

# COMMUNITY TOOLKIT TABLE OF CONTENTS

1. **REVIEWING YOUR OPERATIONS:** Part of running a successful organization is understanding and implementing an operational plan. The operational plan includes an effective mission statement, a strategic plan and a budget. It also includes methods to work with your board of directors as well as plans to train and support your staff and volunteer base. This section of the toolkit will help you to develop an effective operational plan for your organization.

## **A. Optimize Your Organizational Development**

1. Review your Mission Statement
2. Create a Strategic Plan
3. Follow Internal Revenue Services (IRS) Timelines
4. Plan your Organizational Budget
5. Worksheet, Sample, Template
  - a. Mission Statement Worksheet
  - b. Organizational Budget Template
  - c. Accrued and Cash Basis Revenue Explanations
6. Resources

## **B. Maximize Your Board of Directors, Staff, Constituents and Volunteers**

1. Engage your Board of Directors
2. Manage your Constituents
3. Support and Train your Staff and Volunteers
4. Sample
  - a. Volunteer Newsletter Sample
5. Resources

2. **PLANNING AND EVALUATING EFFECTIVE PROGRAMS:** Program planning and evaluation are critical and necessary steps not only to a successful program but a successful organization. Understanding the steps involved in reviewing the needs of your community as well as how to develop an evaluation plan to guide your program development will be discussed in this section.

## **A. Planning Steps**

1. Conduct a Needs Assessment
2. Establish an Evidence Base
3. Template

- a. Needs Assessment Template

- 4. Resources

**B. Develop Your Evaluation Plan**

- 1. Complete your Evaluation Plan
- 2. Assess Barriers and Challenges
- 3. Understand Metrics
- 4. Develop a Logic Model
- 5. Worksheets, Samples, Templates
  - a. Evaluation Plan Template
  - b. Evaluation Definitions
  - c. Project Budget Template
  - d. Sample Metrics Worksheet
  - e. Survey Tips
  - f. Frequently Used Survey Questions
  - g. Logic Model Template

- 6. Resources

**C. Conduct Formative Research**

- 1. Conduct Interviews
- 2. Hold a Focus Group
- 3. Pilot Test your Initiative
- 4. Resources

**D. Manage Your Data**

3. UNDERSTANDING GRANTS: In this section you will learn more about the grants management process as well as the questions to ask yourself when choosing grants. You will also to learn how to work effectively with your funding sources once you have a grant, including how to establish and maintain a positive, ongoing relationship with grantors.

**A. Locate Potential Grantors**

- 1. Resources

**B. Create Grants that Will Get Funded**

- 1. Determine Fit With your Program
- 2. Set your Timelines
- 3. Follow Guidelines
- 4. Prepare for a Response

5. Samples
  - a. Letter of Intent Samples
6. Resources

**C. Manage Your Grants Successfully**

1. Establish Open Lines of Communication
2. Learn about Policies and Procedures
3. Adhere to Reporting Requirements
4. Be a Responsible Steward of Funds
5. Resources

4. **FUNDRAISING SUCCESSFULLY:** Fundraising and development can occur through many different channels. This could include your website, direct mailings, grant writing, major and planned giving as well as direct sales. This section focuses largely on event planning but also covers other common forms of fundraising.

**A. Planning Your Events**

1. Decide What Type of Event to Hold
2. Find Resources to Support your Event
3. Gain Community Support
4. Make it Easy for People to Donate
5. Resources

**B. Consider Pledge Drives and Direct Mail Campaigns**

1. Pledge forms
2. Self Addressed Envelopes
3. Direct Mail Campaigns

**C. Thank Your Donors**

5. **MARKETING, COMMUNICATIONS AND PUBLIC RELATIONS:** Marketing, communications and public relations (PR) are crucial to the mission, goals and successes of your organization. These efforts can help spread the word about your programs and events. They can also be proactive in identifying the needs of your constituents. In this section you will find advice about public relations, sharing your story and how to develop supportive materials. The use of technology and creating effective branding will also be discussed.

**A. Promote Yourself**

1. Share your Story

2. Find Ways to Promote your Materials
3. Develop Collateral
4. Worksheet
  - a. How to Pitch Stories to the Media
5. Resources

**B. Maximize your Reach**

1. Use Technology
2. Understand Media Outreach and Public Relations
3. Develop a Strong Brand
4. Worksheets, Samples
  - a. Types of Media and What Makes Them Different
  - b. Tips for Talking to the Media
  - c. Press Release Sample

**5. Resources**

6. CONDUCTING COMMUNITY OUTREACH: Community outreach involves the strategies that you employ to educate people about your organization and the services you offer and the ways that you can engage your community to seek out their needs. In this section, you will learn about strategies to reach out to underserved communities as well as how you can best promote your resources and work collaboratively with other organizations and partnerships.

**A. Understand your Community**

1. Reach Out to the Underserved
2. Gather Information
3. Engage your Community
4. Resources

**B. Build Partnerships**

1. Identify Other Organizations
2. Resources

**C. Be Strategic and Facilitate Public Engagement**

7. UTILIZING ADVOCACY SKILLS: Advocacy can occur at the grassroots level, in local communities and towns as well as on larger scale levels, such as lobbying on Capitol Hill. All of these methods can affect your organization, the constituents you serve and the mission that governs your direction.

In this section you will learn how grassroots advocacy can help your organization make an impact on issues that are important to your mission.

**A. What is Grassroots Advocacy?**

1. Resources

**B. Understanding and Influencing Policies**

1. Considerations for Public Policy
2. Understand How Policy Decisions are Made
3. Worksheet
  - a. Characteristics of Persuasion Worksheet
4. Resources

8. DEVELOPING A SUSTAINABILITY PLAN: Sustainability results from the culmination of your efforts across all of the areas discussed in this toolkit. Sustainability measures can vary based on the organization, your program, what you are measuring and how you define success. Sustainability should reflect oversight of both long-term goals and day-to-day operations. In this section, you will learn more about the time, planning and energy required to sustain an organization or program.

**A. Sustainability Plan Tools**

1. How is Sustainability Different from Evaluation?
2. Sustainability within the Community
3. Development and Understanding of Policies
4. Measuring Sustainability
5. Resources

9. ADDITIONAL INFORMATION

**A. Legal Resources**

**B. About the Community Toolkit Development Process**

**C. About the Lance Armstrong Foundation**