Chapter:

# Marketing & Communications

# Introduction

A robust marketing and communications strategy is essential to both generate awareness of the ESA program and keep stakeholders well informed. This chapter explores key aspects of communications and provides tools that program administrators can employ to deliver precise and timely information to various stakeholders. This chapter also dives into marketing efforts and offers templates that program administrators may use to effectively market the program to eligible families and report impact stories that will foster confidence in the ESA program among the public.

### Plan

Marketing and communications requirements will differ across states, shaped by the specific statute that governs each program. Prior to determining the ESA program's communication and marketing strategy, the program administrator must conduct a review of the statuary language that governs the program from an implementation perspective with the goal of understanding the points below. Doing so will allow the program administrator to be prepared to develop objectives, set milestones, and assign responsibilities.

- All requisites pertinent to marketing and communications.
- Appropriation/budget review for implementation, including any line items for marketing and communications.
- Whether an in-house solution or procurement of a third-party solution is required.

### Design

While some states directly manage the marketing and communications of the program, others may outsource the task to a vendor. Depending on statutory requirements, there may be various approaches to consider when implementing marketing and communications. For example:

- States can manage marketing of one or multiple programs through the administering state agency.
- States can contract with one or multiple vendors to handle marketing of one or multiple programs.

# Guide to Communications

## Purpose

This section offers a guide for establishing a strong communication process. More specifically, it identifies relevant stakeholders, specifies the information to be conveyed to them, discusses the methods and frequency of communication, and explores various communication channels and tools available to program administrators. This guidance will help program administrators better understand how to engage with stakeholders, what information to prioritize, and how to utilize different mediums for effective communication.

### Build

## Stakeholder Identification

Program administrators are responsible for relaying information regarding the ESA program to specific individuals. A program administrator should begin building their communications plan by first identifying stakeholders. The relevant stakeholders for ESA programs can be categorized as such:

### Families

Parents, guardians, and family members

### Schools & Education Providers

School district administrators & associations, teachers' organizations, private educational institutions and service providers

### State Lawmakers

State senators, representatives, education committee members and champions

### State Officials

Rulemaking authority and oversight officials
(E.g., Department of Education, state treasurer, governor's office)

### Taxpayers

General public, advocacy groups, community groups, public media

## Needs Assessment

After identifying stakeholders, the program administrator should assess what information needs to be communicated to them, how it should be shared, and the frequency of communication. The table below provides examples for program administrators to consider during a needs assessment.

| Stakeholders | What to Communicate | How to Communicate | When to Communicate |
|---|---|---|---|
| **Families** | Benefits, eligibility criteria, application processes and timelines/deadlines, useful program data, accessibility information, data privacy | Website, personalized emails/newsletters, informational webinars, social media, direct mail, online training modules, text messaging, community events | Regular intervals (weekly, monthly, and quarterly), key enrollment dates |
| **Schools & Education Providers** | Funding and reimbursement timelines/deadlines, application processes, useful program data, benefits, compliance requirements | Professional meetings, educational conferences, direct emails, newsletters, community events | At the start of the academic year, key enrollment dates, periodically throughout the year, as updates arise |
| **State Lawmakers** | Program impact, success stories, legislative needs | Formal reports, policy briefs, in-person meetings, legislative hearings | Before and during legislative sessions, during implementation phase, during budget discussions |
| **State Officials & Leadership** | Operational updates, compliance status, program challenges and successes | Official memos, policy briefs, scheduled meetings, press releases | Quarterly, during budget cycles, when significant changes or achievements occur |
| **Taxpayers** | Success stories, annual audit findings, financial transparency data | Public forums, social media, local media, podcasts | Annual performance review, during public budget discussions, periodically showcase successes |

## Communication Channels

There exists a wide array of communication channels and tools to disseminate information, each serving a different purpose. The program administrator should consider leveraging available resources to optimize communication with stakeholders. The below enumerates such channels.

| | Channel | Description |
|---|---|---|
| @ | **Email** | Provide direct, personalized communication, sharing updates, and sending important documents. |
| ♥ | **Social Media Platforms** | Engage with a wide audience, share content, and interact in real-time discussions. |
| 🌐 | **Website or Blog** | Acts as a central hub for information, announcements, and resources. |
| ⓘ | **Newsletters** | Distribute periodic updates, news, and relevant information to subscribers. |
| ✉ | **Direct Mail** | Send physical letters or materials to reach target families. |
| 📞 | **Phone Calls** | Enable direct conversations for personalized communication and problem-solving. |
| 💬 | **Text Messaging (SMS)** | Send quick updates or reminders to individuals' mobile devices. |
| ▶ | **Webinars** | Host online seminars or trainings to educate and engage program applicants, participants and on-the-ground partners and advocates. |
| 🪧 | **Digital Signage** | Display announcements or information in public spaces using electronic displays. |

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| | **Podcasts** | Share audio content for informative or storytelling purposes, accessible on-demand. |
| | **Press Releases** | Announce newsworthy information to media outlets and the public. |
| | **Public Speaking Engagements** | Present information to audiences at events, conferences, or meetings. |
| | **Community Events & Workshops** | Engage with local communities and provide in-person support. |
| | **Printed Materials** | Distribute physical materials such as brochures or posters for offline communication. |
| | **Interactive Online Forums** | Facilitate discussions and exchange ideas among participants. |

# Develop the Communications Plan

## Purpose

This section details a step-by-step strategy to successfully deploy a communications plan. It also offers guidance on team management practices and recommendations to continuously improve the communications plan, emphasizing the need for regular assessment, feedback collection, and adaptation to evolving trends and stakeholder needs.

> ## Execute

## Strategy

After conducting the stakeholder identification and needs assessment in the previous section, follow this guide to develop a formal communications strategy. See the subsequent section for a sample communications plan.

**1**  *Set Communications Objectives*
Objectives should be specific, measurable, achievable, relevant, and time-bound (SMART), such as:
- Increase applications or enrollment by [X]% within [timeframe].
- Increase e-mail open rate by [X]% within [timeframe].
- Host [X] webinars within [timeframe] to educate [audiences] about the program.
- Reduce [X] frequently asked questions by addressing them on [channels] within [timeframe].

**2**  *Segment the Audiences*
Tailor communication to effectively reach and engage identified audiences. Consider demographics (age, gender, income, education level, occupation, and location), psychographics (attitudes, values, lifestyles, and interests), or communication preferences when customizing. Additionally, ensure communication is available in multiple languages and culturally inclusive, addressing the specific needs and concerns of diverse families.

**3**  *Allocate the Budget*
Determine the budget for communcation efforts, allocating resources to different channels based on their potential impact and cost-effectiveness. Consider factors such as content creation expenses and staff or agency fees, whether developed in-house or outsourced.

**4**  *Define Roles and Responsibilities*
Outline the specific tasks, functions, and accountabilities of individuals or teams involved in executing the communications plan. Assign roles and responsibilities based on expertise, experience, and capacity. See team management practices below for additional information.

**5**  *Choose Appropriate Communication Channels*
Select the most suitable platforms and methods for delivering messages to the target audiences. Consider matching the message to the medium. For example, visual content like infographics or videos may be more suitable for social media, while detailed information may be better suited for newsletters or websites.

**6** ***Adhere to Communication Guidelines***

Guidelines, consisting of style, formatting, and language conventions, serve as a framework to ensure uniformity, clarity, and effectiveness. Guidelines are also to include legal and ethical guidelines governing communication practices, including regulations related to privacy, data protection, and intellectual property rights. To help, have readily available templates to standardize workflows and facilitate collaboration among team members.

**7** ***Create Content Calendars***

Organize the creation and distribution of content over a specific period. Quarterly content calendars, for example, outline communication themes and topics to be executed over a three-month period. Content calendars should be dynamic documents that are regularly reviewed and refreshed as needed. This allows for flexibility in response to changing priorities or unforeseen circumstances.

**8** ***Crisis Communication Plan***

Develop a crisis communication plan to address potential issues or emergencies that may arise. Outline protocols for responding to crises swiftly and transparently, maintaining trust and credibility with the audiences.

**9** ***Monitor and Measure Performance***

Monitor metrics such as website traffic, social media engagement, and email open rates. Assess results to improve the communication plan.

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## Team Management Practices

The team of staff dedicated to communications must be equipped with the necessary skills and expertise. To accomplish this, integrate these team management practices:

- [ ] Execute a training program to ensure all staff understand and comply with all guidelines and standards. Train higher-level staff to review all content for accuracy, consistency, legality, and ethical considerations to maintain the program's integrity and reputation.

- [ ] Foster collaboration and communication among team members in various departments (e.g., communications and customer service) to leverage diverse perspectives and expertise to improve communications.

- [ ] Employ staff members to analyze data to optimize communication and reach target audiences effectively.

- [ ] Employ externally focused communications team members that engage with stakeholders, including families, schools, education providers, community organizations, and policymakers, to gauge communication needs.

- [ ] Empower staff to identify root causes for communication issues and suggest solutions.

- [ ] Conduct, track and report performance audits regularly.

### Support

The program administrator should review the communications plan on a regular basis to ensure it remains relevant and effective. The program administrator can also make refinements based on insights gathered from performance metrics and audience interactions. Below are a few recommendations to achieve this:

- Regularly review and update communication materials, website content, and marketing collateral to reflect program updates and changes.
- Regularly review data from customer interaction tools (emails, customer service hotline, social media) to identify trends of FAQs or issue areas where communication efforts may be falling short. Adjust communications plan to mitigate for these FAQs and issue areas.
- Solicit input and involvement from key stakeholders, including program participants, schools, education providers, policymakers, and community partners to ensure alignment with their needs and priorities.
- Stay up to date on industry trends, best practices, and emerging technologies and adapt as necessary.
- Implement a robust tracking and analytics system to measure the effectiveness of communication initiatives.

# Content Calendar Template

## Purpose

The purpose of this section is to offer an exemplary communications plan. This plan specifies what information needs to be conveyed, the format in which it should be delivered, the frequency of communication, and who it should be provided to. By presenting a structured approach, including clear objectives, appropriate channels, and consistent communication schedules, this example serves as a valuable guide for program administrators.

### Practical Example

## Content Calendar

🌐 = Website     💬 = Text message (SMS)     📣 = Newletter     ✉ = Email     🔔 = Portal Notification

| Communication | Purpose | Channel | Frequency | Audience |
|---|---|---|---|---|
| **Program Launch and Announcements** | Notify stakeholders about the launch of a new program or the introduction of significant updates to existing programs.<br><br>Include details about the program's purpose, benefits, eligibility criteria, and how to participate. | 🌐 ✉ | Annually or quarterly | Enrolled participants<br><br>Members of the public |
| **Application Periods and Deadlines** | Communicate the opening and closing dates of application periods for enrollment, funding, or participation in the program.<br><br>Remind stakeholders of approaching deadlines to encourage timely submissions. | 🌐 ✉ 💬 🔔 📣 | Monthly or weekly | Families that have started the application<br><br>Members of the public<br><br>Community partners |
| **Policy Changes and Updates** | Inform stakeholders about any changes to program policies, regulations, or guidelines.<br><br>Clearly explain how the changes may impact them and provide resources for further information. | 🌐 ✉ | As needed | Enrolled participants<br><br>Community partners |

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| | | | | |
|---|---|---|---|---|
| **Event Invitations** | Invite stakeholders to participate in workshops, webinars, conferences, or community events related to the program.<br><br>Include details such as date, time, location, and registration information. | 🌐 ✉ | Monthly | Enrolled participants<br><br>Members of the public<br><br>Community partners |
| **Educational Resources and Training Opportunities** | Provide educational materials, resources, and training opportunities that can help stakeholders better understand the program, its benefits, and how to navigate it effectively. | 🌐 ✉ | Quarterly | Enrolled participants<br><br>Community partners |
| **Frequently Asked Questions** | Address common queries and concerns that stakeholders may have about the program. Compile and share a list of frequently asked questions along with clear and concise answers. | 🌐 | Update as needed | Enrolled participants<br><br>Community partners |
| **Reminder Messages** | Send periodic reminders about upcoming events, deadlines, or key milestones related to the program. | ✉ 💬 | As needed | Enrolled participants<br><br>Families that have started the application |
| **Surveys** | Request feedback from stakeholders through surveys or feedback forms to gauge their satisfaction with the program and gather insights for improvement. | 🌐 ✉ 💬 | Quarterly | Enrolled participants |
| **Accessibility and Support Information** | Provide information on accessibility options, support services, and helplines available to stakeholders who may need assistance or have specific needs. | 🌐 | Annually | Enrolled participants |
| **Data Privacy and Security Information** | Communicate the program's commitment to data privacy and security, ensuring stakeholders' personal information is protected. | 🌐 | Annually | Enrolled participants |
| **Success Stories and Testimonials** | Highlight families who have been positively impacted by participating in the program. By sharing real-life experiences, the program will resonate with stakeholders on a personal level. | 🌐 📣 | Annually | Enrolled participants<br><br>Members of the public<br><br>Policymakers |

# Guide to Marketing

## Purpose

Marketing plays a pivotal role within the context of implementation as a means to grow awareness and participation, as well as foster a positive public perception of the ESA program across diverse audiences. This section offers a guide to develop the branding and messaging as well as the tools available to deploy the content.

### Build

### Branding

A strong brand resonates with stakeholders and establishes trust. Key considerations for branding include:

- ☐ Articulating the program's purpose.

- ☐ Develop brand elements for visual identity (logo, color schemes, and primary iconography).

- ☐ Ensure consistency in branding to reinforce brand recognition and trust.

- ☐ Incorporate branding into all marketing and communications materials such as marketing campaigns, press releases, social media posts, email newsletters, etc.

- ☐ Monitor engagement to make adjustments as needed.

### Messaging

Clear, compelling and consistent messaging enhances understanding and motivates engagement. Key considerations for messaging include:

- ☐ Develop key messages, taglines, tone and voice. Consider the audience's varying interests, expectations, and levels of understanding about the program.

- ☐ Set messaging guidelines to maintain consistency.

- ☐ Ensure alignment of messaging with brand identity.

- ☐ Anticipate and prepare responses to messaging challenges. Consider looking to other states to foresee some predictable pain points.

- ☐ Monitor audience perception and reception to make adjustments as needed.

## Marketing Tools

Similarly to communication channels, there exist various marketing tools to disseminate information, each serving a different purpose. Depending on the size of the program and marketing budget of the program, a program administrator may leverage the following tools:

| | | |
|---|---|---|
| | **Printed Materials** | Printed materials containing information about the program, often distributed at events, conferences, or through direct mail. |
| | **Social Media** | Platforms such as Meta, X, and LinkedIn used to share content, engage with audiences, and promote the program. |
| | **Programmatic Pre-Roll CTV** | Digital ads that plays short video ads before a user starts watching online video content, including on connected TVs (CTV). |
| | **Email Marketing** | Targeted promotional or informational messages to a list of subscribers. |
| | **Content Marketing** | Blog posts, articles, videos, and infographics to attract and retain a target audience. |
| | **Search Engine Optimization (SEO)** | Website content and structure to improve visibility and rankings on search engine results pages (SERPs) and attract organic traffic. |
| | **Pay-Per-Click (PPC) Advertising** | Online advertising model where advertisers pay a fee each time their ad is clicked, commonly used in search engine advertising (e.g., Google Ads) and social media advertising. |

| | **Media Coverage** | Story pitches to journalists/news publications to include in local coverage. |
|---|---|---|
| | **Advocacy Events** | Participation in or sponsoring of advocacy events and conferences, to raise awareness and engage with target audiences. |
| | **Direct Mail** | Physical promotional materials via postal mail. |
| | **Mobile Marketing** | Advertisements to mobile device users through channels such as mobile apps, SMS marketing, or location-based advertising. |
| | **Video Marketing** | Video content to educate and inform target audiences, often through platforms like YouTube, Vimeo, or social media channels. |
| | **Affiliate Marketing** | Partnerships with affiliates or third-party publishers to promote the program. |
| | **Referral Programs** | Incentives for participating families to refer the program to others. |
| | **Policy Briefs & Annual Reports** | Formal documents to relay program results to certain stakeholders, such as state lawmakers and state education officials. |

# Develop the Marketing Plan

## Purpose

This section will detail strategies and the team needed to successfully deploy a marketing plan. It also offers guidance to continuously improve the marketing plan, emphasizing the need for regular assessment, feedback collection, and adaptation to evolving trends and stakeholder needs.

> 🚀 Execute

## Strategy

After conducting the stakeholder identification and needs assessment in the previous section, follow this guide to develop a formal marketing strategy. See the subsequent section for free, downloadable branding assets.

**1**  ***Set Marketing Objectives***
Objectives should be specific, measurable, achievable, relevant, and time-bound (SMART), such as:
- Raise awareness of the program among [target audience] by [X]% within [timeframe].
- Improve public perception of the program by [X]% within [timeframe].
- Improve online engagement metrics (e.g., time on site) by [X]% within [timeframe].
- Increase impressions on [social media platform] by [X]% within [timeframe].

**2**  ***Segment the Audiences***
Tailor marketing to effectively reach and engage identified audiences. Consider demographics (age, gender, income, education level, occupation, and location) and psychographics (attitudes, values, lifestyles, and interests) when customizing. Program administrators may consider partnering with trusted and influential organizations to increase program visibility and credibility among diverse audiences.

**3**  ***Allocate the budget***
Determine the budget for marketing efforts, allocating resources to different tools based on their potential impact and cost-effectiveness. Consider factors such as content creation expenses and advertising costs, whether developed in-house or outsourced.

**4**  ***Define Roles and Responsibilities***
Outline the specific tasks, functions, and accountabilities of individuals or teams involved in executing the marketing plan. Assign roles and responsibilities based on expertise, experience, and capacity. See team management practices below for additional information.

**5**  ***Choose Appropriate Marketing Tools***
Select the most suitable platforms and tools for marketing the program to target audiences. Consider effectiveness and reach of tools and preferences and habits of audiences, whether tools be traditional (print media and in-person events) or digital (social media).

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**6**     ***Adhere to Branding & Messaging Guidelines***

Follow guidelines to ensure uniformity, clarity, and effectiveness. Guidelines are also to include legal and ethical guidelines governing marketing practices, including regulations related to truth in advertising, disclosures, disclaimers, and transparency requirements. To help, have readily available templates to standardize workflows and facilitate collaboration among team members.

**7**     ***Create Campaign Calendars***

Organize the creation of marketing campaigns. Set deadlines and milestones for creative assets to be used for each campaign, ensuring consistency and alignment with campaign objectives, whether that be to raise awareness, drive enrollment, or promote specific features of the ESA program.

**8**     ***Monitor and Measure Performance***

Evaluate performance against established objectives, and be prepared to adjust the marketing plan as needed based on feedback and results.

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### Team Management Practices

- ☐ Execute training program to ensure all staff understand and comply with guidelines and maintain brand identity. Train higher level staff to review all content for accuracy, consistency, legality, and ethical considerations to maintain the program's integrity and reputation.

- ☐ Employ or assign staff to oversee the marketing strategy, including conducting market research to gather insights into consumer behavior and market trends to inform the plan.

- ☐ Foster collaboration and communication among team members in various departments (e.g., marketing and customer service) to leverage diverse perspectives and expertise to improve communications.

- ☐ Empower staff to identify root causes for marketing issues and suggest solutions.

- ☐ Conduct, track and report performance audits regularly.

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### Support

The program administrator should review the marketing plan on a regular basis to ensure it remains relevant and effective. The program administrator can also make refinements based on insights gathered from performance metrics and audience interactions. Below are a few recommendations to achieve this:

- Regularly review and update marketing collateral to reflect program updates and changes.
- Regularly review data from customer interaction tools (emails, customer service hotline, social media) to identify trends where marketing efforts may be falling short. Adjust marketing plan to mitigate for these issue areas.
- Monitor media mentions and solicit input on public perception from stakeholders to gauge brand reputation and awareness.
- Stay up to date on industry trends, best practices, and emerging technologies and adapt as necessary.
- Track website traffic, social media engagement, and enrollment numbers to measure the effectiveness of marketing campaigns.

# Branding Templates

## Purpose

This section offers assets that can be downloaded and used free of charge to support branding of an ESA program or inspire marketing collateral as well as lists affordable branding and design tools for marketing and communications teams to utilize.

> ### Practical Example

## Branding Inspiration & Templates

**Palm Cards |** Download Templates

**One-Pager |**  Download Template



**WHAT IS THE**

**[INSERT SCHOLARSHIP NAME]?**

# [STATE NAME]

gives options to every learner!

**MEET THE**

[Insert Scholarship Name]?

Now, you can afford to give your child the education that fits their unique needs!

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam hendrerit nisi sed sollicitudin pellentesque. Nunc posuere purus rhoncus pulvinar aliquam. Ut aliquet tristique nisl vitae volutpat. Nulla aliquet porttitor venenatis. Donec a dui et dui fringilla consectetur id nec massa. Aliquam erat volutpat. Sed ut dui ut lacus dictum fermentum vel tincidunt neque. Sed sed lacinia lectus. Duis sit amet sodales felis.

**How much is the scholarship?**
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam hendrerit nisi sed sollicitudin pellentesque. Nunc posuere purus rhoncus pulvinar aliquam.

**Who qualifies?**
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam hendrerit nisi sed sollicitudin pellentesque. Nunc posuere purus rhoncus pulvinar aliquam. Ut aliquet tristique nisl vitae volutpat. Nulla aliquet porttitor venenatis. Donec a dui et dui fringilla consectetur id nec massa. Aliquam erat volutpat.

**How do I apply?**
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam hendrerit nisi sed sollicitudin pellentesque. Nunc posuere purus rhoncus pulvinar aliquam. Ut aliquet tristique nisl vitae volutpat. Nulla aliquet porttitor venenatis.

**WHERE CAN I USE MY**

[Insert Scholarship Name]?

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam hendrerit nisi sed sollicitudin pellentesque. Nunc posuere purus rhoncus pulvinar aliquam. Ut aliquet tristique nisl vitae volutpat. Nulla aliquet porttitor venenatis.

Learners ♥ Options

Want to know more?
Ready to apply?
Already using it & need help?

state.learnersloveoptions.org

**Social Media Ad: Application |** Download Templates
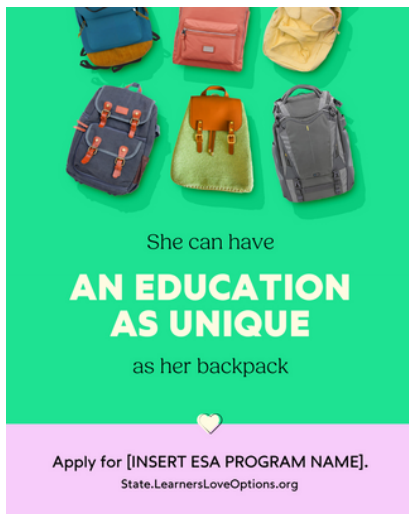



**Social Media Ad: Awareness |** Download Templates
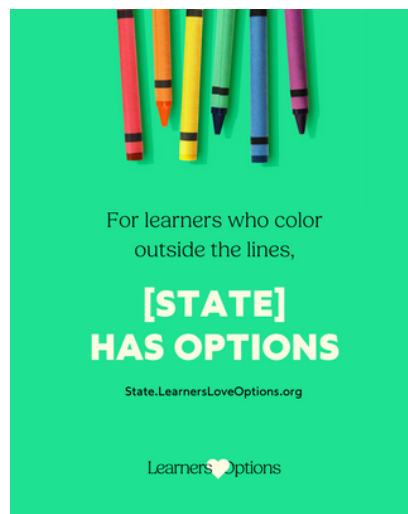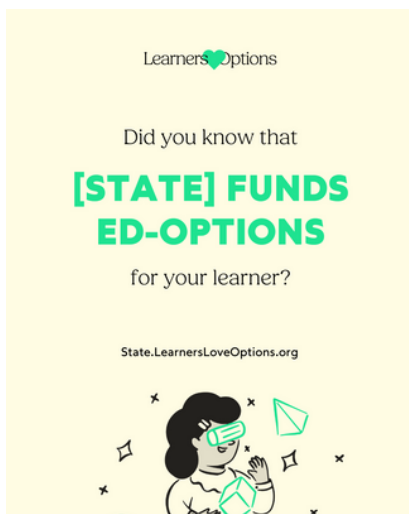
## Branding and Design Tools

Below is a list of free and affordable branding and design tools available to program administrators.

| | | |
|---|---|---|
| | **Canva** | Intuitive design tool with templates for all branding needs. |
| | **Adobe Express** | Create graphics, web pages, and video stories effortlessly. |
| | **GIMP** | Free, open-source image editor for high-quality photo manipulation. |
| | **Inkscape** | Powerful, free tool for vector graphic design and illustrations. |
| | **Figma** | Collaborative interface design tool with real-time team collaboration features. |
| | **Pixlr** | Cloud-based photo editor for quick, professional-level editing. |
| | **Blender** | Comprehensive open-source tool for 3D creation, including animation. |
| | **Google Fonts** | Extensive library of free fonts for digital and print use. |
| | **Unsplash** | High-resolution, royalty-free images ideal for any project. |
| | **ColorZilla** | Browser extension for color picking and palette creation. |

# Marketing and Communications Case Study

## Practical Example

On January 28, 2023, the Utah Fits All (UFA) Scholarship Program was signed into law, creating $8,000 customizable scholarships for 5,000 students in grades K-12. This universal ESA program covers tuition, therapies, tutoring, textbooks and curriculum, extracurriculars, education fees, public school courses, and other qualified expenses.

Utah Education Fits All (UEFA), a non-profit parent and education service provider advocacy organization: 1) rallied Utahns to support passage of the program; 2) marketed the program; 3) empowered families and providers to understand and utilize the program; and 4) protected public perception of the UFA scholarship, all efforts contributing to an expansion that doubled the size of the program from 5,000 to 10,000 scholarships. This case study details UEFA's successful marketing and communications efforts and the results.

## Approach

○ ***Pre-Apply Marketing Campaign***
After testing messaging and landing pages, UEFA discovered the core message that resonated with Utah parents was the UFA scholarship amount and its flexible use. This message was used to develop a marketing campaign to attract parents of school-aged children to "pre-apply" for the program via the UEFA website to stay informed, be involved, and receive reminders and assistance when applications opened.

Pre-applicants were captured in UEFA's Customer Relationship Management platform, HubSpot, which became the organization's central service, email marketing, contact management, analytics, and reporting tool. The pre-application marketing campaign ran seven months, allowing UEFA to establish a relationship with over 20,000 families, covering nearly every ZIP code in Utah across 125 urban, suburban and rural geographies.

More than just a marketing campaign, its purpose was to build trust and a sense of community. UEFA wanted parents to feel that they were part of an important, powerful movement. UEFA's role—advocating, supporting, informing, and empowering parents— was clearly communicated and made the difference. In turn, the organization successfully built awareness and knowledge about the program to a targeted audience of K-12 parents through a database and follow-up engagement. It seeded a community of engaged parents, demonstrated demand for the program, and ultimately helped guide families to the application portal.

○ ***Building a Community***
UEFA deployed a multi-pronged communication strategy involving webinars, social media, text, and email marketing, establishing a parent journey of engagement and continual updates. Parents and education providers received a sequence of emails upon conversion that laid the foundation for UEFA's ongoing relationship with them. Depending on when they converted, this email journey introduced important program timeline details, pressing calls-to-action, understanding UEFA's role in the UFA Scholarship and Utah education choice, and opportunities to engage further.

Additionally, events were held for two purposes. First, UEFA held events to build a sense of community and connect families with each other and with providers of educational resources and services.

### Building a Community (cont.)

Second, events were held to reach families otherwise unreached by digital marketing, primarily the at-risk communities. For this purpose, UEFA leveraged relationships to meet and present at small and large gatherings, events, and fairs, including the Utah Private Schools Association, private school leaders and families, pastors, churches, community leaders, refugee communities, homeschooling groups, and foster parents, among others. Through this, UEFA reached nearly 10,000 parents.

> *Traditional grassroots is more laborious, costly, and provides less return on investment than digital. To spend wisely, UEFA prioritized digital marketing and used events and partnerships to reach other Utah communities. This not only got the UFA scholarship in front of tens of thousands of Utah families, but we found that natural advocates and partnerships arose naturally because we connected with so many Utahns.*
>
> **— ROBYN BAGLEY, EXECUTIVE DIRECTOR, UTAH EDUCATION FITS ALL**

During implementation, some grassroots outreach was spurred by the digital marketing campaign, both by request—pre-applicants seeking more information for their communities—and organic grassroots energy from pre-applicant families. Through their webpage, UEFA offered events and educational collateral to amplify organic grassroots activity.

UEFA also registered 645 private schools and providers, of which 440 have been approved as qualifying providers for the program to date, significantly expanding educational options available to families.

### Leveraging an Online Community for Legislative Outreach

Following the pre-apply marketing campaign, UEFA activated its community to advocate. The community was activated through UEFA's weekly email communications, text messages, and social media, which families and providers came to rely on for updates after the pre-apply campaign. UEFA learned legislative advocacy doesn't require a traditional team of grassroots advocates and volunteers. Rather, UEFA effectively activated advocates at scale through digital communication.

Using a legislative outreach platform, the UEFA community highlighted the outsized number of families interested in utilizing the program. UEFA demonstrated to legislators that the community was eight-times larger than the initial allocation and represented nearly every Utah ZIP code and community. UEFA showed their community was rural, urban, small town, and suburban and interested in every type of school choice— homeschool, private, microschool, hybrid, online, partial public, and more.

As a result of these advocacy efforts, the UEFA community helped secure a near-doubling of program funding, from $42.5 million to $80 million, during the 2024 session— a year prior to the first school year of the program. This funded 10,000 scholarships for the 2024-25 academic year.

### Leveraging an Online Community to Demonstrate Demand

When the application portal launched on February 27, 2024, UEFA again activated their community and helped generate over 10,617 applications within the first 24 hours, with numbers climbing to nearly 27,270. This phase was supported by continued engagement strategies through targeted communication to encourage a strong turnout of applications, highlighting the program's demand to legislators.

## Results

Heading into program implementation, UEFA had three goals: demonstrate demand to at least double funding before the first year of the program launch, foster a grassroots advocate army, and ensure over 20,000 parents applied to aide future legislative outreach and foster program adoption. Due to the strategic approach outlined above, UEFA not only met, but exceeded these goals and set a strong foundation for the ongoing expansion and success of the Utah Fits All Scholarship Program.

> *"When you joined our movement and started this journey with UEFA, we shared that one of our top priorities is to demonstrate the enormous level of demand by Utah families for the Utah Fits All Scholarship in hopes of obtaining additional funding to serve more students. We weren't worried about achieving our ambitious goal for demonstrating demand. We already know that parents want choice when it comes to the education of their children. After all, it's Utah parents who shared their stories, testified in committee hearings, and contacted their legislators in support of the law last year. You helped make it happen!"*

— **EXCERPT FROM UEFA PARENT ACTIVATION EMAIL**

## Impact

**50** Events — Reaching over 10,000 parents and stakeholders

**640** parent and provider service tickets answered

**44,782** Messages — from Utahns to their legislators

221,280 unique views of the website

1,882+ followers

Followers: 1,316+
90-day reach: 250,000
90-day engagement: 27,530

**500+** Facebook Private Parent Group Members

Six Virtual Town Hall Webinars to date

1,866 live attendees
1,075 views of recordings

# UEFA Family Journey



**FINDING FAMILIES**

- Meta Ads
- Google Search
- Grassroot Events

UtahEducationFitsAll.org

PRE-APPLY!

CRM Database (HubSpot)

Message Testing
Engagement
Audience Behavior

**Community Engagement**
- Webinars
- Grassroots Partners
- Live Events

- Email
- Social Media
- Texts

**Program Advocacy**
- Sharing Family Stories
- Program Awareness

Scholarship funds doubled!

8x larger   demand than the 1st scholarship allocation

**Empowered Families**
- Educational Resources
- Parent Support
- Program Updates

**Driving UFA Scholarship Applications**

**10,617**   applications day 1

**27,270**   final application count

**Legislative Outreach**
- Grassroots Activation
- Demonstrating Demand