



Announcing the Spring 2016 Collegiate Maxi Oral Case Competition

Topic: *IMC Marketing Plan for a Designated Organization*

Presented by the

**Direct Marketing Association of Washington
Educational Foundation (DMAW/EF)**

**First Prize for Undergraduate Gold Winning Team=\$600
Second Prize for Undergraduate Silver Winning Team=\$400
Third Prize for Undergraduate Bronze Winning Team=\$200
Graduate Teams will be awarded with Certificates**

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The Competition— *Integrated Marketing Campaign for Selected Organization*

The Collegiate Maxi Oral Case Competition for the Mid-Atlantic region, spring 2016, offers students a choice among three different organizations. Student teams will be able to select one from among the three listed organizations and create an Integrated Marketing Communications (IMC) plan that is designed to help resolve the challenge of that selected organization.

The Organizations

- AARP Foundation (AARPF)
- Environmental Defense Fund (EDF)
- The Trust for Public Land (TPL)

The Challenge

What recommendations does your team have for one of these three organizations seeking funds in a crowded marketplace? With political fundraising activities reaching an all-time high, it is getting harder to compete, especially during major election years. What marketing strategy would your team recommend be used to forge ahead in this politically-charged atmosphere? Please develop a multi-channel marketing campaign to incorporate direct mail, social media, telemarketing and online engagements for fundraising that encompasses your recommended strategy for this organization.

The Case Competition

Overall, the student team is to identify and describe the segment(s) that the team seeks to reach, including the segment/audience profile(s). The team should provide a brief SWOT assessment of the organization (based on publically available information and, if feasible, the team's primary research efforts). The team should describe its overall creative strategy, explaining how this strategy builds on the SWOT assessment.

The team should provide a creative brief that includes a solid, measurable goal in regard to the team's proposed marketing efforts. The creative brief should state where the organization is presently--then where the team feels the organization would be as a result of the team's campaign. The team should include a sample of the team's proposed email copy and design, and sample social posts for FB, Twitter and/or other optional social channels. In any case, the email or social posts portion can be directed to the entire identified target segment or a sub-segment. The team's budget can be generalized, if necessary.

Other communication approaches are also encouraged. For example, the team might also propose developing a direct mail letter and envelope that would be used to contact at least a specific segment of the team's identified target segment or sub-segment, if this approach seems appropriate. Regardless, the target segment selected by the team should drive the organization's unique focus, but, depending on the organization's goals, does not need to reflect all the segments targeted by the organization.

Awards

Cash prizes will be awarded to the top three undergraduate teams, with the GOLD team members receiving \$600, the SILVER team members receiving \$400 and the BRONZE team members receiving \$200. All winning team members will also receive certificates announcing the team's award. Graduate teams will also be awarded certificates in the Gold, Silver, and Bronze categories but will not receive any cash prizes. The awards will be announced at the conclusion of the oral competition event.

Budget

The case budget for the team's campaign for each one of the three organizations is \$100,000, to be used for the creation of the team's campaign promotional materials. Note that this amount need not cover implementation costs (for example, if an organization already has a social media employee team, your proposal development would be an expense, but the ongoing social media messages would be the responsibility of the current social media employees of the organization). Teams are also permitted to submit a campaign design that would be deemed to be more expensive than the current budget, but the team needs to also provide its reasons for this increased expense. In all cases, teams should provide a general summary regarding costs of the team's recommended campaign along with the team's rationale for the campaign but need not go into great detail.

Presentation Guidelines

Teams will have 15 minutes for the team presentation, followed by 10 minutes for questions by the judges. Ideally, all teams will preload PowerPoint slides ahead of all presentations, and each team will have five minutes for setup before starting their presentation. Teams may be composed of 2-4 presenters, and should be all undergraduate or graduate in status. Teams should use secondary research in their marketing plan development, but are NOT to contact the organization (or an agency with a client-relationship with the organization). All information utilized by the team should be from the public domain. Primary research is also acceptable and encouraged.

Deliverables

Teams should bring 7 printed copies of the team's deliverables, arranged as described below. The team needs to submit these printed materials on arrival when checking into the competition and the team's oral presentation must reflect these written materials.

All pages should have a header line identifying the team and page numbers. If substitute presenters replace the original presenter names on the day of the presentation, hand-written changes can be made on the copies at the competition:

1. Title page, including name, class level, email, and cell phone contact of all presenters, as well as name and contact information of professor or advisor. Title page should also include school name and postal address as well as department or club name;
2. Executive summary (max, three pages, double spaced, although bullet phrases may be single spaced);
3. Sample hard-copy of email copy/design/ and/or sample digital advertisements, social posts for Facebook, Twitter, etc.
4. Any other samples or illustrations of samples of other communications, such as direct mail pieces (and envelope if needed), should also be provided, (as well as pictured on slides) if the team has chosen to utilize such communications. If so, rough sketches are acceptable (this is not a graphics competition).
5. Pictorial summary copy of the team's PowerPoint slides (can be 3 to 6 slides per page—slides just need to be legible) and/or all other graphics or other descriptive materials. If using Prezi instead of PowerPoint, please provide print versions of all pertinent slides that are clearly legible.

Disclaimer

The cases presented here, including all the respective organizations, are primarily based upon publicly available information. These case studies reflect the sole views of the case authors, and are not intended to represent any official statement by any of the participating organizations, agencies, or other individuals.

Case Presentation Details

The oral case competition will be held on Friday, April 22, 2016, and will be held at Quad Graphics, 99 Canal Center Plaza, Ste 300, Alexandria, VA, 22314. The Quad Graphics main phone is: 703-837-5200. Parking is available on site, for a cost of \$10 per vehicle.

Because this is an Oral Case Competition, open to all higher educational academic institutions throughout the Mid-Atlantic region, hopefully inclement weather will not be a transportation issue by this time and will not present a critical problem to teams commuting to the presentation site.

Schools may enter three teams as long as each team has selected a different organization from among the three different organization options provided here. Each presenting team is to be composed of 2-4 members, and teams from the same school need not have the same number of team members on each team. The Collegiate Maxi Competition is open to both undergraduate and graduate students, but teams must be composed of entirely one level or another.

For this oral competition, students are to provide content via their oral presentation accompanied by graphics and/or audio-visuals, along with the requested copies pertaining to the team's oral presentation (see above) which should provide a clear summary of the team's marketing plan.

DMAW/EF Student Ambassadors are encouraged to attend this oral case competition, either as one of the case presenters, or by accompanying the school's team(s) to this event. Student Ambassadors are also encouraged to attend this event, and are able to bring a guest, even if the respective school is not involved in case presentations.

Extension of oral case into written semester assignment

Professors who will be utilizing this oral case competition as part of their class deliverables are encouraged to assign a written case component due at the end of the semester although the written portion will not be part of this case competition.

Criteria for Success

Entries will be evaluated, based on the stated objectives of the respective organization's case challenge, that is, how effectively the proposed plan achieves those objectives. Entries will also be judged on effective use of marketing channels (online and/or off line), creativity, originality, and anticipated impact.

Deadlines

The Collegiate Maxi Oral Case Competition will be held on Friday, April 22, 2016, at the Quad Graphics location in Old Town Alexandria. Award winners will be announced at the time of the oral competition event.

All teams or schools need to send in the **intent to compete/attend** form, which must be received by Friday, **April 1, 2016, before 5:00 PM**. This information is needed so adequate arrangements can be made for the number of attendees at this event. Each academic institution is able to send up to three teams to the competition, along with each team's professor or advisor (if available) and, hopefully, the DMAW/EF student ambassador if present at that school. Student ambassadors are encouraged to attend this oral competition even if their respective schools are not involved with the case competition and may bring a guest to this event. Even if not involved with the case competition, all student ambassadors **NEED** to complete an Intent form, along with guest information for competition planning purposes.

The case challenge, three organization identities, and instructions are provided here by the DMAW/EF. Students will have February, March and part of April to develop their campaign for this oral case competition.

Contact information for the DMAW/EF is: Amy Steinbicker; administrator@dmawef.org or, **DMAW/EF, Attn. Executive Administrator, 200 Little Falls Street, Suite #205, Falls Church, VA 22046. 703-407-1663**



AARP Foundation (AARPF)

Mission

Mission Statement: AARP Foundation serves vulnerable people 50+ by creating and advancing effective solutions that help them secure the essentials.

What We Do

The Foundation helps struggling seniors by being a force for change on the most serious issues they face today. We provide:

- **Direct Assistance**
Working with local groups, government and national organizations, and corporations, the Foundation creates and supports solutions that help older people meet life's essentials: food, housing, income and personal connection.
- **Legal Advocacy**
We stand up for mature individuals in the courts. AARP Foundation Litigation advocates on behalf of older Americans, protecting their legal rights in critical retirement, health, long-term care and consumer issues.
- **Raising Awareness**
We work to increase awareness among individuals and thought leaders about the critical issues low-income older Americans face today, including research into causes and longtime solutions for these problems.

Direct Marketing Overview

In 2016 we are focused on the following:

- Continue to grow the donor file through aggressive acquisition efforts. Currently we prospect from the AARP membership base utilizing models to identify the most likely to respond.
- Develop new strategies for the lapsed and pre-lapsed segments of the donor file to continue their engagement with the Foundation. As of now, strategies are mainly focused on specific messaging within control formats to this audience.
- A package is considered a 'control' when it is mailed in high quantities, and tests are measured against it to get a read on viability for roll-out. We have seen consistently strong results from the control format we currently use despite the fact that it has been in the rotation for quite some time. We mail this format with and without a backend premium offer depending on audience.
- Increase the value and size of the Leadership donors (\$500-5,000), and Opportunity Builder (\$5,000+) audiences by upgrading more donors, and finding additional targets for upgrade to both of these donor levels.
- Even when you have a powerful 'master brand' like AARP, gaining recognition among members for all the 'co-brands' under the AARP umbrella is important.

Challenge

With political fundraising reaching all-time highs, it's getting harder to compete in the market, especially during major election years. What recommendations does your team have for the AARP Foundation seeking to compete in this environment? How does AARP Foundation stand out and compete against the many other organizations out there? What marketing strategies would you recommend for the AARP Foundation to get ahead in its fundraising in this politically-charged atmosphere? Please develop a multi-channel marketing campaign to incorporate direct mail, social media, telemarketing and online engagements and fundraising that encompasses your recommended strategies.



Environmental Defense Fund (EDF)

Mission

Environmental Defense Fund's mission is to preserve the natural systems on which all life depends. Guided by science and economics, we find practical and lasting solutions to the most serious environmental problems. What distinguishes Environmental Defense Fund is the combination of what we protect and how we protect it.

We work to solve the most critical environmental problems facing the planet. This has drawn us to areas that span the biosphere: climate, oceans, ecosystems and health. Since these topics are intertwined, our solutions take a multidisciplinary approach. We work in concert with other organizations — as well as with business, government and communities — and avoid duplicating work already being done effectively by others.

Direct Marketing Overview

Environmental Defense Fund's marketing team is focused on improving four key parts over the course of the year.

- **Retention:** EDF has been very successful at upgrading donors, but has identified retention as an area of improvement.
- **Multichannel:** We know that converting single channel donors into multichannel donors improves long-term value. We've had much greater success converting online donors into offline donors. But, given the emerging trends in the marketplace, we know we must continue to engage our donors through a variety of channels to bond them even more closely to EDF.
- **Maximize Net:** A penny saved is a penny earned, and we should continuously strive for efficiencies in our mailings and campaigns. Our cost-saving measures will look for ways to save money without sacrificing donor value and campaign performance.
- **Segmentation and modeling:** Who do we include or exclude from a particular mailing? How do we score/model our file to maximize our returns on house mailings as well as activist conversions and lapsed donor reinstatements? Our segmentation and modeling testing will focus on finding opportunities in our file to contact our constituents with more precision and efficiency.

Challenge

With political fundraising reaching all-time highs, it's getting harder to compete in the market, especially during major election years. What recommendations does your team have for Environmental Defense Fund seeking to compete in this environment? How does EDF stand out and compete against the many other environmental organizations out there? What marketing strategies would you recommend to get ahead in this politically-charged atmosphere? Please develop a multi-channel marketing campaign to incorporate direct mail, social media, telemarketing and online engagements and fundraising that encompasses your recommended strategies.



The Trust for Public Land (TPL)

Mission

The Trust for Public Land (TPL) is a national nonprofit organization working to protect land as parks and open space. We are not a government agency, although we sometimes work with agencies to protect land.

TPL's mission is to create parks and protect land for people, ensuring healthy, livable communities for generations to come. Every park, playground, and public space we create is an open invitation to explore, wonder, discover, and play. We're proud to say that we've been connecting communities to the outdoors—and to each other—since 1972. Today, millions of Americans live within a 10-minute walk of a park or natural area we helped create, and countless more visit every year.

Direct Marketing Overview

In 2016 our efforts are focused on the following:

- Acquire more new donors and replace the current notecard control package.

TPL's current acquisition strategy is a 2-pronged approach. Over the past few years, TPL has relied on an upfront premium package (Notecards) to solicit new donors from the environmental/conservation list market. While the package has worked well enough to bring in a slow and steady stream of new donors, it has not been the optimal nor the preferred method for new donor acquisition.

TPL's preferred method for new donor acquisition leverages a package that is more mission-based and does not rely on an up-front premium to acquire a new donor. Recently, TPL was able to capitalize on a current advocacy issue around the Land and Water Conservation Fund (LWCF) expiring and ultimately restored for another 3 years with partial funding. We developed a petition package around the issue and generated a response in acquisition that TPL has not experienced in over 5 years.

We are going to continue seeking to acquire new donors off of the LWCF issue reiterating the continued threat that exists and the need for organizations like TPL to cover the difference generated by the partial funding. However, the LWCF-centered package is not a long-term solution and TPL is still seeking a mission-based non premium acquisition package to help them meet their new donor objectives and off-set annual attrition rates.

- Upgrade donors into the Conservation Champions mid-level giving group (requires cumulative gift annually of \$2000). Information on this giving level can be found on the website: <https://www.tpl.org/conservation-champions-benefits>
- Develop strategies (creative and targeting) to move the \$100-\$250 donors up the giving pyramid without asking them to make the leap into the Mid-Level program.

Challenge

With political fundraising reaching all-time highs, it's getting harder to compete in the market, especially during major election years. What recommendations does your team have for The Trust for Public Land seeking to compete in this environment? How does TPL stand out and compete against the many other similar organizations? What marketing strategies would you recommend to get ahead in this politically-charged atmosphere? Please develop a multi-channel marketing campaign to incorporate direct mail, social media, telemarketing and online engagements and fundraising that encompasses your recommended strategies.

Collegiate Maxi Promotion Costs

	Test promotion - 25,000 pieces prices per thousand pieces	Rollout promotion - 250,000 pieces prices per thousand pieces
Direct mail		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Printing	\$130.00	\$99.00
Personalization and D.P.	\$78.00	\$63.00
Mailing	\$67.00	\$47.00
Postage	\$165.00	\$165.00
Lists	\$100.00	\$100.00
Total	\$670.00	\$487.00
	per thousand	per thousand
Email		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
E blast (transmission)	\$30.00	\$30.00
List	\$150.00	\$150.00
Total	\$310.00	\$193.00
	per thousand	per thousand
Newspaper Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Run Of Press Rate	\$40.00	\$40.00
Total	\$170.00	\$53.00
	per thousand	per thousand
Magazine Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Run Of Press Ad Rate	\$60.00	\$50.00
Total	\$190.00	\$63.00
	per thousand	per thousand
Telemarketing		
Script Writing	\$35.00	\$3.00
Calling	\$90.00	\$85.00
List	\$100.00	\$100.00
Total	\$225.00	\$188.00
	per thousand	per thousand

Banner Ad Network		
Copy Writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Ad Network Pay Per Click Rate	\$40.00	\$30.00
Landing Page Web Hosting	\$75.00	\$40.00
Total	\$195.00	\$78.00
	per thousand	per thousand
Paid Search Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Pay Per Click Rate	\$20.00	\$15.00
Landing Page Design	\$60.00	\$6.00
Landing Page Web Hosting	\$75.00	\$40.00
Total	\$285.00	\$74.00
	per thousand	per thousand