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INTRODUCTION
This toolkit has been developed by Trident United Way (TUW) for use by community partners in the Tri-County region (Berkeley, Charleston, and Dorchester counties) to offer steps and strategies for implementing a successful community engagement activity. Connecting with your community is an essential part of broadening support for your agency and if done well, community engagement efforts can advance your agency toward achieving real, long-lasting change. This toolkit also provides a brief overview of Trident United Way and an explanation of our investment strategy. Community engagement funding is available on a semi-annual basis (from 2016 to 2019) and TUW is interested in making investments that will help its partners embrace engagement best practices in the TUW areas of focus (Education, Health, Financial Stability and Strategic Volunteer Engagement).

ABOUT TRIDENT UNITED WAY
MISSION: Trident United Way is a catalyst for measurable community transformation through collective impact in education, financial stability, and health.

VISION: Our Tri-County region is extraordinary!

It is engaged, inclusive and thriving, and demands a high-quality educational system and economic conditions to eliminate the cycle of poverty, inspire graduation and foster lifelong good health.

All residents achieve their highest potential. Individuals, organizations and institutions are aligned and commit their human and financial resources to ensure this quality life.

TUW engages with the community in various, strategic ways to address the social issues facing our community:

Community Connector: We bring partners together to develop and deliver collaborative solutions for complex community problems.

Strategic Partner: We work with other organizations to make data-driven decisions and respond to our community’s most pressing needs.

Volunteer Engager: Volunteers are active in every level of Trident United Way as thought leaders, investment review council members, and they make a large impact through Day of Caring.

Funder: We invest in programs that deliver the kinds of real results that transform a community.
TUW INVESTMENT STRATEGY

Trident United Way (TUW) is committed to investing in initiatives that support systemic and community-level improvement in Education, Financial Stability, and Health within the Tri-County region (Berkeley, Charleston, and Dorchester counties). TUW currently has a diverse funding pool (see graph below) and more information can be found on www.tuw.org. The Community Engagement funding opportunity is explained in brief below, as it is the one that most closely aligns with this toolkit.

Trident United Way, as part of the 2016-2019 investment strategy, has investment opportunities focused specifically on community engagement activities for nonprofits in Berkeley, Charleston, and Dorchester counties. Through community engagement investments, TUW commits:

- To assist partners to embrace community engagement best practices in TUW areas of focus: education, financial stability, and health;
- To provide supplemental funding for engagement efforts and to create an investment entry point for organizations that may be new to TUW;
- To provide a community engagement toolkit and learning opportunity for organizations via a TUW information session

Successful community engagement activities enhance an organization’s community connections and, in turn, lead to increased capacity, strong partnerships, and improved systems. For more information regarding the community engagement investments visit www.tuw.org.
**WHAT IS COMMUNITY ENGAGEMENT?**

Community Engagement refers to the process an organization uses to engage and connect the community for the purpose of advancing their work or advancing toward a common goal.

Some examples of community engagement activities include episodic events (health fairs), workshops (financial education), episodic outreach, volunteer engagement (volunteer recruitment fair), and trainings (child abuse prevention advocate training).

Most commonly, community engagement activities fall into two forms: **community participation** or **connecting people to agencies**.

1. **Community Participation**

Activities in which community members are also participants often provide learning opportunities that affect/benefit them personally or equip them to provide direct services on behalf of your agency. Examples of the former include activities such as financial education workshops, debt consolidation training, or tax clinics. Examples of learning opportunities that equip members of the community to provide direct services or direct advocacy on your agency’s behalf may be something like CPR training or child abuse prevention advocate training.

When hosting community participation activities be sure to thoroughly think through the topic or materials being presented so that they are clear, engaging, and interactive. Think about activities that participants can do together as a group or in pairs to reinforce the information. These may include:

- Analyzing case studies
- Practicing with templates/dummies
- Role playing
- Reflection questions

An example of a community participation activity hosted by TUW is a poverty simulation. Read the following excerpt on how this learning opportunity engages community members to become advocates for financial stability services.
II. Connecting People to Agencies

Community engagement activities that disseminate information about agency services, including how to access them can be a really effective way of increasing your agency’s footprint. There are many ways to connect people to agencies, but perhaps the most common are community events. Here are just two examples:

**North Carolina Back 2 School Festival** is an annual event in Watauga County to help many low income, resident students prepare for the first day of school. Students receive free schools supplies, free haircuts, and free clothing giving them confidence to start the school year. The festival also offers free lunch to students and parents, games, and community resources for parents.

**West Virginia Breakfast with Superheroes** is a community event geared towards connecting low income families with state and local benefits and resources to assist their children. In order to get these families to come, a free breakfast is provided along with photo opportunities with popular superheroes and princesses. Parents are able to be screened for eligible benefits, such as TANF and SNAP, and browse booths of community agencies and resources all while their kids have fun.

Information should be available in a range of appropriate formats and must be accessible, easy to understand, and tailored to the audience. Here is a list of considerations when preparing information for these types of community engagement activities:

- Language (does your target audience speak a language other than English?)
- Messaging should be tailored to the target audience (clients vs. volunteers vs. donors)
- Prepare collateral about your agency to disburse to attendees/participants
- Spokespeople (volunteers and staff) should be prepared to talk about your mission

POVERTY SIMULATION

Trident United Way conducts poverty simulations where members of the community are invited to participate by role playing a person living in poverty. Participants navigate with their family around the room to work, school, utility companies, and human service agencies all the while facing obstacles such as costs for transportation, children acting out, layoffs, and evictions. After the simulation, the group reflects on their experience often mentioning frustrations with businesses being closed, long lines, and rude customer service agents. The simulation ends with a brief presentation sharing local statistics of the number of people without bank accounts, the number of people facing food insecurity, and the average living expenses in the Tri-County region. Here is one comment provided by a participant:

“The poverty simulation was very enlightening. It’s a great way to put yourself, as much as possible, in the shoes of a struggling person or family in our community. I found it difficult to survive and came away with a deeper appreciation for the many struggles folks in our community face, many of which I never think about.”
Regardless of the type of community engagement activity you decide to host, there are key elements necessary to make it a successful one. The rest of this toolkit will discuss each key element—planning, volunteer engagement, recording and measuring, and marketing and public relations. Additionally, resources and templates are included in the appendix to help you get started. Depending on the size and capacity of your agency, much of this information may be familiar to you. Should your agency have best practices or tips to share, please contact volunteer@tuw.org. As part of our continuous quality improvement efforts, TUW always strives to improve upon the work we do—including this toolkit!

**ACTIVITY PLANNING**

Taking time to plan out your activity— including tasks and timelines for volunteer engagement, recording and measuring, and marketing and public relations—will ensure you have a successful event. During the planning stages, there are four steps you will want to complete: set goals, utilize a checklist, plan your budget, and create a timeline.

1. **Goal Setting**

   What are the desired outcomes that you hope to achieve by hosting your community engagement activity? The following questions are a starting point that may prompt you to identify and refine your goals.

   - Why is this activity necessary?
   - Who do you hope to reach?
   - What do you hope to accomplish?

   Activity goals can be different depending on your work, how you are trying to grow, or the impact you want to make.

2. **5 W’s Checklist**

   **Utilize a checklist to determine the 5 W’s** of planning: who, what, where, when, and why. This checklist can be completed in conjunction with goal setting as the two planning activities can help inform each other. The checklist in Appendix A covers all five W’s and offers a wide range of considerations when planning a community engagement activity; therefore everything may not apply to every activity.

3. **Budgeting**

   Once you have determined your goals and decided on the 5 W’s, it is time to **plan out a budget**. An activity budget shows what monetary resources you have available to spend on the activity to select the best volunteer engagement, recording and measuring, and marketing and public relations efforts to fit your budget. You don’t want to go too far into activity implementation and realize there is not enough money in the budget to complete your plans. Having a budget ready in the beginning phase of your activity will enable you to track budget versus actual spent. An activity budget sample is provided in Appendix B along with a resource link for when you may need to write a budget narrative to submit with a budget request to a potential funder.
IV. Activity Timeline

Activity timelines keep work on track and allow you to see workloads and distribution of time for those working on the community engagement activity. Timelines can take several forms, most commonly in list/bulleted form or narrative form. Appendix C provides examples of both types of activity timelines. Regardless of the type of timeline chosen, a best practice when developing the timeline is to start from the date of the activity (or any internal deadline) and plan backwards. This will allow you to build in extra time for setbacks or obstacles as well as incorporating time for other deadlines that occur along the way. The following side note further explains padding for time and planning multiple deadlines.

Are you tech savvy? There are several free online project management tools that you may consider using to create an activity timeline. Here are some free online project management tools to research further:

- Asana
- Meister Task
- Producteev
- Freedcamp

Creating Activity Timelines

Agency A would like to have a banner created for their health fair on May 20th. The printer needs 10 business days to set up the design, get approval on a proof, and print. If Agency A would like to have the banner on hand by May 17th, the artwork needs to go to the printer on May 7th. It will take 3 weeks for the Agency A marketing department to create the artwork, get feedback, and make revisions for it to be ready by May 7th. Therefore, the Agency A Health Director should submit a request to Marketing to design a banner by April 15th to ensure enough time to meet each milestone.

Timeline:
April 15th – Submit marketing request to design banner
April 25th – Check with marketing on progress of banner
April 30th – Get approval for banner
May 7th – Submit banner design to printer
May 14th – Sign off on banner proof
May 17th – Receive banner from printer

The benefits of using online project management tools:

- Allow you to assign tasks to people in the organization and monitor their progress; minimizing the potential for micromanaging
- Allow you to record time spent on tasks; which will inform the planning process for next time the activity is offered
- Ensure you stay ahead of deadlines; preventing missed deadlines or quality of work to decline
**VOLUNTEER ENGAGEMENT**

Utilizing volunteers for community engagement activities are a great way to not only make new contacts or reengage existing contacts, but they also help build an agency’s capacity. It is strongly recommended to invest time and energy into recruiting and training volunteers because the return on the investment of time spent upfront will pay off in the long run. For community engagement activities, skill-based volunteers and episodic, group volunteers can best help to build an agency’s capacity to be successful.

**Skill-based volunteers**, with direction and supervision, can assist in areas such as planning, execution, recording data, and even training episodic group volunteers.

**Episodic group volunteers** can assist in areas such as set-up, clean-up, registration, or other areas where no experience and little supervision or instructions are needed.

Volunteers can become advocates and leaders in your organization; therefore, onboarding and training is very important to acclimating volunteers to your organization’s culture and work.

It is best practice to bring all your volunteers together for an orientation and training before the community engagement activity. Important topics to cover during this presentation are:

- Overview of your organization
- Goals of your community engagement activity
- Activity details (visuals such as maps or agendas are good reference tools for volunteers)
- Volunteer specific tasks
- Contact information for agency personnel

When working with volunteers, no matter their job, it is important to remember these 4 things:

1. **Thank them abundantly.** Volunteers are choosing to give their time to the agency, which deserves acknowledgement. A volunteer will remember whether they were thanked or not. See Appendix J for a sample volunteer thank you letter.

2. **Explain how their work impacts your activity and agency.** Volunteers need to know how their time and skills have contributed to the bigger picture. By taking the time to explain this to them, you increase the likelihood that they will continue to volunteer in even more important ways in the future.

3. **Ask for their feedback and report back on how it will be used.** Simply collecting feedback does not show volunteers that you care about what they have to say. Reporting back to them about how their feedback was utilized encourages volunteers to continue providing feedback because they know you are listening. It also helps your agency do CQI!

4. **Develop a plan to keep them involved in your work.** Does your agency have other volunteer opportunities they can plug into? One way to help you do this is through their feedback. Did they suggest improvements in planning and logistics; ask them to serve
on a planning committee earlier in the process. Did they suggest having more
volunteers; ask them to assist in a volunteer recruitment plan and help execute it. If you
have other activities coming up, ask if they would be interested in helping with those.

For additional information on building out your own volunteer program and networking around
volunteer management check out the South Carolina Association for Volunteer Administrators
(SCAVA) at www.scava.org.

RECORDING AND MEASURING OUTCOMES

I. Why is recording and measuring outcomes important?

So you have an activity planned and you know what your goals (i.e. expected outcomes) are. In
order to determine if you have been successful in meeting your goals, you will need to record
relevant data and use it to measure your success. Simply stating that your community
engagement activity was a success because you conducted the activity does not tell how it was
a success. If you record relevant data like participant numbers or survey responses, for
example, you will be able to explain how/if your activity was successful and determine whether
or not you realized your expected outcomes.

This section discusses how to measure activity outputs, outcomes and impact. It will also give
suggestions for the kind of data to measure and record. Please note: your community
engagement activity in and of itself is not an outcome! Rather, your community engagement
activity will generate outputs and outcomes based on what happens before, during and after the
activity. Both outputs and outcomes can be measured by what we call indicators.

Activity outputs are the direct deliverables of your activity and are things that you have complete
control over. Some examples of indicators that might measure program outputs are: # of
training sessions held, # of educational brochures produced, # of volunteer recruitment
sessions scheduled, etc.

On the other hand outcomes are based on the expected benefits of your activity. Outcomes are
things that you may have some control or direct influence over; however, they are, ultimately,
based on the actions of the participants. Some examples of indicators that might measure
outcomes are: # of participants who attended activity, # of volunteers recruited at the activity, #
of individuals who demonstrated increased knowledge on an assessment, # of individuals who
signed up for a future activity, etc.

Impact is by far the most difficult type of result to measure, particularly in the case of an
episodic activity; however, if you do plan to measure impact, it refers to the long term change
expected by your program. Programs have much less control or influence over activity impact
than they do over activity outputs and outcomes. This is due to the fact that a number of
factors, besides activity participation, are typically present when assessing impact. Impact is
not typically measured with indicators, as outputs and outcomes are, but is assessed through a formal evaluation.

You can see the difference between outputs, outcomes and impact in the graphic below.

Example:

Once you have collected the data to support your outcomes, you can conduct a continuous quality improvement process. Continuous quality improvement (CQI) is a process by which you improve upon current systems and strategies based on what your data tells you. Using the example in the graphic above, how might you now increase or expand upon your goal?
• Next year’s goal could be to have 100 participants attend training
• As part of your CQI, you may want to increase your event advertising to achieve that increase in participants

II. Setting Targets & Results Based Accountability
An important part of measuring outputs and outcomes and using those outcomes for CQI is the process of setting targets. Targets are goals you set for your output and outcome indicators. Depending on the length of your activity, regularly monitoring of your indicators and your progress toward goals will help you stay on track and/or let you know if you need to make adjustments to those goals. Factors to consider when setting or adjusting targets include:

• Activity resources
• Starting point or baseline
• Previous activity performance, if available
  o Be realistic with expected increases
  o Targets should only increase if there is a reason to expect an increase (e.g. additional funding, improved system, etc.)
• Timeframe
• Performance of other similar activities
• Environmental factors (weather, time of day, etc.),

Trident United Way has adopted a framework for measuring results and setting targets known as the Results Based Accountability (RBA) framework. RBA was developed by Clear Impact, an organization that provides support to nonprofits and governmental entities seeking to improve their performance management. The RBA framework focused on three questions:

1. How much did we do? (usually outputs and immediate outcomes)
2. How well did we do it? (usually immediate and intermediate outcomes)
3. Is anyone better off? (intermediate outcomes)

The graphic below depicts how these three questions relate to effort, effect, quantity and quality, as well as depicting the levels of influence and control programs have over these questions.
III. Quantitative vs. Qualitative Data

There are two types of data that are important to collect when measuring community engagement activity goals: quantitative and qualitative data.

Quantitative data can be counted and measured easily. The number of participants who attended an activity or the number of people who had their blood pressure checked at an activity are examples of quantitative data.

Qualitative data is softer, richer data that often provides meaning to the numbers. It is more descriptive and often cannot be reduced to a number. It can be captured through surveys and interviews in the form of written and verbal feedback.

Here is an example that illustrates the difference between the two:
- 25 prospective volunteers attended an orientation session (quantitative)
- 22 of them signed up for the next phase of onboarding: training (quantitative)
- In a follow-up survey, volunteers were asked to provide feedback on the orientation session in a comment box. The following comments were provided:
  - “The orientation really taught me how important volunteers are to fulfilling the mission. I can’t wait to learn exactly what I’ll be doing at training.” (qualitative)
- “I really enjoyed taking a tour of the building and seeing everyone in action!” (qualitative)
- “The information in the power point was too much to absorb all at once but the videos where the program managers explained their roles was helpful.” (qualitative)

**IV. What to record and how to measure**

What to record and how to measure will differ depending on what the community engagement activity is; one size does not fit all. Below is a chart of some ideas on what to record and how to collect it.

<table>
<thead>
<tr>
<th>What to Record</th>
<th>How to Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>• # of participants/attendees at funded activity</td>
<td>• Registration forms</td>
</tr>
<tr>
<td>• # of individuals reached as a result of outreach efforts for this activity</td>
<td>• Sign in sheets</td>
</tr>
<tr>
<td>• # of individuals who received Education, Financial Stability, or Health</td>
<td>• In-person surveys (see Appendix D for an example)</td>
</tr>
<tr>
<td>services at funded activity</td>
<td>• Online Surveys (see Appendix E for an example)</td>
</tr>
<tr>
<td>• # of volunteers recruited</td>
<td>• Utilize spreadsheets (see Appendix F for an example)</td>
</tr>
<tr>
<td>• # of volunteer hours</td>
<td></td>
</tr>
<tr>
<td>• Media and Public Relations efforts undertaken</td>
<td><strong>Free Tools Available for Recording and Measuring</strong></td>
</tr>
<tr>
<td>• # of earned media mentions</td>
<td>Survey Monkey</td>
</tr>
<tr>
<td>• # of new social media followers/likes</td>
<td>Google Forms/Sheets</td>
</tr>
<tr>
<td>• If there are other items that better measure your activity’s success you</td>
<td>CharityTracker</td>
</tr>
<tr>
<td>can create your own:</td>
<td>Poll Everywhere</td>
</tr>
<tr>
<td>• ______________________</td>
<td>Free volunteer management software</td>
</tr>
<tr>
<td>• ______________________</td>
<td>available online</td>
</tr>
</tbody>
</table>

Sometimes, recording the # of participants/attendees is not enough data to get a rich picture of the activity. You may also want to go beyond the basic information and collect demographics (sex, race, age, etc.) as well. If so, we recommend using intake forms and/or a spreadsheet or database to capture that information when possible.

Using the healthy eating workshop example from earlier, a simple way for Agency X to record the necessary data to measure their outputs and outcomes is with a client tracking
spreadsheet. Appendix F shows a sample client tracking spreadsheet using the healthy eating workshop example above.

Just as there are free tools for creating activity timelines, there are free online tools available to help record and measure relevant data about community engagement activities.

Survey Monkey is a free online survey tool that allows users to build surveys from templates provided or from scratch utilizing their question bank. Users can then email the survey to respondents from their site or copy and paste the link in their own communication. Survey Monkey also generates detailed reports of responses that are available to download in Excel, PDF, or other document types at no cost.

Google allows Gmail users to create spreadsheets and forms at no cost. Google sheets are the equivalent of Microsoft Excel and easy to use. Google forms can create registration forms or surveys for people to fill out; form responses are then captured in Google sheets.

CharityTracker is a database resource that TUW offers to the community at no cost. CharityTracker allows you to track services that your clients receive, client demographics, and client goals and outcomes. You can also view services clients receive at other organizations using CharityTracker, so you can better coordinate referrals. Organizations using CharityTracker can pull a number of reports which can provide valuable information about trends in services provided and client outcomes. For more information on how to sign up for CharityTracker contact Cathy Easley at ceasley@tuw.org.

Once you have recorded and measured your quantitative and qualitative data, be sure to include summaries of both in an activity report. Typically, an activity report should include a brief summary description of your activity and details about the activity – what, when, where, who – and it should tell how data was collected.

Appendix G is an example of an activity report executive summary with a description, quantitative data highlights, qualitative data highlights, and suggestions for improvement.

MARKETING & PUBLIC RELATIONS
It is important to build marketing and public relations efforts into your activity timeline because marketing efforts ensure that the community will find out about your activity. There are many ways to promote your activity, and this is an area where creativity is required. Not every community engagement activity is the same and therefore you should develop a marketing and public relations plan that will work for your agency, your budget, and your activity.

I. Messaging Considerations
Before you open your creativity box, there are some important tips to consider when planning your messaging:

- **Target marketing materials for your audience.** Determine where your audience finds their information, what is likely to draw their attention and what you want them to
remember—or one key takeaway from the material. Simply sending out information into the community without any focus or targeted message does not guarantee you will reach your intended audience with the intended message to garner the results you are seeking.

- **Messaging occurs before, during, and after your activity.**
  BEFORE: Marketing goals should not be limited to achieving high attendance numbers at your activity. Your pre-event communications should build awareness and clearly communicate the purpose and benefits your audience/attendees will receive.

  DURING: Let your community know about the event as it is taking place. During the event or activity take pictures and capture quotes or stories to share via social media. Gathering this content can help you create your BEFORE communications if your event is episodic or re-occurs in the future.

  AFTER: After your activity, thank your attendees and share the impact your agency and the event made in the community.

- **Prepare staff and volunteers on how to handle media concerns the day of your activity.**
  This work should be done in advance of your activity and clearly explain which staff or volunteers are able to speak to the media. Provide key talking points so your message is consistent. Make sure staff and volunteers know who to contact in the event of an incident that might get media coverage.

### II. Common Strategies and Tactics

After you have developed your messaging, select which marketing strategies and tactics your agency has the capacity to take on and implement well. One factor that may influence your selections is your budget. While some marketing efforts can be done at no or low cost, others can have large price tags attached to them.

Below is a chart of common marketing and public relations tactics to consider for community engagement activities. This list is not exhaustive but will serve as a guide when deciding on how you will promote your activity.

<table>
<thead>
<tr>
<th>Online (low or no cost)</th>
<th>Print Collateral (can print in-house or out-source for large quantities)</th>
<th>Mass Media (costs dependent on choices and frequency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Flyer</td>
<td>Press Release (no cost to email to media)</td>
</tr>
<tr>
<td>Community Calendars (check local newspaper and city/town websites)</td>
<td>Brochure</td>
<td>Radio</td>
</tr>
<tr>
<td>Social Media</td>
<td>Postcard</td>
<td>Newspaper</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Constant Contact</td>
</tr>
</tbody>
</table>
Appendix H includes a list of more resources and tools that can be utilized for your marketing and public relations efforts along with other important resources for your agency. Additionally, Appendix I provides a template for writing a press release.

III. Recording marketing efforts

Recording where you invested time and energy into marketing and public relations will help you identify which ones were worth the effort. Google Alerts are a free tool that allows you to identify key words about your activity. Every time Google picks up the keywords in media coverage an alert is sent to your inbox.

For example, if you were hosting a summer STEM awareness event, your key words could be:

<table>
<thead>
<tr>
<th>Your activity name</th>
<th>Your agency name</th>
<th>Lowcountry STEM</th>
<th>The activity location</th>
</tr>
</thead>
</table>

An easy way to record marketing and public relations efforts is to keep track on a spreadsheet. If your activity information was listed on a Town's website or language from your press release shows up in a local newspaper, you could record the name of the media source, the location (web link), tone or sentiment, and the date it was published. When members of media call to inquire about your activity, ask them how they heard about it and track it back to a tactic you used. If you decide to conduct a survey, include a question asking people how they heard about your activity. It may be important to evaluate messaging with attendees after the event and their likelihood to attend again or recommend to others. The more data you can capture on how people found out about the activity, the more informed you will be about which marketing efforts were most effective. This information will feed your Continuous Quality Improvement efforts!
APPENDICES

Appendix A – 5 W’s Checklist for Planning

Who
- Who are you benefiting?
- Who would you like to attend?
- Who else needs to be there?
  - Other agencies?
  - Vendors?
  - Board members?
- How many volunteers are needed?
  - What kinds of volunteers are needed?

What
- What is the impact your activity will have on the community?
- What will the attendees be doing?
- Do you need to provide food and drink?
- What kind of information needs to be provided?
  - Maps?
  - Brochures?
- What kind of marketing will attract people to the event?

Where
- What venue/facility will the activity take place?
- Where will attendees park?
- Where are the restrooms?
- Where will vendors or exhibitors park?
- Where will vendors or exhibitors set-up?
- Where will volunteers park?
- Where will volunteer check in?

When
- Have you checked community calendars for competing activities/events?
- Have you checked area school calendars?
- Is this a recurring or one time activity?
- When will set-up take place?
- When will volunteers arrive?
- When will attendees arrive?
- When will clean-up take place?

Why
- Why are you hosting the activity/event?
- Why should people come to your activity?
- Why should volunteers sign up to help?
## Appendix B – Activity Sample Budget

**XYZ Community Fair**

Instructions: Put your funding requests in column B only

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>Estimated</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Site Fees</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room rental</td>
<td>$1,000</td>
<td></td>
</tr>
<tr>
<td>Tables and Chairs</td>
<td>$ 100</td>
<td></td>
</tr>
<tr>
<td>Site Staff</td>
<td>$300</td>
<td></td>
</tr>
<tr>
<td><strong>Total Category A Expense</strong></td>
<td>$1,400</td>
<td>$</td>
</tr>
<tr>
<td><strong>Refreshments</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>$500</td>
<td></td>
</tr>
<tr>
<td>Drinks</td>
<td>$ 75</td>
<td></td>
</tr>
<tr>
<td><strong>Total Category B Expense</strong></td>
<td>$575</td>
<td>$</td>
</tr>
<tr>
<td><strong>Publicity</strong></td>
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<tr>
<td>Graphics Work</td>
<td>$ 400</td>
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</tr>
<tr>
<td>Printing/Photocopying</td>
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<td>$</td>
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<td><strong>Supplies</strong></td>
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<tr>
<td>Balloons</td>
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<tr>
<td>Prizes</td>
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<td><strong>Entertainment</strong></td>
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<td>Emcee</td>
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<td>DJ</td>
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</table>

**Budget Notes**
Please use the space below for budget notes

Resource for writing a budget narrative - [http://grant-central-station.com/articles/33/](http://grant-central-station.com/articles/33/)
Appendix C - Activity Timeline Examples

Bulleted Timeline for an Event:

- April/May – Announce Day of Caring 2016 Date
  - Update website
  - Post on community calendars
- May-July – Pre-planning activities to include registration system set-up, internal calendar published, marketing message approved
  - Film Day of Caring Chair’s recruitment video
- August – Host Agency/School Information Sessions
  - Open project registration
  - Begin running Day of Caring Chair’s recruitment video on website & social media
- September – Host Company Team Information Sessions
  - Open team registration
  - Run digital billboards
  - Schedule TV and radio interviews
- October – Host pre-event gathering
  - Conduct internal staff prep meeting
- November – Day of Caring 2016
  - Oost photos on social media
  - Announce contest winners
  - Film and publish Thank You video
- November/December – Conduct online survey evaluations
  - Analyze survey results

Narrated Timeline for a Focus Group:

Once funding has been received, we will schedule the focus group dates with the facilitator to take place at the beginning of October. We will then work with the facilitator to develop questions along with a participant list of identified individuals and targeted audiences. Once we have secured the dates and locations for the focus groups we will print the invitations.

Invitations will be sent out mid-August to give people 4-6 weeks to schedule it on their calendar. We will follow up with those who have not responded to the invitation in mid-September to meet our participant goal.

The focus groups will take place at the beginning of October. We will have a summary of findings from the facilitator by November 10, 2016. Once we review the findings, the Strategic Planning Committee will develop a tactical plan to be approved by the Board of Directors for implementation January 1, 2017. Therefore our final report to TUW will be sent in December 2016.
Appendix D: In-person survey Example

Please complete this survey to let us know how you feel about the workshop you just attended.

(DIRECTIONS: Just circle the number that best describes how you feel.)

1. This workshop met my expectations based on information shared.

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

2. I had enough time to plan to attend this workshop.

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

3. I need more information on one or more topics covered.

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

What topic(s), please specify:

(Optional)

Name: ________________________________

Organization: __________________________

Email address: __________________________  Thanks !!!
Appendix E: Online Survey Example Questions

While this survey is provided in a document format, a free easy-to-use online survey tool is Survey Monkey.

**PART I: Please provide the following information about your Health Fair:**

1. **How did you find out about the Health Fair?**
   a. 2014 Participant
   b. Agency Name’s Website
   c. Social Media
   d. Billboard
   e. Other (please specify): ______________________

2. **Are you interested in attending next year’s Health Fair?**
   - Yes ___
   - No ___
   - Don’t Know ___
   
   Comment:

**PART II: Please rate your overall experience with this event:**

*(DIRECTIONS: Please circle the number that best describes how you feel.)*

3. **My personal experience with the Health Fair met my expectations.**

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

4. **I/we were supported well by Agency Name, (i.e. Information was presented clearly, emails/phone calls were responded promptly, questions/issues were resolved quickly, etc.).**

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

5. **The Health Fair registration process was straightforward and very easy to use.**
6. I found out about a lot of agencies and services in the community I didn’t know about already.

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

7. I enjoyed receiving the welcome bag with free samples.

<table>
<thead>
<tr>
<th>Strongly-Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly-Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**PART III: Please give us your suggestions for improving Health Fair next year.**

We encourage you to provide comments, suggestions and constructive criticism for making the Health Fair more effective and a more positive experience for everyone (e.g. agencies/organizations, sponsoring companies/organizations, and for all the volunteers).

**PART IV: Please take one more moment to update your contact information.**

Name
______________________________

Position/Title
______________________________

Company/Org.
______________________________

Email: __________________________

Phone: __________________________
<table>
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<tr>
<th>Participant Name</th>
<th>Email</th>
<th>Phone</th>
<th>Attended Workshop 1</th>
<th>Attended Workshop 2</th>
<th>Attended Workshop 3</th>
<th>Total # of Appts</th>
<th>PreTest Score</th>
<th>Post Test Score</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nelly Sylvester</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
<td>(843)-555-555</td>
<td>1</td>
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<td>2</td>
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<td>Rolande Currey</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
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<td>Margarete Dilday</td>
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<td>Shonda Betty</td>
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<td>Shameka Emmert</td>
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<td>Venice Rossil</td>
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</tr>
<tr>
<td>Gena Mallard</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
<td>(843)-555-561</td>
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<tr>
<td>Katrice Kulpa</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
<td>(843)-555-562</td>
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<tr>
<td>Maria a Brakebill</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
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<tr>
<td>Dana Thacker</td>
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<td>Laquanda Traver</td>
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<td>Susanna Soosebee</td>
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<td>Lesli Lile</td>
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<td>Arissa Rowsey</td>
<td><a href="mailto:emailaddress@email.com">emailaddress@email.com</a></td>
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<tr>
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<td>Brandon Adkison</td>
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<tr>
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</table>

<table>
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</tbody>
</table>

Using numbers in your client tracking spreadsheets allows you to use the SUM formula to automatically calculate totals for rows or columns.
Appendix G: Activity Report Executive Summary

On Saturday, February 5, 2015, Agency ABC held a half-day financial education workshop for graduating college students at the University of Florida student life center. There were 300 students who attended 4 classes on paying back student loans, car buying, retirement plans, and saving for emergencies. Students were required to pre-register online using a Google Form in order to attend. At the end of the last class, students were handed a paper survey to complete before they left. Out of 300 student participants, we received 240 responses. Below is a summary of the survey responses:

- 220/240 participants felt their experience attending the workshop exceeded their expectations
- 200/240 felt they were more prepared for post-graduation after attending the workshop
- 229/240 circled paying back student loan class as their most valuable class offered

Additionally, participants provided enriching comments in their surveys:

“The workshop was really well organized, I knew where I was going for each class and each one provided easy to understand information about their topic. I wish there was a class on budgeting because even though I theoretically know how to do this, these classes showed me I have a lot more to include in my “adult” budget.”

“I liked the student loan and retirement plan classes but the other two weren’t necessary, I already knew all the information the presenter talked about.”

Financial Education Workshop Metrics:

- 300 graduating college students attended
- 300 graduating college students received information on paying student loans, car buying, retirement plans, and saving for emergencies
- 4 earned media mentions
  - 1 in local newspaper
  - 1 on local news channel
  - 2 area news websites posted our press release
- 115 new facebook likes on our page occurred on Feb. 5th

Suggestions for CQI:

- During registration, ask participants to select the classes they would like to attend instead of requiring them to attend all classes
- Move the location of the student loan class or add a second class; we maxed out the room capacity for the class
Appendix H: Resource List

Volunteer Recruitment and Management

Volunteer Management Resources
- Energize Inc. - https://www.energizeinc.com/
- Volunteer Match Learning Center - http://learn.volunteermatch.org/

Marketing and Public Relations

Email Marketing
- MailChimp – www.mailchimp.com
- Constant Contact – www.constantcontact.com

Social Media Management (schedule content for all your social media sites and gather metrics through one tool)
- Hootsuite – www.hootsuite.com
- Sproutsocial – www.sproutsocial.com

Website Builder
- Wix – www.wix.com

Free Resources for Additional Information

- Content Marketing for Non-Profits by Kivi Leroux Miller
- Kivi’s website www.nonprofitmarketingguide.com
  - webinars, free ebooks and helpful newsletters
- Charleston American Marketing Association www.charlestonama.org
  - Annual Marketing Bootcamp – takes place in September 15, 2017 (approx. $75)
  - Nonprofit Marketing Coffee Talk- 6-8 times per year (free if member or $10)
- The Modern Connection Blog – www.themodernconnection.com/our-blog
  - Social Media Tips
- SCIWAY – www.sciway.net/news
  - Can filter information to extract local media sources i.e. newspapers, radio, tv, magazines
- Together SC (rebranded from SCANPO)– www.togethersc.org
  - Information on Non-Profit Management
- Corporation for National & Community Service -https://www.volunteeringinamerica.gov/
  - National, State, City volunteer statistics
- TechSoup – www.techsoup.org
  - Obtain software and computer programs at discounted costs
- https://www.polleverywhere.com/app - to conduct polling during presentations
- http://www.simpleapps.eu/simplemind/ - offers 30 day free trial (for mind mapping and/or process mapping)
• [https://www.wufoo.com/features/](https://www.wufoo.com/features/) - to create online forms / an alternative to Google forms
• [www.canva.com](http://www.canva.com) - create compelling graphics and layouts for common marketing tools
  o Newsletters, flyers, e-mail banners
• National Council of Nonprofits, Budgeting for Nonprofits – [https://www.councilofnonprofits.org/tools-resources/budgeting-nonprofits](https://www.councilofnonprofits.org/tools-resources/budgeting-nonprofits)
• Board Source - [https://boardsource.org/resources-solutions/](https://boardsource.org/resources-solutions/)
• Independent Sector - [https://www.independentsector.org/resources/](https://www.independentsector.org/resources/)
Appendix I: Press Release Template

Your Agency Name
[Agency Address]
[Agency Address 2]
[Agency City], [Agency State] [Agency Zip Code]
[Agency Phone Number]
[Agency Website Address]

[Agency Contact Name]
[Contact Number]
[Contact Email]

FOR IMMEDIATE RELEASE

TYPE HEADLINE HERE

Type Sub-headline here

City, State (Date) – In the first 3-4 sentences, state the most important information you want people to know about your community engagement activity. Be specific when talking about what, when, where, and who.

In the next paragraph, mention any other details that are interesting about your activity e.g. any partnerships to put on the activity, what people can expect when they arrive, free giveaways or prizes.

The third paragraph should be a quote from the agency’s executive director or leadership about why people should attend and what impact it will make on attendees or the community.

In the last paragraph, tell people how they can find out more information about your activity or where they can go to register.

About [Your Agency Name]

In this small space, provide 2-3 sentences on your agency’s mission and programs. You can include things like the year the agency was founded, number of people served, and service area.
April 2, 2016

Mr. Amazing Volunteer  
123 Imaginary Lane  
Somewhere City, SC 98765

Dear Mr. Volunteer,

On behalf of XYZ Agency I would like to thank you for your generous gift of time and expertise last week. Our community fair was a complete success with over 500 attendees—many of whom signed up to learn more about our services. Volunteers like you who bring invaluable skills to the table are what help us create meaningful community events. Your experience with event planning was such a benefit to our organization.

Our staff and volunteers sincerely appreciated your input and enjoyed working side by side with you. I hope you will join us at our upcoming community celebration in the fall, where we will spend time recognizing the contributions of our staff, key stakeholders, and amazing volunteers like you. Please look for an invitation coming soon in the mail.

Skilled volunteers like you are a critical part of a nonprofit’s success. They help build capacity by bringing skills to the table that may not already be there. They help improve organizational systems by offering expertise and feedback. Once again, thank you, and I look forward to future volunteer projects!

Sincerely,

Holly Human services  
Executive Director, Agency XYZ