

**Community Foundation of Middlesex County
Marketing & Communications Committee**

To: Marketing and Communications Committee

[Susan Daniels, Donna Lee Gennaro, Tom Gezo, James Gomes, Sarah Wadle, Deborah Moore [ex-officio],
Cynthia Clegg, Thayer Talbott]

From: Greg Rainey and Brian Abely, Co-Chairs

Agenda

Monday, January 28, 2019

8:30 a.m.

**Community Foundation of Middlesex County
49 Main Street, Middletown**

- A. Call To Order**
- B. Approval of Minutes of October 15, 2018 (Attached)**
- C. 2019 Marketing and Public Relations objectives**
 - i. Donor Thank You Campaign**
 - ii. Round of Applause constant contact series**
 - iii. Fund/Grant stories and features**
 - iv. Other outreach initiatives**
- D. Other Business / Open Issues**
 - i. Donor survey**
- E. Adjourn**

If for any reason you cannot attend this meeting, please contact Thayer at 860-347-0025 or
Thayer@MiddlesexCountyCF.org. Thank you.

2019 Meeting Schedule:

- Monday, April 15
- Monday, July 22
- Monday, October 21

Attachments: *“Donors Make a Difference” charts*

2019 Marketing & Communications Overview and Plan

CFMC General Constant Contact Schedule

CFMC Strategic Plan 2017-2020

**Community Foundation of Middlesex County
Marketing & Communications Committee Minutes
49 Main Street Middletown, CT
October 15, 2018 8:30AM**

Present: Brian Abely (co-chair), Susan Daniels, Sarah Wadle (via telephone), Donna Lee Gennaro, Tom Gezo, Deborah Moore [ex-officio], Cynthia Clegg, Thayer Talbott
Absent: Greg Rainey (co-chair)

- A. Mr. Abely called the meeting to order at 8:32 a.m.

- B. **Minutes** of the July 23, 2018 meeting were unanimously approved on a motion duly made by Mr. Gezo and seconded by Ms. Daniels.

- C. **2018 Goals and Objective:**
 - a. **2018 Communications and 2019 Planning:** The Committee discussed the various outreach methods used by CFMC during 2018 and the efficacy of each method. Discussion centered on the nature of relationship building and the many types of contact and outreach that occurs by CFMC volunteers and staff. Tracking specific entry points is not simple as many donors may have had several contact points with CFMC prior to a first gift. Therefore the focus of raising visibility and creating opportunities to learn more about CFMC continues to be a primary goal of communications plans. It is important to continue building on the importance of trust in relationships within the community. The Committee discussed goals for 2019, including growing the endowment, particularly unrestricted funds; raising awareness of CFMC's ability to assist in all types of charitable giving; and continuing to develop relationships which include establishing funds and considering legacy giving to CFMC.

The Committee discussed several ways in which community members can be encouraged to learn more and get more involved, including developing a more robust email database for both general information and specific interest areas, such as giving categories and towns. This will aid CFMC in targeting certain stories, events, and outreach opportunities based on donor/prospect interest. The Committee also discussed including more targeted "calls to action" tied to stories and events. This will encourage recipients to consider donations as well as getting more involved. The Committee suggested developing a series of informational stories for each town, highlighting CFMC's involvement in that town, as one way to increase awareness and encourage individuals to be ambassadors on CFMC's behalf. The Committee agreed a simple and short survey to donors would help identify trends and interests. Mr. Gomes stated he would work with staff to develop a simple question that can be sent out via the email platform and included on the website.

 - b. **Days of Giving Campaign:** CFMC will launch the Days of Giving Campaign again this year, beginning in mid-November and ending in early December. The pages are being reviewed for opportunities to provide more specific calls to action and to highlight "What Matters To

You.” The Committee suggested tying in suggestions for giving now as well as legacy opportunities and ways to think to the future of Middlesex County.

D. Other Business / Open Issues

a. 2019 Goals & Objectives

The Committee agreed that the primary goals for 2019 will continue to focus on

- Thanking donors for their support of CFMC and Middlesex County;
- Telling donor, fund, and grantee impact stories;
- Encouraging donors to consider CFMC as part of their legacy planning; and
- Continuing to raise awareness about the many ways CFMC supports individuals and communities so as to develop new audiences and relationships.

Stories, social media, columns, e-news, and some advertising will be the primary channels through which CFMC will communicate these items.

b.2019 meeting schedule

The Committee will continue to meet on a quarterly basis.

E. Adjourn

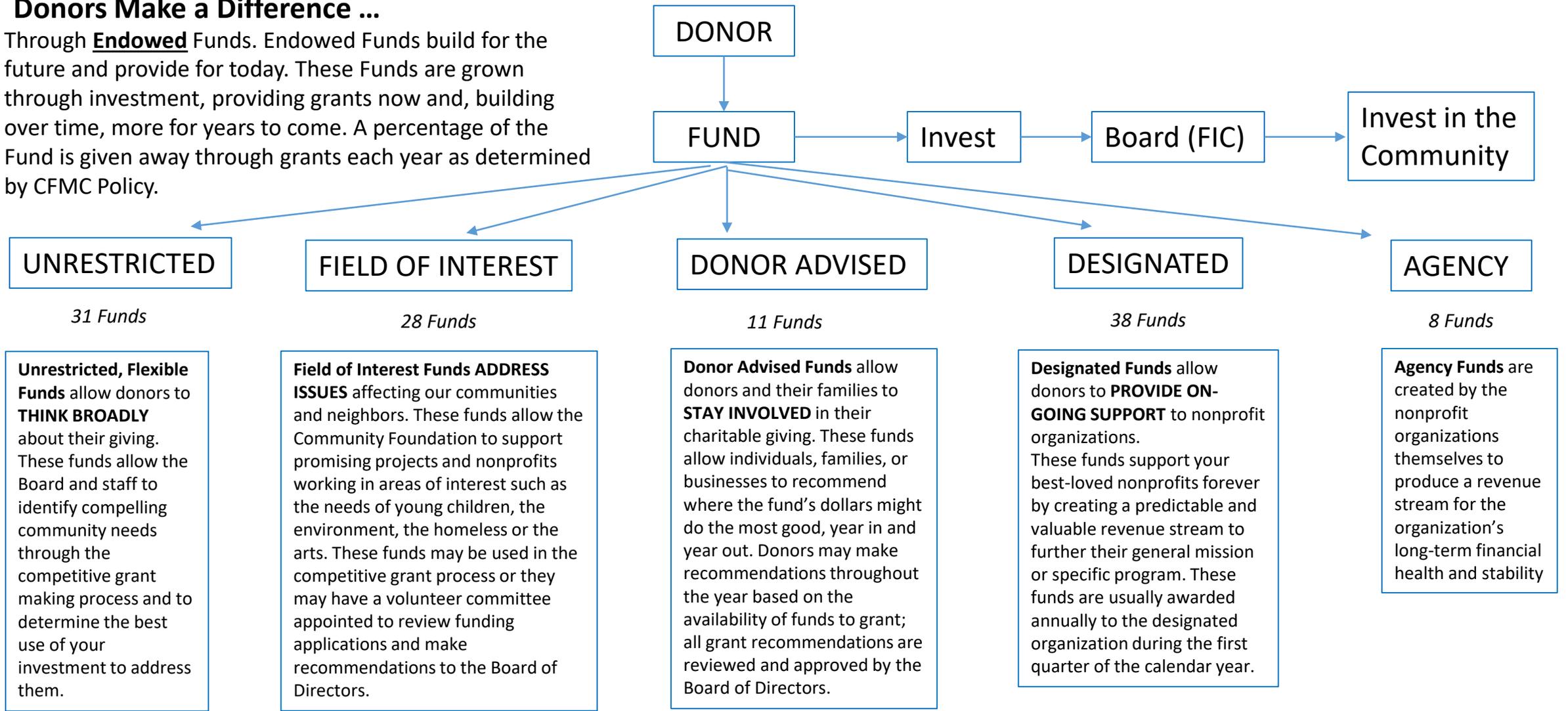
There being no further business, upon a motion duly made and seconded, the Marketing & Communications Committee unanimously VOTED to adjourn at 9:59 am.

Respectfully submitted,

Thayer Talbott

Donors Make a Difference ...

Through **Endowed** Funds. Endowed Funds build for the future and provide for today. These Funds are grown through investment, providing grants now and, building over time, more for years to come. A percentage of the Fund is given away through grants each year as determined by CFMC Policy.

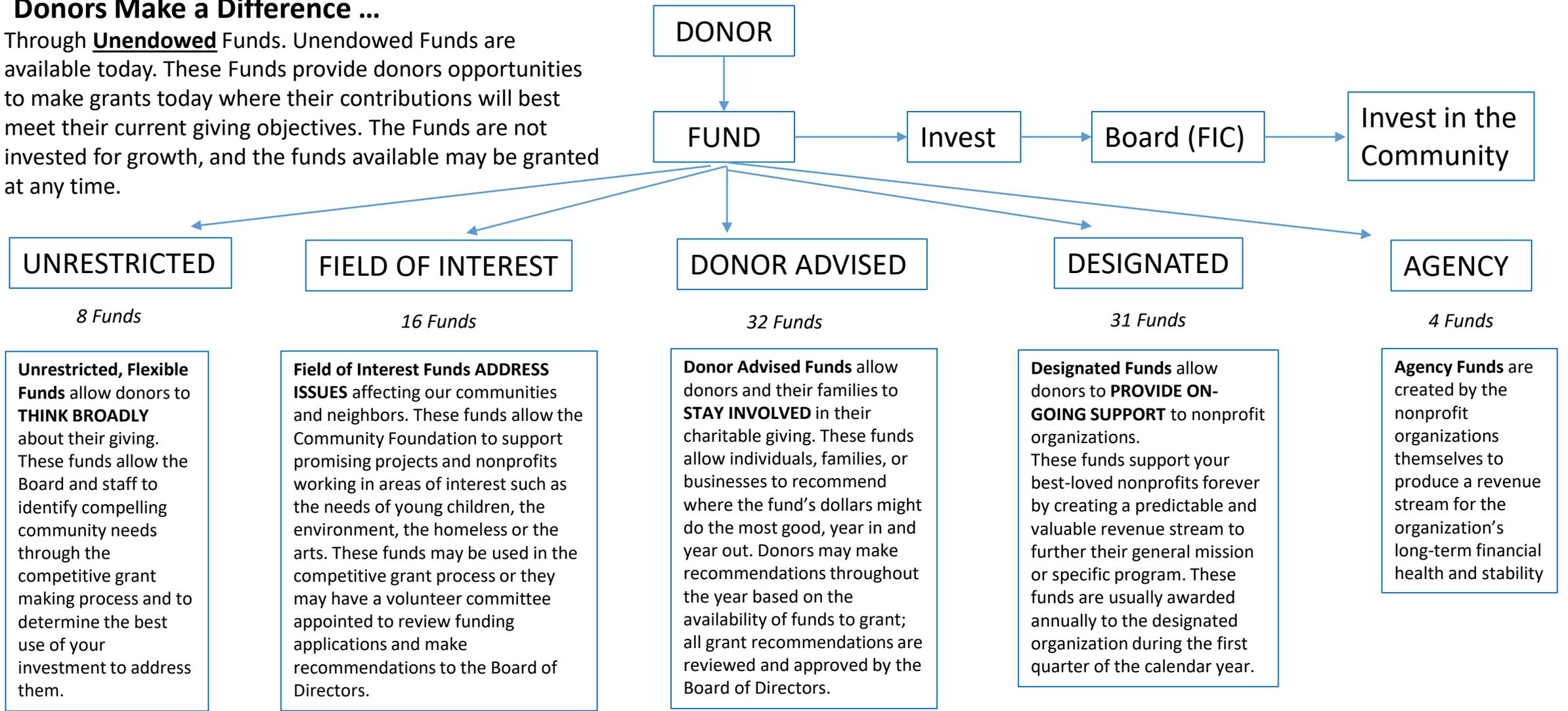


Additionally –

Geographic Affiliate (1 Fund) - empowering local groups of dedicated volunteer Advisors to support their community through grants for local programs and services.

Donors Make a Difference ...

Through **Unendowed** Funds. Unendowed Funds are available today. These Funds provide donors opportunities to make grants today where their contributions will best meet their current giving objectives. The Funds are not invested for growth, and the funds available may be granted at any time.



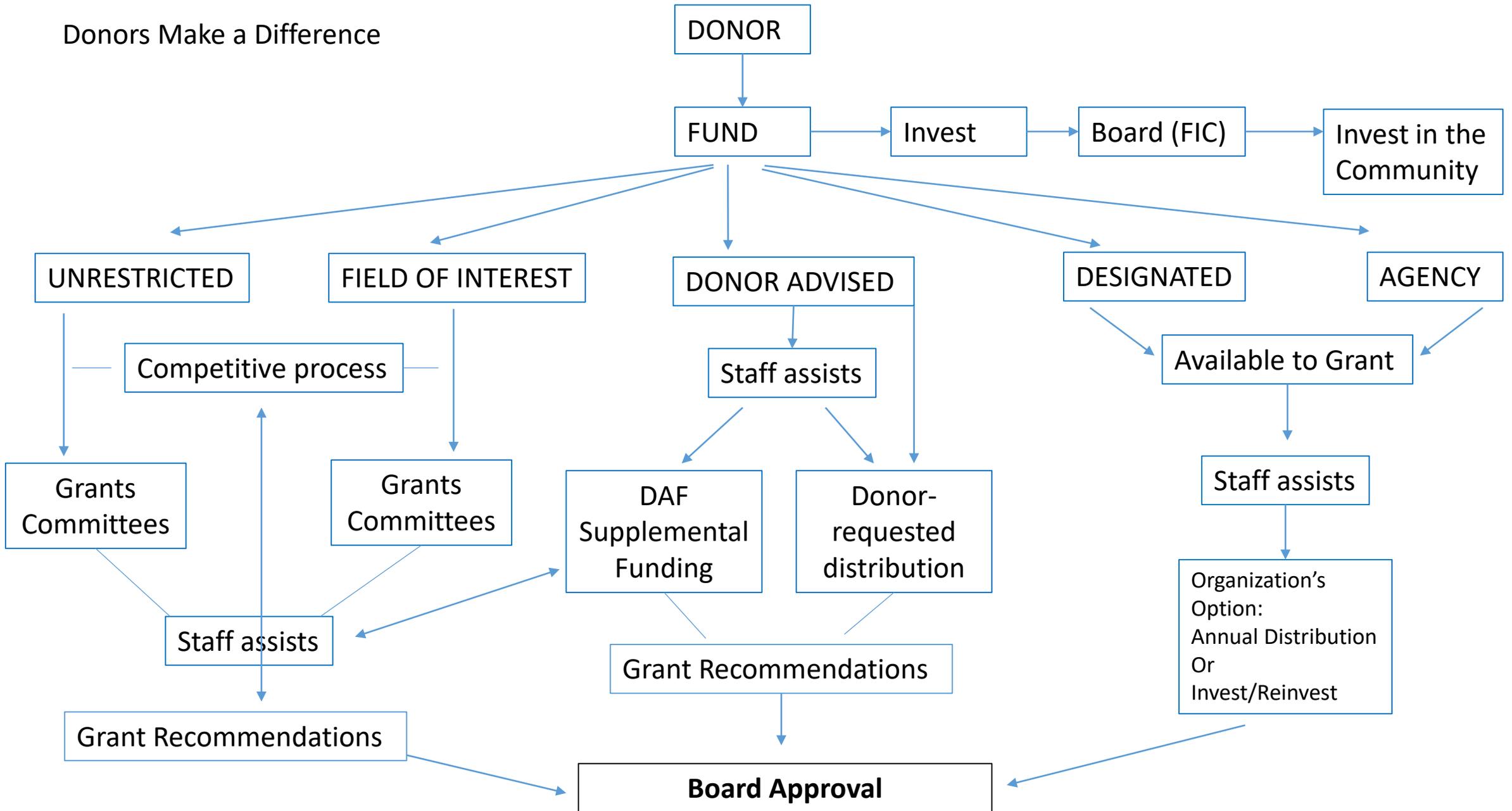
Additionally –

Project Funds (4 Funds) – community projects with a beginning, middle and end which can benefit from community donations.

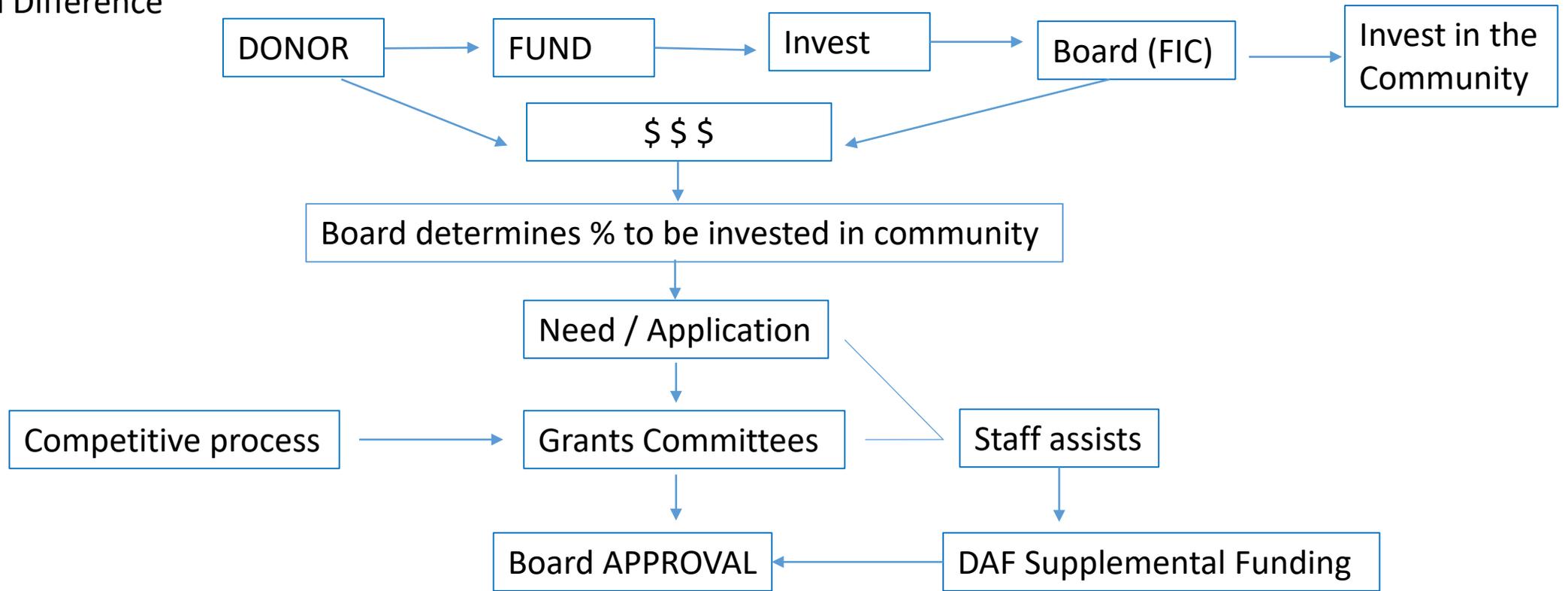
Fiscal Sponsorship (3 Funds) – programs/groups working toward their 501(c)3 status and need to accept donations prior to IRS determination.

Geographic Affiliate (1 Fund) - empowering local groups of dedicated volunteer Advisors to grow their community's endowment to support charitable programs and services in their town, now and forever.

Donors Make a Difference



Donors Make a Difference



Donor Advised Funds:

- Staff educates on need → Grant
- Donor requests distribution → Staff does due diligence → Grant (or another suggestion from staff)

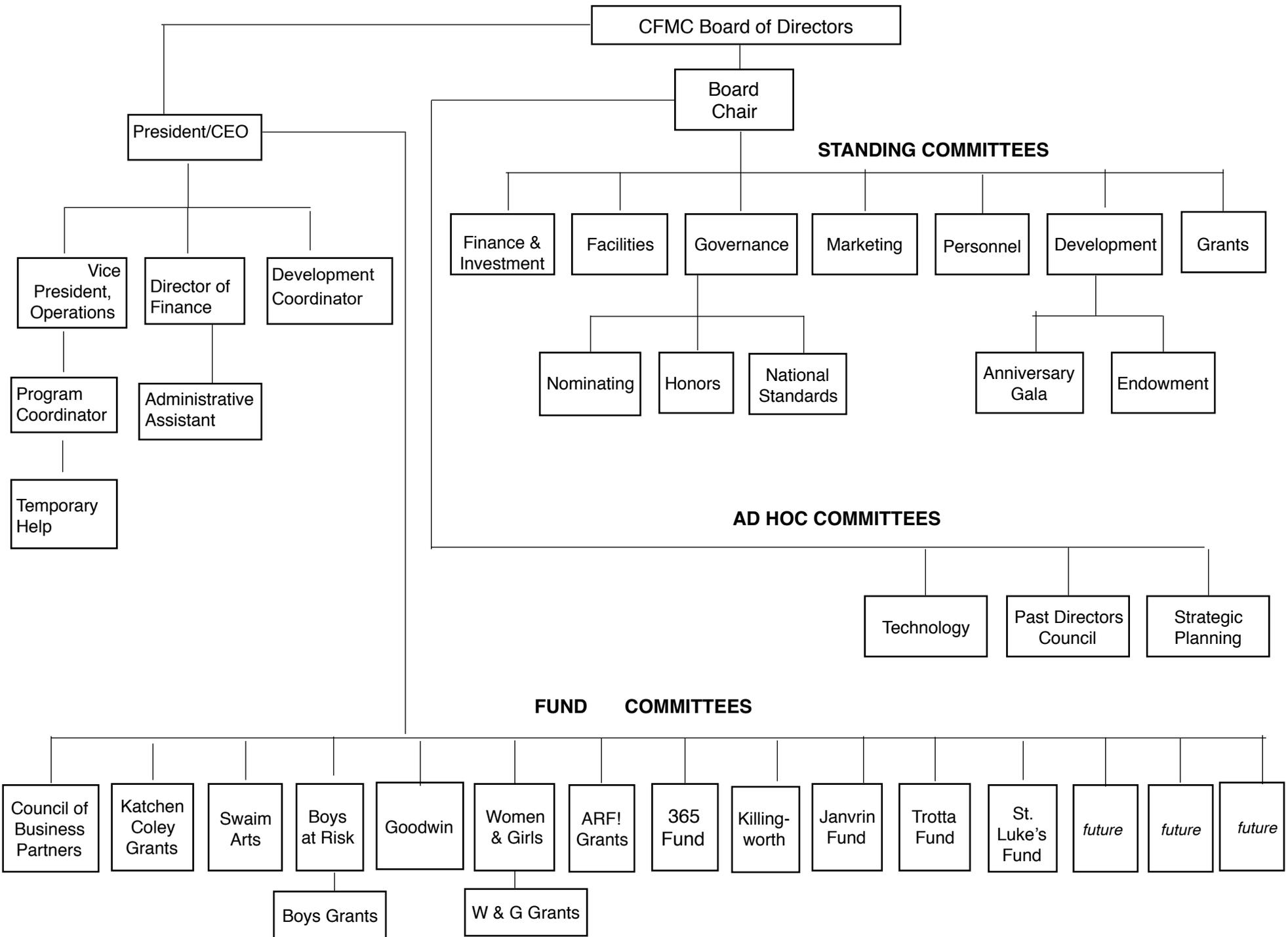
Designated Funds:

- Available to Grant → Invest/Reinvest or Distribution (staff assist)

Agency Funds:

- Available to Grant → Invest/Reinvest or Distribution (staff assist)

Board APPROVAL



**COMMUNITY FOUNDATION OF MIDDLESEX COUNTY
2019 MARKETING COMMUNICATIONS OVERVIEW**

EDITORIAL

Community Columns (monthly)

- Valley Courier/Harbor News
- The Chronicle
- East Haddam News/Haddam News

iCRV Radio - Feel Good Community Show (weekly)

Press Releases / Feature Stories

- 2018-2019 Grant Award Announcement (February)
- Leave A Legacy (June)
- Special Gifts / Fund Announcements / Recognition Awards (as needed)

PAID ADVERTISING / SPONSORSHIP

Events Magazines - Clinton, Chester, East Haddam, East Hampton, Essex, Haddam, Old Saybrook, Westbrook

Valley Courier - Essex, Chester, Deep River

Harbor News - Old Saybrook, Westbrook, Clinton

The Source - Killingworth

The Chronicle - Cromwell , Middletown

iCRV Radio –Streaming station with CT River Valley content

TBD Library / Town Newsletter Sponsorships in Middlefield, Durham, Portland

CFMC COMMUNICATIONS

Website

Enews

Facebook

Instagram

Annual Report

Thank You mailings

Appeal mailings

COMMUNITY FOUNDATION OF MIDDLESEX COUNTY
2019 MARKETING COMMUNICATIONS PLAN

PURPOSE: Focusing on CFMC’s role as the community’s partner in philanthropy, and building off the momentum created by the ongoing general awareness campaign, the following plan documents the goals, strategies, and communications platforms for efficiently and effectively delivering cohesive and consistent messages that target current and prospective stakeholders, and support the CFMC organizational objectives.

GOALS

1. Increase awareness of CFMC as a personable, local, philanthropic facilitator.
2. Increase support of CFMC programs and funds throughout the year.
3. Increase the number of CFMC donor-advised/general funds, charitable IRAs, and planned gifts.

STRATEGY

1. Tell the personal stories of how CFMC donors/funds have helped improve the quality of life for all.
2. Create continual exposure targeting people living and working in the towns of Chester, Clinton, Cromwell, Deep River, Durham, East Haddam, East Hampton, Essex, Haddam, Killingworth, Middlefield, Middletown, Old Saybrook, Portland, and Westbrook.
3. Reach and engage the general public, current CFMC stakeholders, business owners, and professional advisors.

MESSAGE PLATFORMS

1. Thanks to valued donors, nonprofit partners, and the local community at large, CFMC helps make great things happen.
2. CFMC connects valued donors with worthy causes.
3. CFMC makes it easy to *leave your personal, local legacy.*

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MARKETING TACTICS

Editorial

1. Develop monthly community column for the Valley Courier (Essex, Chester, Deep River), Harbor News (Clinton, Old Saybrook, Westbrook), The Chronicle (Middletown/Cromwell), and Haddam News/East Haddam News featuring CFMC donors/funds and nonprofit programs receiving grants in the key interest categories. (P-D)
2. Host/provide discussion topics and guests for weekly iCRV "Feel Good Friday" radio program. Focus on key areas of interest and feature CFMC donors/partners/board members whose stories illustrate how CFMC helps make good things happen in the local community. (staff)
3. Develop a relevant newsworthy "Leave Your Legacy" feature story. Distribute/pitch to all area newspapers, television, and radio stations in June during Leave a Legacy month. (P-D)
4. Develop and distribute general news releases, and feature stories, as appropriate, announcing major gifts, annual grants, recognition awards and other significant news. (P-D)

Sponsorship

1. Run ongoing 30 second sponsorship spots on iCRV radio. Create 3-4 different spots with CFMC/Donor/Partner representatives as the "voices" highlighting CFMC's role as a community partner and the resulting good things that are happening throughout Middlesex County.

Advertising

1. Run print/digital ads throughout the year in local media covering all Middlesex County towns, including Events Magazines, Valley Courier, Harbor News, The Source, and The Chronicle. Ad creative will underscore community partnership / celebration of donors and partners. (P-D)
2. Develop sponsorship/ad opportunities with public libraries or other similar organizations in towns where print advertising is not planned, specifically in Portland, Durham and Middlefield. (P-D)
3. Develop social media "post boosts" for various platforms to increase following and broaden CFMC audience. (staff)

Email

1. Develop and distribute monthly email messages similar in content to the print ad campaign. (staff)

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MARKETING TACTICS (continued)

Direct Mail

1. Develop personalized letters of thanks to donors outlining impact of their fund support. (staff)
2. Create invitation mailings for special events / annual fundraising events. (staff)
3. Develop and mail a holiday letter of thanks to CFMC donors/stakeholders. (staff)

Social Media

1. Share relevant CFMC news on FB, Twitter, Instagram on an ongoing basis. Post photos from events. (staff)
2. Promote CFMC social media by including Like Us on FB and Follow us on Twitter links in all e-news communications and social media icons on all print communications when appropriate. (staff)

Website

1. Update CFMC website on an ongoing basis with content featuring 2019 initiatives, new donor/fund stories, grant awards, non-profit organizational services, and all other relevant good news happening through CFMC. (staff)
2. Promote the website as a resource for learning more about the many ways to become a local philanthropist. (staff)

Annual Report

1. Write and design annual summary of organizational success stories and financial reports to be mailed to CFMC stakeholders and used as a hand-out to introduce people to the CFMC story and mission. (staff)

2019 ADVERTISING SUMMARY

MEDIA BUDGET \$10,500

EVENTS MAGAZINE: Quarterly magazine with town specific editorial content, mailed free to every household within that town.

-Ads to be half-page, black & white and run in each of the quarterly issues of CLINTON EVENTS, CHESTER EVENTS, EAST HADDAM EVENTS, EAST HAMPTON EVENTS, ESSEX EVENTS, HADDAM EVENTS, OLD SAYBROOK EVENTS and WESTBROOK EVENTS from March 2019– Feb 2020. *Total of 32 ads (4 ads x 8 town pubs) at \$150 per ad (includes 40% discount) = \$4800*.*

**Special Note: Due to early deadlines, 6 of the 32 ads representing \$900 of budget will be placed in December 2019 but not run or be invoiced until January/February 2020, reducing the 2019 calendar expenditure to \$3900.*

VALLEY COURIER / HARBOR NEWS/ THE SOURCE: Weekly community newspapers mailed free to all households and newsstands in the towns of Chester, Deep River, Essex (Valley Courier); Clinton, Old Saybrook and Westbrook (Harbor News); Killingworth and Madison (The Source). Circulation is 24,550.

- 3 col x 6" ads, black & white, run 7 times in each paper, in March, April, May, June, September, November, and December. *Total of 7 x \$271.60 (includes 60% discount and digital ad version run on Shore pub website) = \$1901.20.*

THE CHRONICLE: Monthly community newspaper mailed free to all 20,000 households in Cromwell and Middletown.

- 3 col x 6" ads, black & white, run 7 times in each paper in March, April, May, June, September, November, and December. *Total of 7 ads x \$206/ad (includes 30% discount) = \$1442.*

ICRV RADIO: An internet radio station with programming focused on local issues and events in the lower Connecticut River Valley.

Monthly sponsorship, including 60 second spots to run (10) times each month plus no-charge bonus spots for 5 months. \$250 per month x 7 months = \$1750.

TBD SPONSORSHIP ADS: To be developed opportunities with public library or other town specific organization's newsletters or annual reports in the towns of Portland, Durham and Middlefield. Budget \$1500.

CFMC 2019	EDITORIAL	SPONSORSHIP	ADVERTISING	EMAIL	DIRECT MAIL	COLLATERAL	SOCIAL MEDIA	Fund-specific appeals for events
ONGOING	Media Releases						FB / Twitter	
JANUARY Natl Thank You/ Mentoring	News Column ICRV – FGF	iCRV		E-news			FB / Twitter	
FEBRUARY Acts of Kindness /Black History	News Column ICRV – FGF 2018-19 Grants	iCRV		E-news			FB / Twitter	Belfoure Ryans
MARCH Nutrition/Women’s History/ Disabilities	News Column iCRV – FGF	iCRV	Shore Pub* Chronicle EVENTS:WB/OSB	E-news	Leadership CBP 365		FB / Twitter	Belfoure Ryans
APRIL Volunteer/Poetry/ Child Abuse Preven. Sexual Assault Prev.	News Column iCRV – FGF	iCRV	Shore Pub Chronicle EVENTS: Haddam, Chester, Essex	E-news			FB / Twitter	Belfoure Ryans At Risk Boys Abely
MAY Mental Health Mother’s Day	News Column ICRV - FGF	iCRV	Shore Pub Chronicle EVENTS: Clinton E.Haddam, E.Hampton	E-news	Mother’s Day appeal		FB / Twitter	Belfoure Ryans At Risk Boys Abely
JUNE Leave A Legacy Father’s Day	News Column iCRV – FGF Feature Story	iCRV	Shore Pub Chronicle EVENTS: WB/OSB	E-news	Father’s Day	Annual Report	FB / Twitter	At Risk Boys Abely
JULY Natl Feminism Summer Camps	News Column iCRV - FGF	iCRV	EVENTS: Haddam, Chester, Essex	E-news			FB / Twitter	At Risk Boys
AUGUST Immunization	News Column iCRV - FGF	iCRV	EVENTS: Clinton E.Haddam, E.Hampton	E-news			FB / Twitter	At Risk Boys
SEPTEMBER Literacy Awareness/ Back To School	News Column iCRV – FGF	iCRV	Shore Pub Chronicle EVENTS: WB/OSB	Enews			FB / Twitter	
OCTOBER Bullying Prevention/ Domestic Violence	News Column iCRV – FGF	iCRV	EVENTS: Haddam, Chester, Essex	E-news	Annual Appeal		FB / Twitter	
NOVEMBER Natl Philanthropy/ Giving Day/Vets	News Column iCRV - FGF	iCRV	Shore Pub Chronicle EVENTS: Clinton E.Haddam, E.Hampton	E-news			FB / Twitter	
DECEMBER Holidays	News Column iCRV – FGF	iCRV	Shore Pub Chronicle EVENTS: WB/OSB	E-news	Holiday Letter		FB / Twitter	

*SHORE PUB: The Valley Courier, Harbor News and The Source newspapers.

Constant Contact Schedule
(General)

January	February	March	April
New Year	Compassion Counts	Spring Update	Volunteer Thank You
Compassion Counts	Valentine's Day	Women's History Month (lead into mother's day)	Mother's Day (send 2)
Pough Interiors 365 Event			Earth Day
			Accepting Honorary Rec. Noms
<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>
May	June	July	August
Mother's Day (send one)	Father's Day (send one)	4th of July	Back To School
Memorial Day	Congrats Grads	Grant Info Session	Labor Day
Father's Day (send 2)	Leave a Legacy	Gala Info	Info Session Reminders
Grant Cycle Info Workshops	Save the Date for Gala	Honorary Recognition Announcement	Gala Reminder
<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>
September	October	November	December
Labor Day	LC Luncheon Save the Date	Veteran's Day	Charitable IRA
Charitable IRA Rollover	Bully Free Month	Charitable IRA	Happy Holidays
	Unity Day	Thanksgiving	Happy New Year
		Compassion Counts	
		Days of Giving/Giving Tuesday	
<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>	<i>Round of Applause News & Notes</i>

Community Foundation of Middlesex County

2017- 2020 Strategic Plan

Our Mission

Community Foundation of Middlesex County's mission is to improve the quality of life for the people of the County now and in the future by developing endowments, making grants that have impact, and assisting donors in meeting their philanthropic objectives.

The Strategic Planning Committee proposes the following Strategic Plan that focuses on a four-year period- 2017-2020.

Move to Main Street. The move to Main Street during the first year of the strategic plan will be the catalyst in the implementation of the strategic goals. The new facility will be a tremendous asset for the Community Foundation as it will be a visible sign, as we *Communicate and Celebrate*, that the Community Foundation of Middlesex County is a major philanthropic force in meeting the needs of all Middlesex County residents. All major events and initiatives will publicize the move to Main Street and consistently state that CFMC matches donors' wishes with county-wide needs.

The Janvrin Bequest. The generous eight-million dollar gift from Janvrin Trust will provide CFMC with an opportunity to become the leader in Middlesex County, and beyond, in preserving and improving the natural state of the environment. However, the implementation of the requirements of the bequest will present a variety of challenges. These may include extensive program additions, increased staffing, committee involvement, volunteer recruitment and expanded communication. Bequest funds will become available in 2018, but initial planning for combining the new funds with existing resources and establishing partnerships with groups having an interest in preserving the environment should begin in 2017.

STRATEGIC GOALS

Goal 1. Governance and Infrastructure

- **Staffing.** If CFMC is to continue to accomplish its missions, staffing increases are necessary. Among the most important additions to the staff is a person that can coordinate the advancement of donor cultivation and development.

- **Organizational chart.** An organizational chart clearly defining the role of each position and impact that person will have on overall operation needs to be developed as precursor to responding to this organizational objective. The Personnel Committee, with guidance from the CEO, will be responsible for responding to this important planning priority.
- **Volunteer Leadership.** The Board and committee self-assessment are underway and are scheduled to be completed in 2017. Also, an essential component of strong governance is to develop clear mandates for committees, recruit board members with interest in assuming leadership positions, and establish a succession plan for board officers and committee chairs. Mentorship will be a necessary objective within this goal.
- **Advanced Bequest Planning.** A small leadership working group will be formed by January of 2017 to spearhead the planning for the first stages in meeting the requirements of the Janvrin Bequest. The group will report to the Governance Committee, (which will develop the charge) the Board Chair and submit recommendations through Governance to the Board.

Goal 2. **Building Partnerships.**

- CFMC's long term growth and success in achieving its mission will be influenced by its ability to build partnerships. Building new partnerships will enhance fund raising, strengthen grant making, make its operations efficient and ensure a quality service delivery. The Foundation must continue to build partnerships with individuals, (financial advisor, estate lawyers, etc.,) private and public foundations, service organizations and the business community.

Goal 3. **Study the Grant Making Process.**

- Grant making is a very fluid process. The needs of communities continue to change as they are impacted by the nature and magnitude of the problem. Public opinion and state funding can influence the perceived and real priorities within the county. Grant making must be nimble enough to respond to the changing priorities and donor interests. Therefore, grant making needs to be studied with the possible outcome being the reorganization of the grant making structure and process.

Goal 4. **Improve the Development Operation**

- Development is the life blood of increasing the funds for endowment growth, operations and grant making. The Development committee has

functioned well, but much of the fund raising has fallen on the shoulders of the CEO.

- As CFMC continues to grow in accomplishing its mission, instilling a fund raising culture throughout the organization will be vital in realizing this outcome. The addition of an experienced development professional who will set the agenda and guide the process of engaging all CFMC volunteers in building partnerships is an essential component in achieving fund raising success.
- This objective should be given a high priority and appear on the Development, Finance and Investment Committees agendas and reviewed by staff. It will ultimately need Board approval.

Goal 5. **Increase Visibility**

- Major strides have been made in increasing the Foundation's visibility during the 2014-2017. However, delivering the message that CFMC is a county wide philanthropic contributor needs to be a continuing strategic objective. The utilization of an effective marketing strategy is key to *Communicate and Celebrate* our culture of inclusiveness and flexibility in fulfilling our mission.

Approved by the Board of Directors: December 13, 2016