

National Society of the Sons of the American Revolution



Marketing Plan

June 15, 2023

Executive Summary

This document will serve as the marketing plan for the National Society of the Sons of the American Revolution. It will outline the separate goals and the strategies to be implemented to achieve them. The four-target audience approach will include:

- Gaining a general local awareness of the SAR presence, mission, and goals.
- Donor-centric specific marketing about the Education Center and Museum project. The overall case for support, how much has been raised and how much is still needed.
- General awareness and education around the America 250 celebration
- Increasing membership through various marketing efforts.
- Supporting state societies and chapters with marketing materials.

Business Summary

National Society of the Sons of the American Revolution (NSSAR or SAR) was founded in 1889 and is headquartered in Louisville, Kentucky. The SAR is a non-profit organization dedicated to promoting non-partisan patriotism, preserving American history, and promoting education to our future generations. SAR members volunteer untold hours of service each year in their local communities. SAR is very active in assisting veterans. We proudly assist teachers with living history interpreters, lesson planning materials and reenactment events for school aged youth.

As the largest male lineage society in the country, SAR boasts tens of thousands of active members in over 575 chapters across the United States and internationally. Any male, regardless of race, religion, or ethnic background-who can prove blood lineal descent from a patriot, service provider or government official of the American Revolution, is eligible for membership. The SAR National Headquarters houses one of the nation's premier genealogical libraries. NSSAR is a Congressionally Chartered Organization and is exempt from Federal income taxes under the provisions of Section 501(c)(3) of the Internal Revenue Code.

Strategic Plan Objectives

Objective 1B (of the Strategic Plan): Create a nationwide, multi-media public affairs campaign, including staffing recommendations for a professional public affairs group, for the 250th Anniversary of the American Revolution by 2022 with implementation by headquarters, state societies, and chapters by 2024.

Objective 1C (of the Strategic Plan): Boost the public image of the Society as a lineage organization through technology investment and a focused marketing campaign of the Society's genealogical resources.

Purpose

This document outlines the contents of the marketing plan. Action plans will be developed after marketing goals have been approved. However, the marketing channels serve as a general guide for accomplishing the marketing goals. Additionally, a particular focus will be to enhance interaction with business and civic groups both in Louisville and Nationally.

The purposes of the Sons of the American Revolution are patriotic, historical, and educational, and include those intended or designed: (1) to perpetuate the memory of the men who, by their services or sacrifices during the war of the American Revolution, achieved the independence of the American people; (2) to unite and promote fellowship among their descendants; (3) to inspire them and the community at large with a more profound reverence for the principles of the government founded by our forefathers; (4) to encourage historical research in relation to the American Revolution; (5) to acquire and preserve the records of the individual services of the patriots of the war, as well as documents, relics, and landmarks; (6) to mark the scenes of the American Revolution by appropriate memorials; (7) to celebrate the anniversaries of the prominent events of the war and of the Revolutionary period; (8) to foster true patriotism; (9) to maintain and extend the institutions of American freedom; and (10) to carry out the purposes expressed in the preamble to the Constitution and the injunctions of Washington in his farewell address to the American people.

Mission Statement

The Sons of the American Revolution honors our Revolutionary War patriot ancestors by promoting patriotism, serving our communities, and educating and inspiring future generations about the founding principles of our country.

Marketing Team & Management

The marketing and communications efforts will be driven by one staff member, located at the National Headquarters. This position is supported by the communications committee and the public relations, social media, and branding sub-committees. The degree of implementation is limited by a staff of one person and committees of volunteers.

It is recommended that a marketing committee be formed, with members appointed by the President General with staggered terms. It is recommended that each major committee have a representative on the marketing committee. These members would review requests from members outside of the committee. At a minimum that would include Membership, Museum, 250th Celebration, Strategic Planning, Communications and Color Guard.

Marketing Goals

Marketing Goal Name	Marketing Goal Description
General local awareness of SAR presence	There is a lack of general awareness within the Louisville community that the national headquarters for the SAR is located in the city. Local public awareness is key to developing relationships and making a footprint within the community.
General National awareness of SAR presence	Marketing efforts will generate widespread awareness across the country of the benefits of the SAR.
Increased awareness of the Education Center and Museum	Highlighting the SAR Foundation will promote the overall case for support, how much has been raised, how much is still needed, remaining naming rights and opportunities.
General awareness and education about the America 250 anniversary	As the 250th anniversary of our nation's founding comes, it is vital that the SAR leads the efforts to celebrate and educate people about our nation's history.
Increased membership and retention	Increased membership and retention is vital to sustaining the SAR and funding future projects within the society. Increased retention through analysis and focused strategies is essential.
Expanded reach of the education and outreach efforts of the SAR.	Support the educational goals of the outreach & education department through promotion of the Education Center, Keyholes to History, Artifacts, Speaking Out About History, Rarities Podcast, and Youth Programs.

Marketing Key Performance Indicators (KPIs)

Marketing KPI Name	Marketing KPI Description (Trends over time to be noted.)
Membership acquisition and retention	Number of new members, number of retained members, number of reinstated members, net membership change.
Social media followers	The number of people who “Like” or “Follow” our social media platforms. As well as tracking other metrics. Will begin using these analytics on a monthly basis starting May 1st, 2023.
Website visitors	The number of visitors, unique visitors and where they are geographically visiting our website from over a given period, including specific pages on the website. Will begin using Google Analytics on May 1st, 2023 and report tracking monthly.
Youth Contest Participants	Total state entries by contest category
Museum	Number of financial donors, total gifts, cost and total number of artifacts in the Collection, attendance, and virtual outreach.
Business and non-profit interaction	Chamber of Commerce participation. Involvement with various networking groups. Relationships with community organizations and foundations.
Color Guard Activity	Number of National Congress Color Guard attendees. Number of State Color Guard attendees. Number of Chapter Color Guard members. Color Guard medals awarded. Number of public-facing events.

SWOT Analysis

Strengths: (Internal)

- A thorough understanding of revolutionary war history and the ideals that the United States of America was founded upon
- A large membership base that can act as advocates for the SAR
- A lengthy history, backing the stability of the organization
- A highly visible color guard, which is the face of the SAR in the community

Weaknesses: (Internal)

- Very little knowledge within the Louisville, KY community that the national headquarters is located in its downtown
- Dilution of messaging through too many social media accounts
- A lack of awareness of everything that the SAR offers to its members
- Aging membership comes with a lack of knowledge surrounding technology
- Lack of participation by the membership
- Lack of revenue / independent revenue sources

Opportunities: (External)

- The opening of the Education Center and Museum will significantly increase awareness of the SAR in Louisville and nationally. It will provide for interactions with schools for field trips and our educational outreach programs. It also will provide for involvement of other museums around the US in artifact loans and travelling displays. It will also draw tourists visiting the Louisville area, increasing the awareness of the SAR and its purposes.
- Increased membership through various marketing efforts, ensuring the stability of the organization.
- Other genealogical libraries within the community (i.e., Louisville/Lexington) and wider/nationwide community
- Colleges and universities nation-wide
- Other educational/historical societies locally and nationwide
- Partnership with DAR for specific projects
- Development of unified national brand
- Diversity
- Tag line on official emails, correspondence, and event advertising
- Development of a unified national brand
- Involvement with television shows like "Who Do You Think You Are?" and "Finding Your Roots with Henry Louis Gates, Jr."

Threats: (External)

- Misconceptions of what the SAR is and what it represents
- Lack of communication to the public by membership about SAR benefits
- Increasing membership dues / paying for membership
- Weakness of SAR brand
- Continued brand fragmentation
- Perceived lack of diversity

Marketing Channels

- It is important to identify the target audience and what you are providing them.
- Develop customer personas for each of the types of engagement you are seeking
- Determine the best means for reaching each persona type
- Implement a strategic plan for staying in regular contact with each persona type

Channel #1

Social Media

Social media marketing is an important category of digital marketing that involves encouraging member communications on our own site, or social presences such as Facebook or Twitter and specialist publisher sites, blogs and forums. It can be applied as a traditional broadcast medium – for example, organizations can use Facebook or Twitter to send messages to partners who have opted in. Twitter should be used for near-daily posting, Facebook 2-3 times per week. Instagram account can feature visually interesting items, like pieces from a collection. Periodic content featuring reasons to retain your membership are important.

To increase social media interactions, there needs to be stronger engagement efforts which include, but are not limited to:

- Development of a social media calendar to allow for planning ahead of what posts are needed and the content creation involved
- Create video content for posts to create stronger story telling and more engaging content
- Create a strategy of engaging with other social media accounts that are aligned with SAR or that may not be aware of SAR which in turn creates greater awareness and engagement
- Ensure that all comments received are responded to in a timely manner
- Create a call to action such as “go to our website for more info on [event]”, or ask a question to the audience
- Create freebies that the audience may benefit from and in exchange receive their email address for future content delivery via email marketing and/or newsletters

Channel #2

Email Marketing

Another free channel for low volumes of emails, this is not so much about gaining awareness, rather it's about supporting conversion by reminding subscribers about the benefits of our brand and services.

“Patriot Post” or “Patriot Pulse” – sending at least monthly to update membership events and activities happening within the SAR. Periodic focus on benefits of retaining membership.

This is definitely helpful to the overall goals of increasing awareness and engagement. It also continually shows the value of the organization to the population. This is the best time to ramp up, as the interest will increase leading up to the 250th anniversary. The national headquarters will utilize either its current bulk-email service or another to communicate with members and non-members.

Channel #3

Website

Gaining visibility on the various search engines using to encourage click-through to the SAR website when the user types a specific keyword or phrase. Two key search marketing techniques are paid placements using pay-per-click via Google Ads or Bing, and placements in the natural or organic listings using search engine optimization (SEO) where no charge is made for clicks from the search engine.

The website serves as the hub for all other forms of communication. It is important to direct your audience to the website where they will learn more about the organization once they are there, as well as, respond to calls for action.

There are also keyword searches that can be conducted to determine what metadata will improve visibility in Google searches. (Metadata definition)

Channel #4

Press / Public Relations

- A major event is coming up, and we need to push awareness.
- Celebrations of milestones during fundraising campaigns.
- Facing unexpected demand, and we want the public to know you need their help to raise money or recruit volunteers.
- Generally, need to grow our community of donors, supporters and volunteers.
- Launching a new project or initiative or releasing a new report that could be relevant to a broad audience.
- The marketing staff-person will collect email addresses of news outlets in the country's largest cities and distribute press releases on a regular basis, expanding the national reach of the SAR.

Channel #5

Color Guard Activity

- Magnify color guard presence with each member distributing marketing handouts
- Increase color guard numbers
- Increase color guard participation

Channel #6

Public Television

- Secure resources to invest in underwriting the forthcoming Ken Burns American Revolutionary War documentary series on PBS in as many significant markets with active state societies as possible. Once branded, every rerun for years is free beyond our initial investment.
- Develop a national partnership with PBS to explore underwriting options in high-visibility markets with active state societies. This could include, but is not limited to, the “Know your Roots” show, the Benjamin Franklin documentary, etc., any era or core business-aligned program options that may stimulate additional membership applicants.
- Develop a solid local KY/Louisville/Lexington relationship with PBS that ultimately leads to some portion of “in-kind” underwriting that has some standard value in addition to the paid underwriting.
- Advertise on streaming platforms that target audiences that align with potential SAR members. An example of this is the utilization of “Vibe” advertising services.

Channel #7

Online Genealogy

- Online genealogy will be considered at some point in the future.

Taglines

“Where does your American story begin?”



The question, “Where does your American story begin?” can not only be used as a tagline for the organization, but as an entire campaign that sparks the conversation of the ancestral roots of any SAR member. Video or essay submissions will give valuable content to be posted on various marketing channels and will support the SAR’s mission of being educational, historic and patriotic.

This messaging should be funneled through each of the marketing channels.

Utilizing a banner on the front (and possibly back) of the building with this tagline, to identify the SAR.

Story telling is a huge part of human existence and engagement. A campaign should be created to collect video stories on an ongoing basis, then used in social media posts and promotions of various types. As folks see these stories, they become more engaged as well. There will need to be a means for receiving and reviewing the submissions, as well as, strategically utilizing the stories received.