



SOUTHEAST SERVICE COOPERATIVE
MARKETING PLAN
2016

HOW TO USE THIS DOCUMENT

This document is the culmination of markit's research, reflection, strategic discussions, interviews, and brainstorming with key Southeast Service Cooperative (SSC) stakeholders.

Objectives of this document were clarified and finalized through Southeast Service Cooperative's 2015-2016 Strategic Planning process.

The result of this collaboration is covered in this marketing plan, including:

1. Objectives and Measures
2. Identification and articulation of SSC's Competitive Advantage, Purpose, and Positioning
 - a. How SSC describes "who we are" and "what we do" in respect to each target audience
3. Definition of:
 - a. People Strategy
 - b. Services and Programs (Product) Strategy
 - c. Pricing Strategy
 - d. Placement Strategy
 - e. Promotion Strategy
4. Tactics and recommendations to achieve SSC's objectives

This marketing plan is comprised of three main sections:

Section One: Review, Research, & Discovery

Section Two: Competitive Advantage, Purpose, & Strategy

Section Three: Tactics & Implementation



EXECUTIVE SUMMARY

Created in 1976, the Southeast Service Cooperative (SSC) is a public, non-profit cooperative serving 11 counties in southeast Minnesota. Comprised of over 80 public and private school districts, cities, counties, and other member organizations, SSC is authorized under Minnesota School Law 123A.21.

The Southeast Service Cooperative Board of Directors is composed of an elected group of representatives. The Administrators Advisory Committee is comprised of school superintendents to provide feedback and guidance to the Board and SSC staff to assure SSC acts on behalf of the members' best interests.

Southeast Service Cooperative is dedicated to maximizing resources and increasing value through collaboration. Since 1976, it has been delivering innovative programs for administrators, educators, students, parents, and community members.

Southeast Service Cooperative's program and service offerings are numerous, yet SSC struggles to fully maximize member utilization. Overly complex program and service categorization, a lack of clear and concise messaging that speaks to member needs, and the prioritization of educational programs and services (at the expense of other opportunities) all contribute to this challenge.

Southeast Service Cooperative has an opportunity to build upon its member-focused dedication and history in a number of ways. These include improving its members' understanding of SSC, clearly articulating its program and service offerings with clear, concise messaging (both internally and externally), fostering deeper relationships with members by anticipating needs and meeting members where they are, and strengthening a community of collaboration.



SECTION ONE: REVIEW, RESEARCH, & DISCOVERY

This section provides a cursory overview of the background work leading to subsequent sections and recommendations contained in this plan.

This section provides the baseline review, research, and discovery undertaken and completed. For clarity and brevity, this section is a compendium and is intended to provide essential background information about the work, observations, and conclusions that led to Sections Two and Three of this marketing plan.

Who Uses This Section:

Leadership and key Southeast Service Cooperative stakeholders.

How to Use It:

It is recommended this section is reviewed by decision-makers and key stakeholders. Review should pay particular attention to the SWOT Analysis and External Review, with updates and revisions made accordingly based upon internal and/or external changes.

Review:

Every 12-18 months.



MARKETING OBJECTIVES

OBJECTIVES AND REPORTING:

2015-2016 Bold Step: Develop and implement strategies to meet members where they are by facilitating face-to-face connections.

- 1. Quantitative Measures** (assess monthly when possible with quarterly reviews)
 - a. Number of face-to-face interactions with SSC as a direct result of improved communication strategies to be implemented 1.1.2016
 - b. Number of interested participants for Principal/Local Government advisory groups
 - c. Number of completed member visits at member location(s) and number of SSC programs and services discussed during the visit(s)
 - d. Needs assessment (pre- and post-workshop discussions facilitated by staff)
- 2. Qualitative Measures** (assess monthly when possible with quarterly reviews)
 - a. Feedback from stakeholders (Board/SAC, New Advisory Groups, Staff, etc.)
 - b. Referral rating measure
 - c. Engagement of members during visits

2015-2016 Bold Step: Clarify, simplify, and individualize SSC messaging, speaking to unique member needs.

- 1. Quantitative Measures** (assess monthly when possible with quarterly reviews)
 - a. Website analytics, open/click rate data from News You Can Use/ Connection distribution message
 - b. Number of email bounces
 - c. Participation levels
 - d. Number of differentiated email campaigns produced
 - e. Number of Facebook likes
- 2. Qualitative Measures** (assess monthly when possible with quarterly reviews)
 - a. Feedback from staff regarding confidence in sharing updated elevator speech(es)
 - b. Feedback from stakeholders (Board, SAC, Staff, etc.) on new website and marketing literature
 - c. Evaluation comments
 - d. Expressed value of the participation study



INTERNAL REVIEW

SSC Job Functions and Levels of Responsibility

November 2015

Governance

Board of Directors

The care, management, and control of the SSC is vested in the Board of Directors composed of ten members elected from the eleven-county membership area as follows: Seven positions will be filled by current officials of boards of education of school districts who represent SSC Education members. Three positions will be filled by individuals who are not currently serving on a local school board, who have been nominated by a SSC Government Unit voting member, and who are current elected officials, appointed officials, or other employees of a member local government organization. Election of members to the Board of Directors shall be by vote of all elected individuals serving on governing boards of voting members of the Cooperative, with each individual having one vote.

Current Board Members:

- Carol Crevath, Chair, Plainview-Elgin-Millville Public Schools
- Theresa Amick-Kruger, Vice-Chair, Houston County
- Susan Phillips, Treasurer, Freedom County (retired)
- Al Nelson, Clerk, Wabasha/Kellogg Public Schools
- Mary Blair-Hoelt, City of Bryon
- Michael Christensen, Red Wing Public Schools
- Brian Grudem, Zimmerman-Mazepa Public Schools
- Beth Lawson, Stearns County Public Schools
- Molly Rieke-Hofschulte, Dover-Eyota Public Schools
- Marilyn Syverson, Kenyon-Wanamingo Public Schools

Policy F12 F11

Suzanne Riley

Executive Director (F12)

- Organizational planning, innovation, and visioning leadership
- Member needs assessment and communication
- Partnership and collaboration development
- New Program/Service development
- Continuous improvement for existing program/service
- Board of Directors policy development and governance
- Health and Benefits: Directs benefits consultant, communications and planning with group leaders and advisory groups, pool management
- Fiscal planning and accountability
- Human resources planning and management
- MSC statewide leadership, planning, and program implementation
- HR Supervisor, coach and mentor
- SSC Admin Team member

Consultants

Bill Colopoulos

Next Generation Benefit Solutions, LLC

Health and Benefits

- Group leaders and local committee benefits analysis and plan design
- Consults with SSC staff in pool management and planning
- Collaborates with other MSC consultants statewide

(IEA) Institute for Environmental Assessment

Pat Weir, Manager and Staff

Environmental Health & Safety Management

Consultants

Statewide Health and Benefits, Lobbying

Ann Clark

Minnesota RCE Program Manager (MDE)

Statewide leadership and development

Program E10 E9

Dale Walston

Director of Operations (E10)

- Organizational budget development and monitoring
- Management of investments, client, and vendor accounts
- Guides staff in program budgeting and planning
- Operations planning
- Facility and technology planning and management
- Fiscal management of health insurance pools
- Administrative Services: Cooperative Purchasing, EHSM, Benefit Services
- HR Supervisor
- SSC Admin Team member

Amy Grover

Director of Planning (E10)

- Organizational strategic planning and continuous improvement leadership
- Governance support
- Superintendent SAC Lead
- Communications and marketing strategy
- Business development
- Process improvement
- Database management
- Professional Development team leadership
- Grant proposal writing
- Strategic/systems planning consulting for members
- HR Supervisor
- SSC Admin Team member

Katie Schmitt

Development and Innovation Specialist (E9)

- New program/service development exploration, design, budget, planning, implementation, evaluation
- Existing program/service enhancement and expansion
- Process improvement
- Support staff innovations
- Partnership building
- Member relations
- Organizational strategic planning support
- SSC Admin Team member

Jane Drennan

Director, Regional Center of Excellence (E10)

- RCE activity planning and development with MDE
- Specialist Team Leadership: advocate assignment, professional development, mentoring
- RCE management, reporting, evaluation

Center of Excellence

- Advocates/Specialists (E9) Reading, Math, Equity, ELD, Special Ed, Implementation Science, ELD, State Data
- Onsite technical assistance
- Improvement plan support
- Leadership and staff professional development
- Coaching and best practice

Barb Marchetti

RCE Systems Improvement Specialist (E9)

- Specialist Team Lead: coordination, coaching, supervision

Bob Tweten

Health & Safety Specialist (E9)

- Pseudo-OSHA walk-throughs
- Facility, environmental and occupational regulation support
- Facility project levy assistance

Interpretive D8 D7

Katie Hartman

Program Manager (D7)

- Student Academics: Spelling Bee, YAYA Middle and Elementary, Science and Nature, Knowledge Bowl
- School Climate Improvement
- Professional Development team; coordinate sessions
- Technology trainer
- General admin support

Kirsten Kuehl

Program Manager (D7)

- Student Academics: YAYA Elementary, Knowledge Bowl, MSC SA Representative
- Non-mental contracting, Admin CEU applications, registration
- Dental reimbursement support
- WLMC support
- General admin support

Sarah Ness

Program Manager (D7)

- Promote Cooperative Purchasing Program
- MSC CPC Representative
- Manage purchasing contracts; solicit proposals, evaluate, negotiate, award, market contracts
- Supports Express site
- Member site visits

Nicole LaChapelle

Program Manager (D8)

- Health and Wellness
- Coordination: SHIP consultant/trainer, SSC wellness program, pool group wellness support, health pool support
- Professional Development team; coordinate sessions
- Marketing and Communications: newsletter, member email distribution, website, flyers
- WLMC business development
- General admin support

Kari Kubicek

Program Manager (D8)

- School Climate Improvement
- Safety and Security programs
- SafeSchools online courses
- Moodle server support
- PBIS training and facilitation
- Principal Advisory Lead
- Professional Development team; coordinate sessions
- MSC PD Representative
- Grant proposal writing
- MASA Region 1 coordination
- General admin support

Process C6 C5

Chris Hancock

Bookkeeper (C6)

- Accounts receivable and payable, other fiscal processes and planning support, support staff workflow training
- Annual membership usage report compilation and preparation
- Fiscal policy and procedure development
- Cooperative Purchasing and Health/Benefits Program fiscal support

Peggy Merkel

Meeting Center Coordinator (C6)

- Wood Lake Meeting Center daily operations coordination
- Rental contracting and scheduling; database maintenance
- Business development, communications, and marketing
- Customer service, technology support, and client satisfaction
- Workflow coordination with other WLMC staff

Operational B4 B3

Donna Dickson

Meeting Center Assistant (B4)

- Wood Lake Meeting Center daily operations and technology support
- Workflow coordination for room and meeting setup and cleanup
- RCE (Center of Excellence) support
- Reception and database update support
- Facility internal/external maintenance and vehicle support

Sue Haddad

Organizational Assistant (B4)

- Accounting, receipts, payables, WLMC billing, vehicle fleet support
- Instructional and Admin Services Support: Cooperative Purchasing support, registration and financial processing, marketing assistance, database updates and member research, PBIS support, Mobile Science Lab coordination

Defined A2 & A1

Meeting Center Setup Assistant (A2) – Open Position; Part Time

Advisory

Superintendent Advisory Committee (SAC)

Responsibilities:

- Advise the Board of Directors and staff on issues important to the membership.
- Serve as a liaison with administrators of member organizations.
- Consider proposals for services and programs and make recommendations to the Board of Directors regarding service delivery and general operations.

School & Local Government Formula Committee

Responsibilities:

- Help SSC staff develop a recommended pool adjustment formula that calculates into the new plan year rates, considering stop loss information and level, RSR margin information, options for formula adjustments, and wellness programming support.

Local Government Advisory Committee (LGAC)

Responsibilities:

- Advise the staff on issues important to the membership.
- Discuss specific public-agency challenges and gain input on resources or possible solutions.
- Evaluate possible programs and services that could meet local government needs or facilitate cross-sector collaboration.

Principal Advisory Committee (PAC)

In Development



INTERNAL REVIEW: PROGRAMS & SERVICES - EDUCATION

Instructional Programs & Services:

1. Professional Development (Training, Resources, Regional Networking)
2. Teacher Resources
 - a. StandardInsightMN
 - b. Mobile Science Lab
3. School Culture and Climate
 - a. PBIS (Positive Behavior Interventions and Support)
 - b. School Climate Improvement Project
 - c. School Safety Resources
4. School Leadership Support
 - a. Strategic/Systems Planning Facilitation
 - b. World's Best Workforce Resources
 - c. MASA Region 1 Support
 - d. Legislative Forums
5. Southeast/Metro Center of Excellence
6. Student Programs
 - a. Knowledge Bowl
 - b. Regional Spelling Bee
 - c. Science and Nature Conference
 - d. Young Authors, Young Artists Conferences

Administrative Support Services:

1. Cooperative Purchasing Connection
2. Insurance and Benefits
 - a. Health Insurance Pools
 - b. Plan Design and Management Services
 - c. ACA Compliance Assistance
 - d. Ancillary Services
 - e. Dental Reimbursement Program
 - f. Employee Assistance Program
 - g. Health Forums
 - h. Worksite Wellness
3. Environmental Health and Safety
 - a. Online Health and Safety Compliance Classes
 - b. Environmental Health and Safety Management Assistance
 - c. Environmental Health and Safety Consulting (IEA)



INTERNAL REVIEW: PROGRAMS & SERVICES - LOCAL GOV'T

Instructional Programs & Services:

1. Professional Development
2. Strategic/Systems Planning Facilitation

Administrative Support Services:

1. Cooperative Purchasing Connection
2. Insurance & Benefits
 - a. Health Insurance Pools
 - b. Plan Design & Management Services
 - c. ACA Compliance Assistance
 - d. Ancillary Services
 - e. Dental Reimbursement Program
 - f. Employee Assistance Program
 - g. Health Forums
 - h. Worksite Wellness
3. Environmental Health and Safety Consulting



INTERNAL REVIEW: STRENGTHS

1. **Quality & Value:** We provide and/or facilitate high value services and programs.
2. **Relationships:** We are member-focused and nurture quality connections. Our members' needs always come first.
3. **Responsiveness:** We respond to the needs of our members and our coworkers.
4. **Effective Leadership:** Leadership is experienced and effective.
5. **Service Efficiency:** We understand and connect members to the right resources.
6. **Operational Efficiency:** We fully maximize our small staff.
7. **Coordination & Processes:** We maintain successful coordination and implementation of processes.
8. **Great Facility:** Our recently remodeled and expanded Wood Lake Meeting Center provides a learning environment, and our offices are organized to support both independent and team work.
9. **Teamwork:** We work well together and pitch in to help.
10. **Reputation:** Our good reputation is based on our commitment to cultivating mutually beneficial partnerships and consistently providing high-quality programs and services.
11. **Experience:** We are knowledgeable in our industry with relevant expertise.
12. **Agility:** We adapt quickly and change course to meet member needs.
13. **Workplace Flexibility:** Internally, we support work/life balance for employees.
14. **Center of Excellence:** Hosting the Southeast/Metro Regional Center of Excellence and the MN RCE Program Manager allows low-proficiency schools in our region to access a cadre of instructional experts while also building credibility.



INTERNAL REVIEW: WEAKNESSES

- 1. Strained Resources:** Our small team maximizes resources, but is often stretched thin by wearing too many hats.
- 2. Difficulty Saying “No”:** Because we are member-focused, we tend to take on too much in order to accommodate requests.
- 3. Lack of Organizational Focus:** We need to focus on what we excel at rather than trying to meet all members’ needs regardless of capacity or fit. We try to be all things to all members.
- 4. Leap Before We Look:** We sometimes jump into programs too quickly and do not follow our own documented processes. We occasionally base our assumptions off member “needs” on one or two requests or suggestions.
- 5. Preview/Vetting Related to Professional Development:** We cannot always preview presenters, content, resources, etc.
- 6. Lack of Classroom Experience & Expertise:** Currently, within the SSC-Rochester team, we do not have licensed educators with experience in coaching, K-12 classroom instruction, and professional development.
- 7. External Member Limitations:** Members are limited by funds, time, initiative overload, and/or differing priorities.
- 8. Under-Utilization of Member-Driven Programs:** The Advisory Committee suggests a service, SSC researches, creates, and offers – then districts that expressed interest choose not to participate.
- 9. Programming Emphasis:** Traditionally focused on the education members.
- 10. Limited Scope of Awareness:** We haven’t successfully brought comprehensive awareness of the full scope of programs and services that SSC offers. In particular, individuals employed within member agencies aren’t aware of how we support them and their organization.



EXTERNAL REVIEW: COMPETITIVE REVIEW

After reviewing potential competitors, it is evident no other local organization *directly* competes with Southeast Service Cooperative *at an organizational level*. No other local organization offers access to comprehensive programs and services as a whole.

Southeast Minnesota Education Districts or Similar:

1. Goodhue County Education Districts
2. Hiawatha Valley Education District
3. Zumbro Education District
4. Cannon Valley Special Education Cooperative (beginning 2016-2017)
5. Southern Minnesota Education Consortium

Education districts and special education cooperatives have a more limited focus on special education with student outcomes as the first priority. They provide direct services relating to classroom instruction and best practices, which differentiates them from SSC, where we primarily facilitate. However, in some instances, they compete with SSC on a program level.

Other Minnesota Service Cooperatives:

1. Southwest/West Central Service Cooperative
2. South Central Service Cooperative
3. Metro ECSU
4. Resource Training and Solutions
5. National Joint Powers Alliance
6. Northeast Service Cooperative
7. Northwest Service Cooperative
8. Lakes County Service Cooperative

Other Minnesota Service Cooperatives share similar challenges to those SSC faces. All Service Cooperatives offer similar programs and services, are member-focused with similar membership categories, and support collaboration to reduce costs for members. Some Service Cooperatives have a better online presence than others; however, some struggle with effective, clear, concise, and understandable messaging.



EXTERNAL REVIEW: COMPETITIVE REVIEW (continued)

Instead of viewing other Minnesota Service Cooperatives as competition, we should continue to enhance statewide collaboration and view each region as a potential partner to address the needs of members. Increased cooperation can further leverage and position SSC as a leader dedicated to member needs.

Large Member Districts:

1. Rochester
2. Northfield
3. Owatonna
4. Red Wing
5. Winona
6. Austin
7. Albert Lea
8. Faribault

Large member districts present a unique challenge as well as an opportunity for SSC. Due to their size, they often have enough resources to create and internally administer programs and services similar to those offered by SSC (e.g. professional development, health and safety, etc.). As a result, SSC may be viewed by individuals in some positions/roles within these districts as competition while others may view SSC as non-essential.

There is an opportunity for improved messaging and communication about the programs and services provided by SSC, as well as strengthened relationships with key contacts at specific school buildings within large member districts and at the district office level.

Note: At the individual program and service level, SSC has competitors that could impact SSC as a whole. As part of next steps, each program and service will conduct a competitive review to identify impacts at the organizational and program-specific level.



EXTERNAL REVIEW: OBSERVATIONS & INDUSTRY TRENDS

- 1. Target Audience Partitioning:** Other Service Cooperatives (and similar regional organizations and educational service agencies) highlight services targeted to parents, students, and educators.
- 2. General Increase in Technology Use:** There is more demand for electronic access to resources, including just-in-time online classes, webinars (live and/or recorded), curated links, resource downloads, as well as requests to participate in sessions via distance technology (e.g. ITV).
- 3. Readily Available Information:** The internet puts information at our members' fingertips. The "cost of searching" has gone down, allowing users to self-educate, research options, and explore a greater breadth of resources available.
- 4. Analytics:** Leveraging data to target services in order to meet the diverse needs of educational service coops and local school districts, and to make data-driven decisions an ongoing trend.
- 5. Partnerships:** Programs and services are increasingly developed—not only with members, but also with suppliers and vendors in mind—to share expertise to better fulfill member needs.
- 6. Needs Assessment:** Continuous member feedback is becoming increasingly essential to provide the programs, products, and services members need.
- 7. Changing Customer Demands:** Demand and desire for customization is increasing.
- 8. Student Achievement:** Many educational service agencies focus more on students and direct service tied to achievement.



EXTERNAL REVIEW: THREATS

1. **Shifting Legislative Landscape:** Constant changes, unfunded mandates, and/or short-term grant programs impact our ability to meet future member needs.
2. **Options:** At a program level, members can secure services elsewhere.
3. **Online Learning Resources:** Increasing number of online adult learning options.
4. **Funding:** Securing long-term financial security can be tenuous (grants end, etc.), so Southeast Service Cooperative needs to diversify revenue to reduce its reliance on insurance-based revenue.
5. **Time & Financial Considerations of Members:** Members' decisions are affected by time limitations and financial considerations—value is top of mind.
6. **Confusion:** Program and service relationships are confusing—internally and externally.
 - a. Inconsistent descriptions of programs and services threatens our ability to clearly communicate value—internally and with members.
 - b. Limited member knowledge/understanding of the full scope of programs and services provided by SSC results in not maximizing use.
 - c. The amount of information SSC provides members is overwhelming. Members are required to sift through *all* information for relevancy.
 - d. We compete for attention amongst all the communications being sent by competitors and other organizations.



EXTERNAL REVIEW: OPPORTUNITIES

1. **Evaluate** organizational branding.
2. **Reorganize and reclassify** the structure/classification of programs and services.
3. **Communicate with clarity** to make messaging more efficient and clear.
4. **Be accessible** to meet members where they are.
5. **Identify and diversify** by evaluating our membership recruitment process.

Note: More details and specific tactics for each of these opportunities is outlined in Section Three: Tactics and Implementation.



SECTION TWO: COMPETITIVE ADVANTAGE, PURPOSE, & STRATEGIES

This section identifies Southeast Service Cooperative's competitive advantage and purpose, and articulates how Southeast Service Cooperative expresses and lives our purpose by articulating our:

1. Elevator Speech
 - a. Professional
 - b. Informal
2. Ideal Member Characteristics
3. Membership Categories and Target Audience
 - a. Voting Members – Education and Local Government
 - b. Non-Voting Members – Associate Members and Non-Profits
4. Strategies
 - a. People Strategy
 - b. Services and Programs (Product) Strategy
 - c. Placement Strategy
 - d. Pricing Strategy
 - e. Promotion Strategy

How to Use This Section:

Assess and guide decisions about opportunities/changes in the market to assure SSC remains true to its purpose and positioning to leverage its competitive advantage.

Review/Utilize:

As needed when operational/organization decisions are required. Consult during regularly scheduled leadership meetings.



COMPETITIVE ADVANTAGE & PURPOSE

Competitive Advantage:

Access – We provide centralized access to the expertise and resources our members need. If we do not currently offer a program or service, we collaborate with experts to meet the expressed needs of our members.

Purpose:

Planning on a regional basis, addressing specific priority needs, and facilitating collaboration when a need can be better met through the Service Cooperative than through the member individually, pursuant to M.S. 123A.1.

Tagline:

Facilitating access to what matters.

Mission Statement:

Driven by the needs of our members, we provide support, services, and solutions that increase value, maximize resources, and promote continuous improvement.

Vision Statement:

Shaping the future for communities of leaders and learners.

Core Values:

1. **Integrity:** We carry out our work with high levels of responsibility, accountability, and ethics.
2. **Excellence:** We are forward-thinking, competent, efficient, and effective.
3. **Relationships:** We facilitate collaboration with respect and passion to serve.

SSC Aims To Be A:

1. Model of successful collaboration.
2. Purchasing network to save members money.
3. Regional resource to enhance learning.



HOW WE LIVE OUR PURPOSE & ELEVATOR SPEECH

How We Live It:

We always have our members' needs and best interests in mind. We are advocates for our members and SSC as an organization first, and for the specific programs and services we represent second. We understand where SSC is going as an organization. We are actively and collaboratively engaged to move our members and SSC toward their goals.

Elevator Speech:

"I work for Southeast Service Cooperative. We are a public non-profit dedicated to serving our education and local government member needs by providing access to what matters—services, support, and solutions—while maximizing resources through collaboration."



IDEAL MEMBER CHARACTERISTICS & MEMBERSHIP CATEGORIES

IDEAL MEMBER BEHAVIORS AND CHARACTERISTICS:

1. Recognize the benefit of being part of a member-owned organization.
2. Understand and articulate the value SSC provides and share that information within their organization as well as with other partners (professional organizations, peer networks, within their communities, etc.).
3. Encourage people within their organization to utilize SSC's services.
4. Use SSC programs and services on a regular basis.
5. Utilize SSC as their first source for programs and services.
6. View SSC as a partner committed to helping them achieve their own goals.
7. Share feedback to improve future programs and services.

MEMBERSHIP CATEGORIES

Voting Members:

Education Member – Open to all public school systems in the 11-county region of Southeast Minnesota that elect to pay the membership fee determined by the Board of Directors.

Local Government (Governmental Unit) – Open to all cities, counties, and other governmental units as defined in M.S. 471.59 (Joint Exercise of Powers) that elect to pay the membership fee determined by the Board of Directors.

Non-Voting Members:

Associate Member – Associate (non-voting) membership is open to non-public school administrative units and other partnership agencies. A public school district in the Southeast Service Cooperative primary area of service may elect associate membership status only if it is paying a membership fee to be a member of another service cooperative, or if it is a charter school with an enrollment of less than 300 students.

Non-Profit Member – Non-profit (non-voting) membership is open to non-profit organizations.



TARGET AUDIENCES & RECOMMENDED KEY MESSAGING

GENERAL KEY MESSAGES:

1. A resource for our members.
2. Driven by our members' needs.
3. We remain current on trends that impact your organization.
4. Together we find solutions that bring positive results.
5. An essential partner.

TARGET AUDIENCE KEY MESSAGES

Education Members:

1. A passion to serve.
2. Innovating to better serve our members.
3. What matters to members, matters to us.
4. Better. Together.

Local Government:

1. A model of successful collaboration.
2. Continuous improvement through collaboration.
3. Innovating to better serve our members.

Associate Member:

2. A passion to serve.
3. Innovating to better serve our members.
4. What matters to members, matters to us.
5. Better. Together.

Non-Profit Member:

1. A passion to serve.



STRATEGY STATEMENTS

People Strategy:

Southeast Service Cooperative identifies, hires, develops, and retains people with a passion to serve our members and one another. We connect members to one another and leverage relationships to build a stronger organization.

Services and Programs (Product) Strategy:

Southeast Service Cooperative identifies, coordinates, facilitates, and provides access to what matters to our members. Driven by their needs, we provide a diverse range of value-added services and programs, helping shape communities of leaders and learners.

Pricing Strategy:

Southeast Service Cooperative is member-focused. Dedicated to sustainability and efficiency, our pricing strategy balances the value we provide our members with our operational expenses.

Our pricing strategy allows Southeast Service Cooperative to reinvest in our members, staff, programs, and services to continually improve.

Placement Strategy:

Southeast Service Cooperative provides our members direct and responsive access to our expertise (whether in-person or through the use of technology) to foster meaningful relationships.

Promotion Strategy:

Southeast Service Cooperative identifies and anticipates the unique and changing needs of our members. We are advocates for our members and provide timely, concise, and meaningful communication.



SECTION THREE: RECOMMENDED TACTICS & IMPLEMENTATION

This section provides the crucial implementation steps for the day-to-day operational framework and steps to live SSC's competitive advantage and purpose, as well as implement, execute, and carry out the actions necessary to achieve SSC's objectives.

Though detailed, this section requires additional planning, coordination, and implementation. Constant implementation across SSC is necessary for these tactics to be effective.

How to Use This Section:

Follow recommended steps/outlines, providing feedback to appropriate leadership to refine and improve processes/execution steps.

Review/Utilize:

Utilize daily for consistent implementation of communication and marketing activities. Review/discuss at every regularly scheduled SSC staff or team meeting. More frequent and consistent feedback will improve the process and increase effectiveness.

Note: These are recommended next steps provided by market to the SSC staff.



TACTICS & IMPLEMENTATION: PEOPLE

PEOPLE STRATEGY:

Southeast Service Cooperative identifies, hires, develops, and retains people with a passion to serve our members and one another. We connect members to one another and leverage relationships to build a stronger organization.

PEOPLE TACTICS:

- 1. Define ideal coworker competencies, characteristics, strengths, talents, and behavior expectations.**
- 2. Review and refine interview process.**
 - a. Add questions that reflect objectives of the business and marketing plan for specific services and programs.
 - b. Extract values and work ethic to evaluate whether the individual is a good fit for SSC's climate and culture.
- 3. Invest in retaining high-quality staff that are confident promoting SSC.**
 - a. Review current positions and team responsibilities.
 - i. What type of work do individuals excel at and enjoy doing?
 - ii. In what areas are staff engaged or disengaged?
 - iii. How do individuals define their ideal day?
 - b. Identify what resources are needed to develop staff knowledge and skills.
 - c. Increase knowledge of SSC as an organization.
 - i. Emphasize organizational mission, vision, and values.
 - ii. Provide everyone with a common language and universal messaging.
 - iii. Improve internal awareness and understanding of program and service offerings.
- 4. Review PODP and continuous improvement processes to highlight expectations related to customer service and marketing/advocacy.**
- 5. Leverage relationships throughout our organization.**

Collaborate with the Board, SAC, PAC, and LGAC members to engage with low usage members, new members, and prospective members.



TACTICS & IMPLEMENTATION: SERVICES & PROGRAMS (PRODUCT)

SERVICES & PROGRAMS (PRODUCT) STRATEGY:

Southeast Service Cooperative identifies, coordinates, facilitates, and provides access to what matters to our members. Driven by their needs, we provide a diverse range of value-added services and programs, helping shape communities of leaders and learners.

SERVICES & PROGRAMS (PRODUCT) TACTICS:

2015-2016 Bold Step: Develop and implement strategies to meet members where they are by facilitating face-to-face connections.

1. Create better networks with, and within, member organizations.

- a. Determine how to identify decision-makers within our member organizations, per program and service SSC provides.
 - i. In-person regional and cluster meetings.
 - ii. Utilize technology to expand and deepen relationships.
 - iii. Leverage Board and Advisory Committees.
- b. Evaluate existing needs assessment tools and develop a comprehensive formal and informal process for members to share feedback.
- c. Leverage partnerships with other entities and work collaboratively with vendors to meet member needs.

2. Review existing partners and potential partners and/or vendors.

- a. Identify where value is with current partners.
 - i. For our members and stakeholders (students, community, the Board).
 - ii. For Southeast Service Cooperative.
 - iii. For our partners and/or vendors.
 - b. Identify where value is with potential partners.
 - i. Define our decision criteria.
- (continued)



TACTICS & IMPLEMENTATION: (continued)

SERVICES & PROGRAMS (PRODUCT)

- ii. Create a partner worksheet to follow when evaluating potential.
 - What need/gap do they fill?
 - What benefit do they provide our members?
 - What benefit do they provide SSC?
 - How does SSC benefit them?

2015-2016 Bold Step: Clarify, simplify, and individualize SSC messaging, speaking to unique member needs.

1. Review and improve the structure/organization of programs and services.

- a. Evaluate what programs to keep and what to restructure or eliminate.
 - i. Develop evaluation criteria.
 - Assess supply and demand.
 - Evaluate position on value chain.
 - ii. Evaluate programs and services based upon our members' needs.
 - iii. Understand what programs are under-utilized.
 - iv. Determine where the largest internal opportunities exist.
 - v. Review what programs are for revenue and what programs are benevolent/structure for cost recovery only.
- b. Reorganize programs and services into more clearly articulated and easily understood categories.
- c. Articulate the relationships between SSC's programs and services.
 - i. Articulate how programs and services enhance one another.
 - ii. Provide crossover value-adds between the programs and services.
 - iii. Identify our members' decision criteria for programs and services.
 - iv. Articulate the switching cost that members would encounter if they cease utilizing SSC.
- d. Develop concise and consistent descriptions for each SSC program.
- e. Define goals for communication and messaging within each program and service, and identify measurement tactics.



TACTICS & IMPLEMENTATION: PRICING

PRICING STRATEGY:

Southeast Service Cooperative is member-focused. Dedicated to sustainability and efficiency, our pricing strategy balances the value we provide our members with our operational expenses.

Our pricing strategy allows Southeast Service Cooperative to reinvest in our staff, programs, and services to continually improve.

PRICING TACTICS:

- 1. Consider and review modifications in pricing design, parameters, and/or approval process.**
- 2. Coordinate value-adds and deeper discounts than what members can arrange on their own with vendors.**
- 3. Determine optimum value for members and SSC.**
 - a. Experiment with pricing to determine optimal value.
 - b. Establish pricing in coordination with members' other pricing criterion.
 - c. Explore competitor impact and pricing.
- 4. Develop, evaluate, and enhance partnership incentives.**
 - a. Implement and adjust incentives for partners and vendors over time.
 - b. Identify and adjust switching costs both at the membership level and program and service level to enhance member retention and loyalty.
- 5. Review timing, structure, and presentation of value and pricing by program.**
 - a. Review current communications methods being used.
 - b. Ensure that value is highlighted over price.
 - c. Distribute at regular intervals in line with the purchasing horizon of the target market to aid with decision making.



TACTICS & IMPLEMENTATION: PLACEMENT

PLACEMENT STRATEGY:

Southeast Service Cooperative provides our members direct and responsive access to our expertise (whether in-person or through the use of technology) to foster meaningful relationships.

PLACEMENT TACTICS:

1. SSC Employees

- a. Develop internal branding guidelines for member interactions to ensure that all employees act as advocates of SSC first and our respective programs and services second.
- b. Understand relationships among SSC's full program and service offerings to maximize relationships, ask the right clarifying questions, share leads and referrals.

2. Website

- a. Review layout, navigation, and content to enhance customer experience.

3. Superintendent, Local Government, & Principal Advisory Committees

- a. Articulate internal goals for maximizing impact and value of committees.
- b. Evaluate the structure and agenda outline of committees.
- c. Measure effectiveness of committees.

4. Board of Directors

- a. Determine how to best leverage the relationships that our Board members have in their communities and other networks.

(continued)



TACTICS & IMPLEMENTATION:

PLACEMENT (continued)

5. Individuals Employed at Member Sites

- a. Identify our ideal contact person per program/service based on position.
- b. Understand that specific individual's needs.
- c. Develop a process for which communications are documented and tracked and for which feedback is collected, reviewed, and prioritized.

6. Member Agencies (at the Organizational Level)

- a. Deepen and strengthen our existing member relationships.
 - i. Build member profiles.
 - ii. Understand and communicate current usage of programs/services.
 - iii. Enhance how we communicate impact and value for our members.
 - v. Identify and anticipate member needs and add depth to our understanding of that member's needs and organizational structure.
 - iv. Create the conditions that motivate our members to maximize use of programs and services.
- b. Deepen our purpose for communication and familiarity with SSC.

6. Potential Members

- a. Identify and diversify opportunities to increase membership.
 - i. Articulate the value for different membership types and sizes.
 - ii. Determine how many prospective members are in our region who are not members.
 - iii. Determine and prioritize which prospective members to approach.
 - iv. Create new membership recruitment process.
 - Develop tactics to identify, communicate with, and recruit new members.
 - Develop process to identify the decision-makers and engage them in meaningful ways.
- b. Review and enhance current onboarding process for new members beyond initial membership to engagement and usage.



TACTICS & IMPLEMENTATION: PROMOTION

PROMOTION STRATEGY:

Our promotion strategy identifies and anticipates the unique and changing needs of our members. We are advocates for our members and provide timely, concise, and meaningful communication.

PROMOTION TACTICS:

2015-2016 Bold Step: Clarify, simplify, and individualize SSC messaging, speaking to unique member needs.

1. Evaluate organizational branding.

- a. Discuss current name and logo and how they resonate with members.
- b. Review visual brand and make sure that it is aligned with “why” and “who.”

2. Review and evaluate all current communication tools to ensure they are effectively supporting the brand (this list is not exhaustive).

- a. Connections Newsletter
- b. Annual Report
- c. Annual Plan
- d. New Member Packet
- e. Member Value Reports
- f. News You Can Use E-Blast
- g. Business Cards
- h. Contact Lists and CW Hats

3. Create and utilize simplified, targeted messaging.

- a. Clearly convey “who,” “what,” “why,” and the benefit. What is SSC? What do we do? Avoid the “fire hose approach” and tailor messaging to the needs and interests of our members.

4. Design collateral and materials to support and clearly convey the messaging.

- a. Make communication and collateral easily accessible internally and externally.
- b. Create a shared communication calendar and communication guidelines for content, consistency, and timing.
- c. Determine how to best distribute materials.
- d. Measure effectiveness of collateral, including a feedback loop.

