



January 2026

Growing Impact with Smarter Marketing

WHY IS MARKETING IMPORTANT?

Marketing is essential for nonprofit organizations because it connects their mission to the people who make that mission possible—donors, clients, sponsors, and referrers.

Effective marketing clearly communicates why the organization exists, who it serves, and the real impact it creates, building trust and understanding across all audiences.

For donors and sponsors, marketing demonstrates accountability and results, showing how their support makes a difference. For clients and referrers, it ensures services are visible, accessible, and credible.

Ultimately, strong marketing is not about promotion for its own sake; it is about strengthening relationships, increasing awareness, and ensuring the organization can sustain and grow its impact over time.

MISSION

Our mission is to help people with mental health and substance abuse challenges live connected and satisfying lives through productive work, meaningful relationships and direct support.

HOW DO PEOPLE FIND MENTAL HEALTH HELP?

Awareness & First Step

Self-recognition of need

Concern raised by family, school, or doctor



Trusted Entry Points

Schools/Primary Care/ Family & Adults/Counselors/ Doctors/ Parents

Social Workers/ Pediatricians/ Caregivers/ Psychologists/ Mentors



Care & Support Options

Community-Based/ Clinical Virtual/ Community mental health centers

Therapists & counselors/ Telehealth therapy/ Nonprofit organizations

Psychiatrists/ Online directories/ Support groups



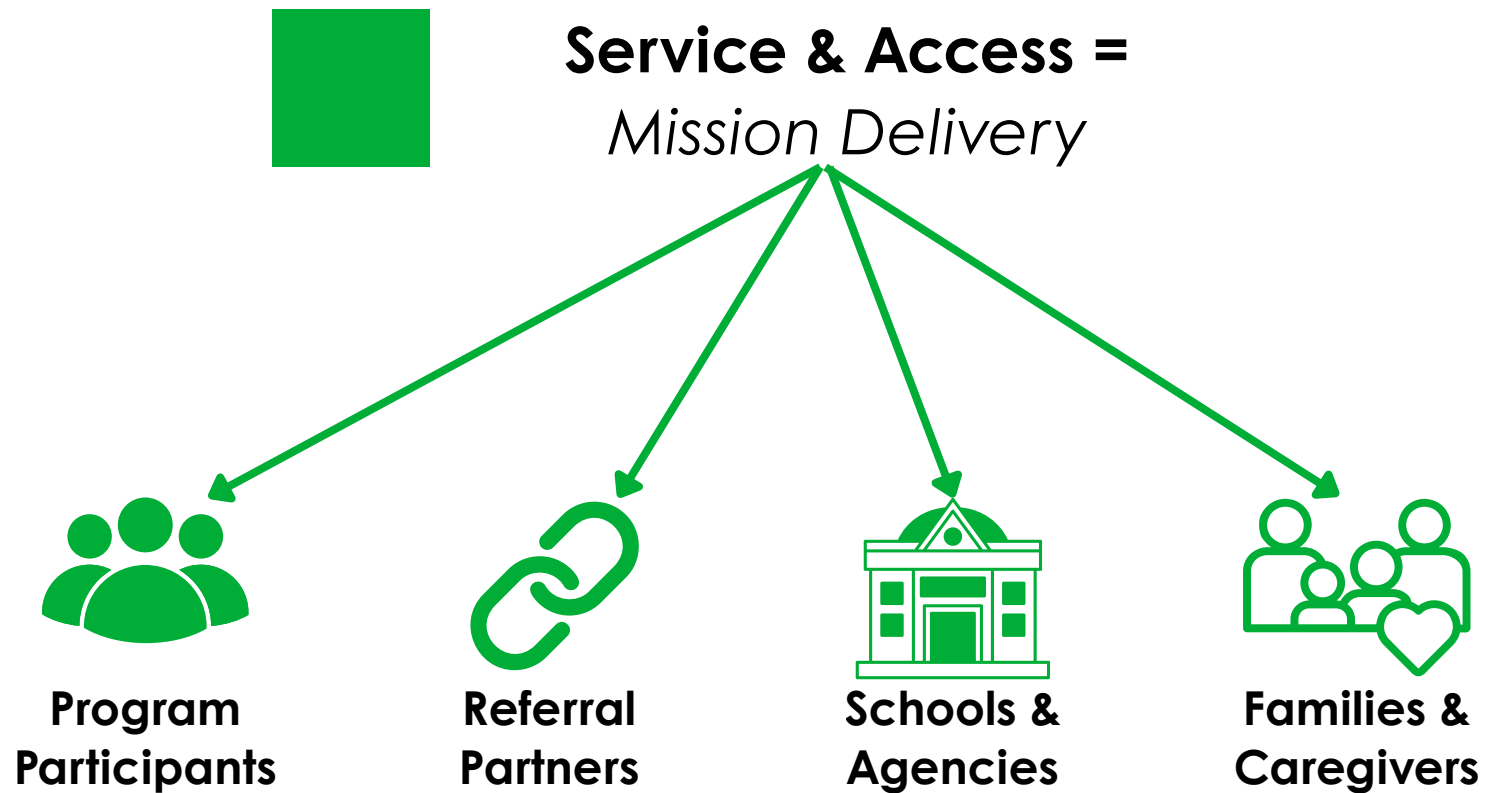
Immediate or Additional Support

Crisis & support lines (e.g., 988 in the U.S.)

Referrals from providers

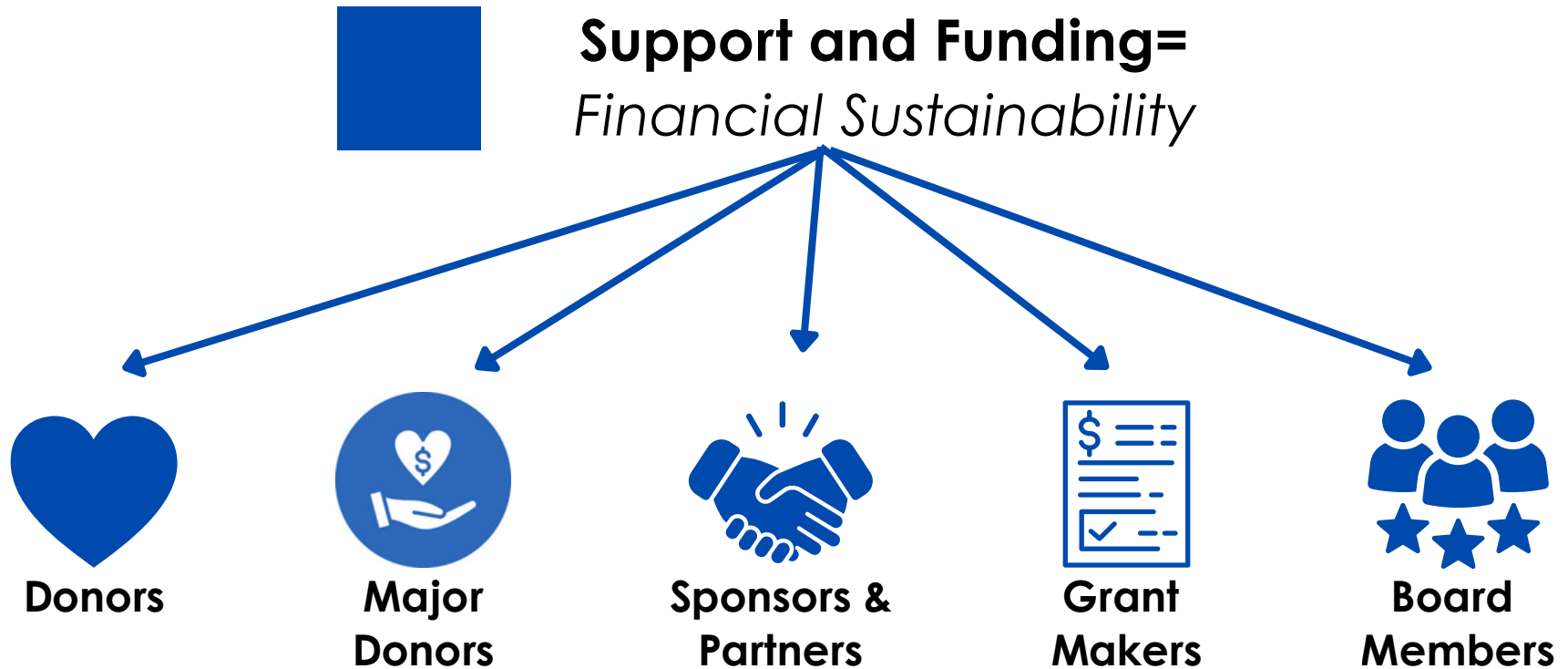
Word of mouth recommendations

WHO DO WE NEED TO TARGET?



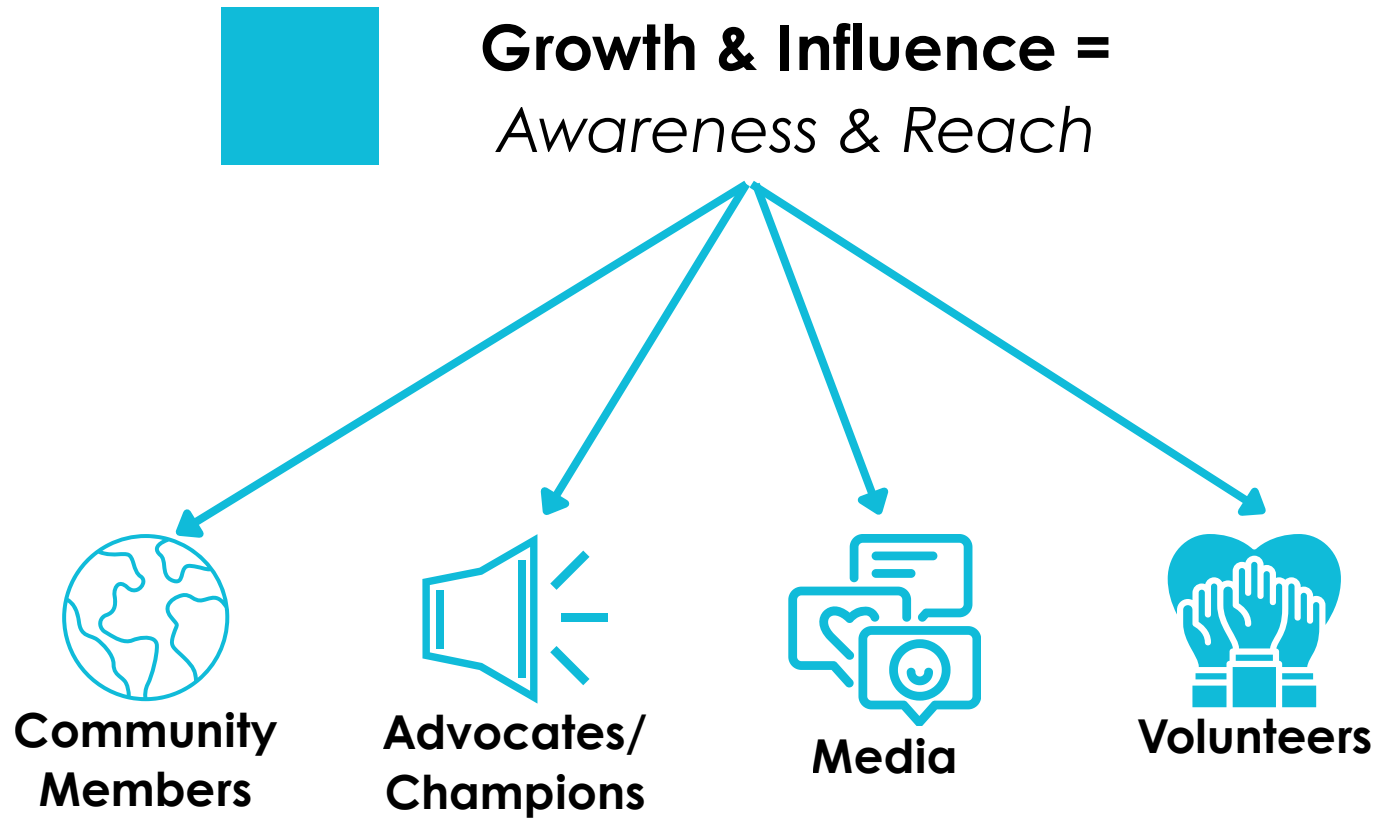
(Key Message Theme: Understanding, Trust, Accessibility)

WHO DO WE NEED TO TARGET?



(Key Message Theme: Trust, Impact, Stewardship Responsibility)

WHO DO WE NEED TO TARGET?



(Key Message Theme: Awareness, Advocacy, Engagement)

BUILDING A MARKETING PLAN

- **Clarify the Mission & Goals**
 - Define what you want marketing to achieve (fundraising, awareness, participation, referrals).
- **Identify Priority Audiences**
 - Decide who matters most right now (donors, clients, sponsors, volunteers, referees).
- **Define Key Messages**
 - Tailor clear, consistent messages for each audience while staying mission-aligned.
- **Assess Current Marketing**
 - Review what's working, what's not, and what resources you have (staff, budget, tools).
- **Select Marketing Channels**
 - Choose the best ways to reach each audience (email, social media, events, website, PR).
- **Create a Content Plan**
 - Plan stories, impact updates, calls to action, and timing.
- **Set a Budget & Timeline**
 - Align spending and effort with priorities and capacity.
- **Assign Roles & Responsibilities**
 - Clarify who owns each task and decision.
- **Launch & Execute**
 - Implement the plan consistently across channels.
- **Measure Results**
 - Track key metrics (engagement, donations, referrals, participation).
- **Adjust & Improve**
 - Use data and feedback to refine and strengthen future efforts.

Marketing Objectives

S

Specific: Clearly define the goal (what, why, and how)

M

Measurable: Ensure the goal can be tracked with numbers or data

A

Achievable: Set realistic goals that are within reach.

R

Relevant: Align the goal with broader business objectives.

T

Time-bound: Set a deadline for achieving the goal

1. Research and Identify our target personas based on current data for Summit Clubhouse and similar non profits.

Analysis of current donors, referrers, and members:

Create a target persona for each category to help develop tactics and messaging that will most resonate with them.

Outline communication tactics by target persona and develop a yearly calendar to build a communication plan

Finalize target personas by end of January, Develop communication tactics and calendar by march 1

2. Develop a toolkit that is targeted to referrers to build trust, clarity and accessibility

Review and build a database of referrers in Summit County increase current contacts by X%

Build a toolkit that can be used by members & volunteers to reach out to referrers to educate on the mission of the summit house and understand the types of patients that they think would most benefit from the services

Develop monthly visit calendar for volunteers to reach out to referrers and set up appointments for lunch and learns

january: Outline components of toolkit and develop items
February: Production of kits and begin volunteer appointment drive to set up
March: Begin Lunch and learns

3. Expanding awarness of organization using local media focus on mental health awareness month May

Increase social media following by X%

Create a mini press kit for local news outlets/social media local influencers that specialize in mental health.

Develop social shorts for the different audiences to show mission in action

12 months

4. Increase Repeat donors

5. increase partners for job placement

6. Develop an education platform for members to help with re-building

Goal

Research and Identify our target personas based on current data for Summit Clubhouse and similar non profits.



Isabel Mercado
Retired Lawyer
72 year old Baby Boomer

● ● ●
“I’m starting to plan my estate and want to give back to create a legacy”

Motivation

My brother dealt with substance abuse and never really found the resources and support he needed while clean and always ended up back in the abuse cycle.

Behaviors

Past Donations to other non profits

Strong Emotional Connection to the mission

Annual Giving Threshold

Net Worth- 3m-5m

\$10,000-\$25,000+ per year → Established major donor

What message resonates?

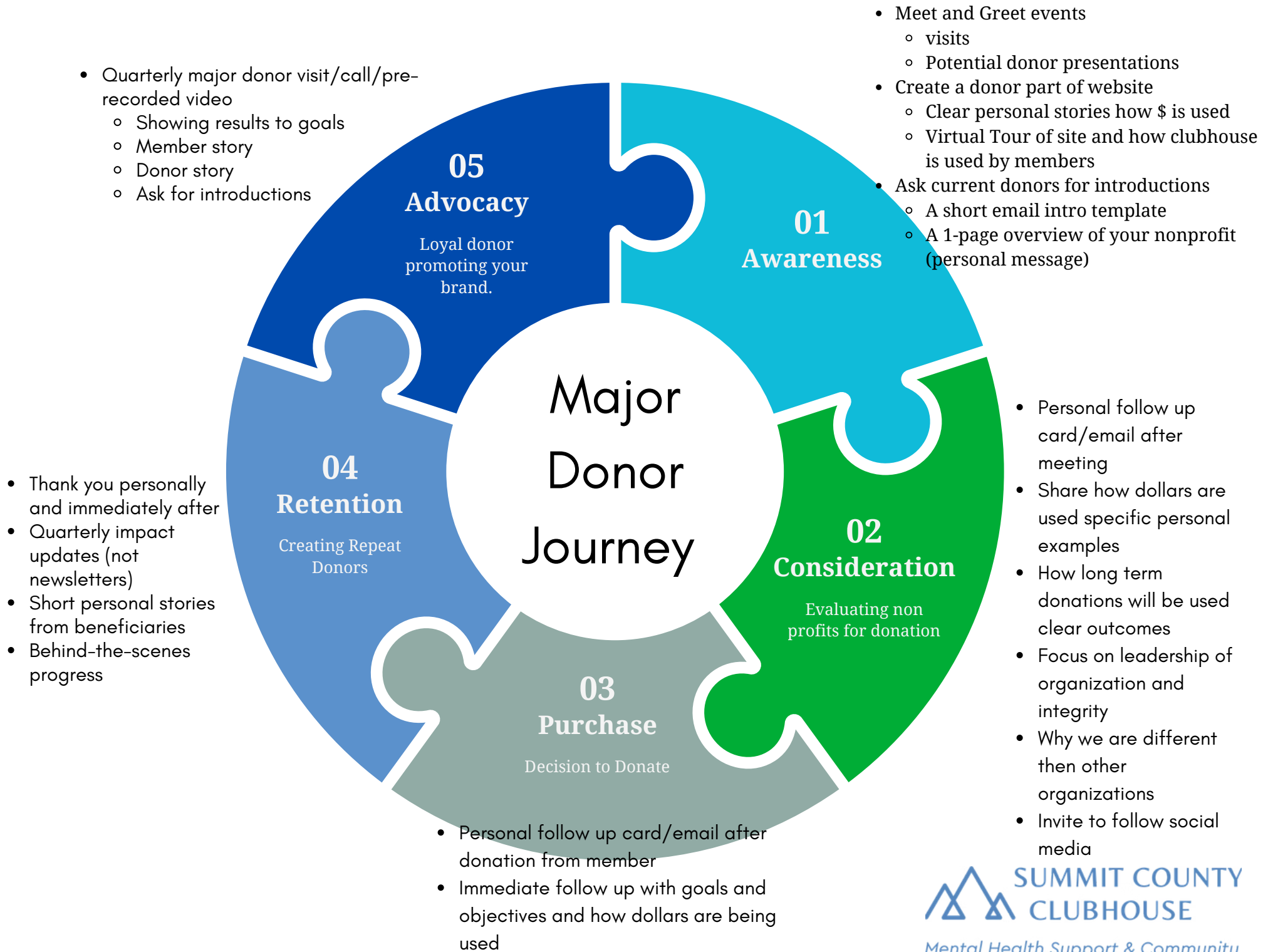
- Show me outcomes and real change
- Strengthening the community
- Be honest about what is needed with the money

What is important to me

- I am a partner not just a checkbook
- I like to know clear specific stories how my donation has made an impact

Best Approaches

- One-on-one relationship building
 - Personal emails
 - handwritten notes
 - phone calls
- Impact reports
- Site visits
- Referrals from trusted donors





Sara Lawson Clinical Therapist

Specializes in anxiety and depression disorders



“I have patients who recovering from nervous breakdowns and need support from people who have been through the same thing. Support in finding a job and a safe space to go to when they are struggling”

Why I would refer

My practice only takes certain insurance and once initial crisis is over often my patients can't get ongoing support through insurance to start re-building their life.

Behaviors

Have a vested interest in patients to help them re build their lives after a mental crisis.

What I value in a non-profit support

Accessibility- fast intake and simple process
Trust and credibility- I know how my patients are being helped and have total access for follow ups

What message resonates?

- Let us help you support your patients
- This is a partnership to get patients the best care

What is important to me

- Clear eligibility requirements
 - Help me identify who is a good fit
 - Simple referral process
- What happens after I refer my patient

Best Approaches

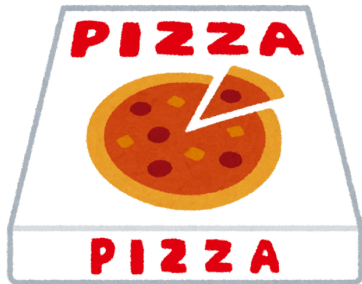
- Site visits
- Quick and easy referral process
- Ongoing communications on patient follow up
- Success stories
- Partnership events to better understand clubhouse and for referrers to be heard to share needs

Goal

Develop a toolkit that is targeted to referrers to build trust, clarity and accessibility

LUNCH AND LEARN

Bring in Lunch at referrer office



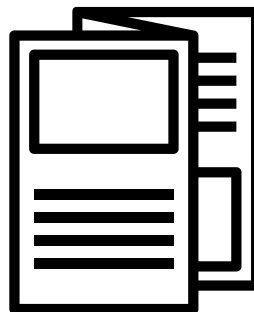
Certified volunteer or member to answer questions



video running of virtual tour of clubhouse
Member testimonials



key chains with Summit Clubhouse phone # and web site



Brochure about Summit Clubhouse
Customized to Referrers