpose of this campaign, which is to attract a broader base of support to UMAR by appealing to a diverse range of publics. As mentioned many times in this report, funding is an ongoing concern for UMAR, so gaining more support in the form of donors and volunteers is paramount. The biggest challenges are finding a way to involve the whole community and showing that UMAR is not just for United Methodist members, while maintaining close ties to the United Methodist Church. With these ideas in mind, the campaign intends to rebrand the organization (L. Brennan, personal communication, September 16, 2011).

The most critical part of rebranding the organization is creating one succinct and consistent way to describe UMAR that can be adopted by everyone involved. Therefore, the key message must not be modified for any publics. The language of this message is carefully crafted to align with the mission, without simply restating the mission. Rather, this message is designed to be a catchier, more concise version of the mission. The campaign and branding messages (including the new name and slogan below) make use of both rational and emotional appeals through powerful keywords and concepts. The keyword "diverse" emphasizes that UMAR invites participation from the entire community and that it serves many people who are not affiliated with the United Methodist Church. The keyword "active," is intended to appeal to a younger audience, and to emphasize that UMAR participants give back to community. The keyword "promote" suggests that UMAR empowers its participants, rather than merely supporting them. Another important aspect of rebranding the organization is adopting a new

name and slogan that can appeal to a more diverse population in accordance with the key

message. The new name and slogan is presented below.

UNITE

UNity.Inclusion.Teamwork.Enrichment

"We are all united"

The name and slogan serve as a reference to the United Methodist Church (through the

word "unite"), but is not an overwhelmingly obvious reference because it also represents other

ideas. *Unity* signifies that the organization helps adults with DD to have their own community

and support base, that it unites participants with the larger community, and that it unites people

of diverse backgrounds. *Inclusion* represents a major focus of the organization, to help adults

with DD be active members in society. *Teamwork* is a critical concept to the organization, as

something that is incorporated into all activities. UMAR participants are encouraged to work as

part of a team in numerous endeavors, such as living with roommates, employment, group art

projects, and Special Olympics. Teamwork facilitates the sense of unity and inclusion for which

the organization strives. And finally, *Enrichment* is an important concept because enriching the

lives of those with DD is the fundamental reason for the organization's existence (L. Brennan,

personal communication, September 16, 2011).

The catchphrase, or slogan, "We are all united" has a double meaning. The word

"united" is a reference to the United Methodist Church, at the same time indicating that the

organization joins people of all faiths. Second, the catchphrase refers to another concept that the

organization emphasizes heavily, that those with DD are not so different from the rest of us.

This concept is reflected in the catchphrase, articulating that we are all united as human beings

(L. Brennan, personal communication, September 16, 2011).

Rebranding

       Rebranding tactics are focused on adopting key messages consistently among UMAR

employees, and disseminating those messages to all its publics. The new name for UMAR must

be established in all print and electronic media. First, a meeting should be called for all current

UMAR employees to discuss the new brand name and slogan. UMAR board members can

present the new branding messages, while detailing the impact and importance of a centralized

message for the organization and how its influence can create a cohesive meaning. Next, emails

and newsletters about the rebranding must be sent to all employees, volunteers, donors, family

members, and anyone else on the organization's mailing lists. To disseminate the message

publically, a press release would be sent out to all relevant media outlets regarding the name

change and the reasons behind this action. Business cards, brochures, websites, banners, signs,

and all other printed and electronic marketing materials must be changed to display the new

name and logo.

       UMAR employees must not only understand the message of unity but also act upon it.

Providing UMAR employees with updated information about the organization and its

participants on an ongoing basis would allow them to feel more "united" and cohesive as a team.

The UMAR newsletter must regularly include an activities calendar, descriptions of new

members, participant artwork, and acknowledgments. Employees may have access to

information through the UMAR website, emails, and newsletter articles regarding the progress of

other key publics such as local church members, social media users, and donors. These tactics

make use of controlled organizational media.

Social Media

Using social media as a tool to monitor UMAR's publics is a valuable public relations

tactic. Facebook allows UMAR to determine demographic data from fans' profiles. UMAR can

gauge where it needs to improve its presence geographically, which ages and genders to focus

on, etc. To actively engage those who are following UMAR on social networking sites, and

attract new followers, UMAR can strive to make its page more informative and interactive.

Social media offers the ability to market events and campaigns virtually for free. UMAR

can post dates of fundraising events, new services, and other announcements. It is also vital that

Facebook users have an idea of who is actually posting to the UMAR site. Brennan primarily

controls information that is posted to the organization's Facebook page (L. Brennan, personal

communication, September 16, 2011). It would be beneficial for UMAR to include a brief

message that Brennan has directed to those interested in the organization, as well as her picture.

For instance, she could say, "Hi, my name is Lena, and I control the social media at UMAR.

Please feel free to look around our page, and let me know if you have any questions. I have been

working with UMAR for a year and half, and love the opportunity to bring the best services for

adults with DD to your area."

In order to deliver more valuable and meaningful key messages to this public, UMAR

can strive to appear more professional and legitimate on social media. UMAR is currently using

the standard background on its Twitter account. They should consider updating their Twitter

background to one that is more personalized. UMAR's logo, a picture from an event, or an

original UMAR artwork would all serve this purpose. Followers should be able to see a picture

and brief description of the UMAR staff member who is tweeting. Brennan could include that

she has been with the organization for a year and a half and that she presides over social media.

She could also provide the direct link to UMAR's website, and include that she could be directly messaged on Twitter if anyone has a private question or concern about the organization. Allowing users to see who is actually responding to their messages may enhance trustworthiness and credibility for the organization.

UMAR can build relationships by actively replying, retweeting, and joining discussions in which its participants are engaging. This will help UMAR deliver accurate responses to questions about the organization. It also demonstrates that UMAR cares about its publics. UMAR can empower its followers with concrete information in support of its mission through pictures and links to UMAR's main website.

Church Participation

Church members are an important focus of the UMAR campaign. Working through a controlled media outlet would allow UMAR to articulate its message in a way that is tailored to the church member public. A targeted electronic media approach would be producing a YouTube video that portrays UMAR participants in their daily lives, including worship service on Sundays. Another tactic would be to have UMAR employees and volunteers visit numerous local churches of different faiths to speak to the congregations, distribute brochures, and recruit volunteers. Whenever possible, they should bring UMAR participants to meet the church members. These tactics can demonstrate to the church audience how assimilation into society for adults with DD is an important step forward.

Generating Donations

It is crucial to spread the campaign's key messages to both current and future donors. People spending money on UMAR must be able to easily relate with a spokesperson. As Development Manager, Brennan would be an ideal spokesperson for this campaign. Brennan

has received her Master's Degree in journalism, and has been with UMAR for a year and a half (L. Brennan, personal communication, September 16, 2011). She embodies professional appeal while maintaining a charismatic demeanor.

In newsletters and brochures that are distributed to donors, it would be beneficial to include a brief description from Brennan about why she loves representing UMAR. Due to budget restraints, UMAR may not be capable of having commercial advertisements on television. However, the organization can create informative videos for donors and post them on UMAR's website, YouTube, Facebook, and Twitter.

Families affected by DD are a key public for UMAR and provide a major source of its donations (M. Garner, personal communication, October 26, 2011). To ensure that this public is receiving accurate messaging, UMAR can send emails and copies of newsletters that include information about how their donations are being used by organization. UMAR could also hold regular luncheons with UMAR family members to connect with them on a personal level.

Since church members are another major source of donations for UMAR (M. Garner, personal communication, October 26, 2011), tactics described in the "Church Participation" section will also serve to increase revenue from church donations. As spokesperson, Brennan should be the primary employee to make church presentations whenever possible.

Timeline

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Timeline

Create and deliver new logo, newsletters, business cards, and press releases on the change of UMAR to UNITE by January 15.

January 9: Release press release to local media (Lena Brennan)

January 6: Finalize press release (Lena Brennan)

January 5: Deliver to the post office (Lena Brennan)

January 4: Attach address labels (UMAR employees)

January 3: Draft e-mailing list of local and surrounding media (Lena Brennan)

January 2: Receive from printer, create pdf version of newsletter; distribute cards (Lena Brennan)

December 20: Draft contact list of current UMAR donors, volunteers, and employees (Marilyn Garner)

December 19: Deliver newsletter and card design to printer (Lena Brennan)

December 16: Obtain approval for all publication (Lena Brennan)

December 15: Complete draft; include copies of all publications and artwork (Lena Brennan)

December 12: Begin writing press releases and newsletter, create new logo (Lena Brennan; outsourced)

December 9: Distribute design and writing duties (Lena Brennan)

December 8: Obtain approval for objectives, determine budget (Lena Brennan, Teran Morrow)

December 6: Draft duty distribution (Lena Brennan)

December 5: Begin planning for newsletter, logo, cards, and press releases (Lena Brennan)

Goal: Update UMAR's Facebook and Twitter page by January 1.

December 21: Create schedule to ensure Twitter is always updated (Lena Brennan)

December 20: Assign permanent "tweeters" and "responders" (Lena Brennan, Marilyn Garner)

December 19: Change background of Twitter account (Lena Brennan)

December 18: Obtain approval of logo for Twitter account (Lena Brennan)

December 15: Draft logo for Twitter account (outsourced)

December 14: Create timeline for regular future updates (Lena Brennan)

December 13: Update Facebook with information, upcoming events, recent photos (Lena Brennan)

December 9: Collect information for Facebook bio (UMAR employees)

December 7: Distribute Facebook and duties (Lena Brennan, Marilyn Garner)

December 6: Obtain approval for objectives and duty distribution (Lena Brennan)

December 5: Brainstorm background ideas for Facebook; draft duty distribution (Lena Brennan)

Create YouTube video to educate UMAR's services by January 15.

January 15: Show video in scheduled churches (Lena Brennan, Ruby Mossor)

January 5: Obtain approval of video (Lena Brennan)

December 28: Obtain final edit of video (Lena Brennan)

December 27: Call churches; Arrange date for viewing January 15 (Ruby Mossor)

December 23: Draft contact list for churches to visit (Ruby Mossor)

December 20: Put together footage (Lena Brennan)

December 11: Video shoot day (UMAR employees)

December 10: Video shoot day (UMAR employees)

December 9: Draft script (Lena Brennan)

December 6: Obtain approval for objectives and duty distribution (Lena Brennan)

December 5: Brainstorm ideas for video; outline plan; draft duty distribution (UMAR employees)

Budget

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Budget

<u>Fixed Budget for Newsletter</u>

Setup Costs (in-**house)**………………………………………………...………………….**$0**

Artwork…………………………………………………………………………….....$0

Production Costs (outsourced) x 800 copies……………………………………..$205

Printing (color @ $.16)…………………………………………..…………………$128

Envelopes and Address Label……………………………………………………$77

Distribution Costs………………………………………………………………$212

Non-mail/bulk-mail distribution (@ $0.265)………………………...…………….$212

TOTAL…………………………………………………………………………$417

<u>Fixed Budget for Logo, Copyright and Business Cards</u>

Set Up Costs………………………………………………………………......$585

Logo Design……………………………………………………………..……….$500

Copyright…………………………………………………………………….…$85

Production Costs x 5,000

Copies…………………………………………………...…………………...$81

Business Cards…………………………………………………………...……..$82

TOTAL…………………………………………………………….……$667

CAMPAIGN TOTAL…………………………………………………..$1084

Evaluation

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Evaluation

Goal: Local Church Members/ Increasing Visibility

1. To have an effect on the awareness of members of other faiths; specifically to increase their knowledge of UMAR from 15% to 20% within six months, then to 30% within the following six months. These numbers are based on UMAR staff descriptions of the current level of involvement by all church members in the area (M. Garner, personal communication, October 7, 2011), taking into account the actual percentage of United Methodist members in Charlotte (City Data, 2009).

> o   Evaluation Technique: Using a message exposure technique, researching how many of those church members were satisfied with the message UMAR was sending and how it was presented.

> o   This technique would provide information to UMAR that would supply helpful information when planning the content of the message and which key words would benefit the appropriate public.

2. To have an effect on the action of members of other faiths; specifically to increase their number of volunteers from 300 to 340 within six months, then to 400 within the following six months (L. Brennan, personal communication, September 16, 2011).

> o   Evaluation Technique: Compare feedback from church audience members to prior appearances. Within six months review how many of the members have contacted UMAR via email or directly.

> o   This will allow UMAR staff to gauge how quickly it receives responses along with how many church members response to its message.

Goal: The Rebranding of UMAR

1. To have an effect on the awareness of UMAR employees; specifically to increase their understanding of UMAR's branding message from 0% to 40% within six months, then to 90%

within the following six months. The zero percent indicates that UMAR has no clear branding message at this time. Management wishes to create one that will be adopted by the entire staff. While 100 percent is an unrealistic undertaking, it is feasible to achieve high percentages with a staff of UMAR's size. This explanation applies to the following two objectives as well (L. Brennan, personal communication, September 16, 2011).

- o   Evaluation Technique: Provide an open discussion forum for all UMAR employees to contribute to for further questions or explanation on a specific change.

- o   This evaluation technique will provide an opportunity for UMAR employees to feel organizational connection. It will bring about growth within UMAR and how organizational change is made.

2. To have an effect on the acceptance of UMAR employees about branding; specifically to increase their interest in creating a branding message that will be consistently repeated from 0% to 40% of UMAR employees within six months, then to 90% within the following six months (L. Brennan, personal communication, September 16, 2011).

- o   Evaluation Technique: Document statistically, how quickly UMAR employees adapted the new branding message and how eager they are to assist in the distribution of that message, by providing a survey prior to the message being presented and a survey after to UMAR employees.

- o   By allowing UMAR employees to survey their satisfaction with the message and their willingness to accept the message, UMAR will be able to build future organizational changes, according to employee acceptance levels.

3. To have an effect on the action of UMAR employees; specifically for them to advocate a unified branding message that will be understood by others from 0% to 30% within six months, then to 80% within the following six months (L. Brennan, personal communication, September 16, 2011).

- o   Evaluation Technique: Have UMAR employees visit the surrounding community advocating for UMAR and the new message. Allow those audience members to report their eagerness to contribute or become a part of the UMAR team. Document, monthly, the number of new donors or volunteers.

- o   This will measure the effectiveness of the UMAR message. It will also measure how well the employees understand and promote UMAR and its services.

Goal: Increase Revenue From Donations

1. To have an effect on the action of UMAR family members; specifically to increase their donations from 31% to 32% of total donations within six months, then to 33% within the following six months.

> o   Evaluation Technique: Record, annually, how often UMAR family members donate to the organization and how much they donate.

> o   This will measure how much of the donations are generated from family members. If the numbers are high, then focus your message around those family members and allow them the opportunity for involvement within UMAR and with changes are made.

2.   To have an effect on the action of members of other faiths; specifically to increase their donations from 21% to 25% of total donations within six months, then to 31% within the following six months (M. Garner, personal communication

> o   Evaluation Technique: Review the percentage of donations generated from members of other faiths. Review how many appearances are made throughout the year to other churches besides the United Methodist. From those appearances, document how many audiences members contacted UMAR and were interested in donating.

> o   This will allow UMAR to determine what percentages of donations are contributed by other faiths.

Goal: Increase Visibility Among Social Media Users

1.   To have an effect on the action of social media users; specifically to increase the number of UMAR Facebook likes from 514 to 700 within six months, then to 1,000 within the following six months (UMAR, 2011b).

> o   Evaluation Technique: Provide an option for the viewers of the Facebook page, that when an individual "likes" UMAR, they will be directed toward a website that allows them to gauge how likely they are to donate or volunteer at UMAR.

> o   This will demonstrate how persuasive UMAR's Facebook message is to its viewers and how likely they are to act upon it.

2. To have an effect on the action of social media users; specifically to increase the number of UMAR Twitter followers from 190 to 300 within six months, then to 510 within the following six months (UMAR, 2011a).

       o   Evaluation Technique: Let interest followers know that if they follow UMAR on Twitter, then UMAR will follow them back.

       o   This will show that UMAR cares about each individual interested in the organization, and that the organization took the time to follow him or her back.

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Appendix

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