

# CUTTING EDGE RELIEF, INC.

FINAL REPORT  
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DISASTER RELIEF LONGEVITY TEAM

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## Table of Terms

Term	Definition
IU	Indiana University
O’Neill SPEA	O’Neill School of Public and Environmental Affairs
SWOT Analysis	Strengths Weaknesses Opportunities and Threats Analysis
CER	Cutting Edge Relief
NGO	Non-Governmental Organization
FBO	Faith Based Organization
Stakeholders	The individuals who are involved with or affected by an organization
Strategic Plan	A plan developed by an organization to determine goals, direction, and resource allocation
CPR/BLS Training	Cardiopulmonary Resuscitation/Basic Life Support Training
Social Media Calendar	Spreadsheet or calendar used to organize social media posts and streams
Social Media Strategy	A summary of outreach goals and strategies an organization plans to reach through social media
CBA	Cost-Benefit Analysis

## Executive Summary

A group of O'Neill School of Public and Environmental Affairs students conducted research and interviews to compile this report for Cutting Edge Relief. This report addresses the following questions with a set of recommendations: (1) How can CER increase its footprint for greater awareness and legitimacy?; (2) How can CER develop a larger pool of volunteers?; and (3) As a start-up, are the services offered too diverse?

In order to address these three questions we went through a process of research, analysis, and application. We used a qualitative approach based on information found in literature on non-profit organizations, faith-based organizations, and project management. From our literature review, interviews, and other research we compiled recommendations for each guiding question.

To address the question of how CER can increase its legitimacy and raise awareness of its work and mission, we aimed to identify the challenges and successful practices of spin-off operations. We recommend that CER create a clear and focused mission statement by answering the following questions: what does CER do; how do they do it; and why do they do it?. To further increase legitimacy, CER should sharpen and clarify its budget and fundraising efforts insofar that donors can differentiate the spin-off operation(s) from the parent organization. CER should consult our general recommendations on grant management. Further, we advise that CER develop a standardized, operating budget to outline how financial resources are to be used during the fiscal year(s) and to account for all fiscal activities in a cohesive way. A line item format would assist CER in its budgeting presentation.

CER can increase its legitimacy and footprint through identifying itself clearly on social media and through developing a social media strategy. We provide several recommendations regarding creating a social media presence, strategy, and calendar. This includes CER expanding to Instagram and LinkedIn.

We recommend that CER increase its reach by clearly setting goals and creating a strategic plan; the report contains a strategic plan template to help guide CER in this process. Finally, to address the first guiding question, we advise that CER prioritize local partnerships and follow a set of best practices for partnership development and maintenance.

To answer the second guiding question of how CER can develop a larger pool of volunteers, we aimed to characterize and comprehend disaster relief, including recovery, and experiencing fatigue as an opportunity to partner with local, regional, and/or national service sponsorship partners. We advise that CER expand its volunteer base and conduct formal disaster and fatigue training for volunteers. We also advise that CER build detailed and engaging orientations and guidelines for volunteers. It would also benefit CER to solicit volunteer feedback after projects.

Developing a recruitment plan would help CER expand its volunteer base. We include a recruitment plan template that encourages CER to reflect on why volunteers are important for CER, why people choose to volunteer, what types of volunteers CER needs, and to develop promotional materials, among other suggestions.

In order to determine if CER offers services that are too diverse, we recommend that CER develop a model for resource allocation and create a process for prioritizing projects. We recommend that CER conduct a Cost Benefit Analysis of all of its programs to determine whether it is spreading itself too thin.

### **Acknowledgements**

We would like to express our great appreciation to Bill Richardson for his time and valuable insight; Dr. Bell for his patient guidance and enthusiastic encouragement throughout the project. Lastly, we are grateful to all of our Capstone Group members with whom we have the pleasure to work alongside on this report and related materials.

## **Introduction**

Cutting Edge Relief (CER) is a faith-based nonprofit organization located in Pittsburg, Pennsylvania that provides aid to those living on the edge. Although CER is based in Western Pennsylvania, they provide services and disaster relief locally, throughout the United States and South Asia. CER provides a wide range of services, from local educational programs to microeconomic programs in Nepal and more. In recent years, much of the organization's international aid efforts have been directed towards the Chepang people of Nepal.

CER was recently established as a 501(c)(3). They operate with a small staff, the founder Bill Richardson and his wife, a seven-member board of directors, and numerous volunteers who support its activities. CER is seeking to increase its organizational capacity, legitimacy, and volunteer base.

This report will address the following questions posed by CER and provide them with a set of recommendations: (1) How can CER increase its footprint for greater awareness and legitimacy?, (2) How can CER develop a larger pool of volunteers?, and (3) As a start-up, are the services we offer too diverse? Are we doing too much?

This report aims to provide CER with a set of recommendations and strategies for strengthening organizational identity, expanding and maintaining volunteers, managing and allocating resources, developing a budget, and social media management.

## Recommendations

**Guiding Question: How can CER increase its footprint for greater awareness and legitimacy?**

**Goal: Identify the challenges and successful practices of spin-off operations, where an initiative of an agency is separated into its own entity.**

### **Recommendation: Create a clear and focused mission statement**<sup>1</sup>

In order to improve legitimacy, an organization must develop a strong identity. CER is currently operating without a mission statement, which is considered a key component of developing a strong organization identity. The mission statement should be clear, concise, and declare CER's values. It can also be thought of as a way to describe why CER was founded and why it's worth investing in. When developing a mission statement one should be specific and answer the questions: what do we do, how do we do it, and why?

For example, CER could answer these questions in the following ways:

- What do we do?
  - CER provides relief to those on the edge
- How do we do it?
  - By rebuilding communities and providing resources to those in need
- Why do we do it?
  - To improve the lives of our neighbors across the globe

A vision statement can complement the mission statement, but it should never act as a replacement. Where a mission statement defines identity, a vision statement briefly describes the goals and ambitions of the organization.

#### **Sample Mission Statement:**

*“It is the mission of CER to provide relief to those on the edge by rebuilding communities and providing access to resources, in order to improve the lives of our neighbors across the globe.”*

#### **Sample Vision Statement:**

*“CER aspires to assist those in recovery from disaster and poverty by implementing long-term solutions and promoting self-sufficiency in survivors.”*

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<sup>1</sup> See Bibliography section *Organizational Longevity* for supporting research

## **Recommendation: Grant Management, Fundraising, and Budgeting**

In order to help CER build its legitimacy and attract resources, CER should consider clarifying its budget/fundraising efforts insofar that donors can differentiate the spin-off operation(s) from the parent organization.<sup>2</sup> In order to do so, CER should consider these general recommendations on grant management for small FBOs/NGOs:

1. Carefully review the contract conditions and negotiate if need be, to align with CER's mission statement and identity.
2. Provide donors with a complete budget including the core costs and indirect costs.
3. Maintain valuable financial record-keeping to track all expenditures related to the grant(s).
4. Provide donors with complete narrative and financial reports during and at the end of the grant period.

Moreover, CER should consider utilizing a fundraising platform in order to consistently raise funds.<sup>3</sup> Consistency in funding is important for organizational longevity. The following platforms are recommended based on their capability, convenience, and important usability factors. The recommended platforms are Qgiv and Tithely.<sup>4</sup> Both platforms are user-friendly and provide a robust giving experience. CER has a plethora of options, from secular options such as Paypal to platforms made specifically for religious organizations.

## **Recommendation: Budgeting**

In order to increase awareness, CER should consider developing a standardized budget to outline how financial resources are to be used during the fiscal year(s) and to account for all fiscal activities in a cohesive way. Developing a complete budget is important because budgets document an organization's policies, financial plans, and operation guides. Moreover, budgets can be used as a communication device to indicate an organization's short and long-term goals over a span of time.

There are various budget types that CER can utilize, however, we recommend the adoption of an Operating budget as well as a Cash budget to account for their fiscal activities.

An Operating budget discloses the flows of current financial resources only. It's a budget based on financial estimates to help predict expenses and allocate resources. Whereas a Cash Budget is merely an estimate of cash inflows and outflows over a period of time. It's important to note that a cash budget is not synonymous with cash on hand and is usually adopted in tandem with an operating budget. Refer to the figure on the side for an example of an Operating Budget.

Revenue	Amount	
General donations	\$2,500	
Appeals	\$1,500	
Monthly giving	\$1,200	
Fall gala	\$4,500	
Program fees	\$15,000	
In-kind donations	\$5,000	
	<b>Total revenue</b>	<b>\$29,700</b>
Expenses	Amount	
Salaries	\$17,000	
Payroll taxes	\$5,000	
Insurance	\$500	
Marketing & PR	\$500	
Office supplies	\$350	
Postage & Printing	\$400	
Professional services	\$1,500	
Program supplies	\$2,050	
Technology & Phone	\$1,500	
Travel & Mileage	\$900	
	<b>Total expenses</b>	<b>\$29,700</b>
	<b>Net gain/loss</b>	<b>\$0</b>

<sup>2</sup> See Bibliography section *Grant Management, Fundraising, and Budget* for supporting research

<sup>3</sup> See Bibliography section *Grant Management, Fundraising, and Budget* for supporting research

<sup>4</sup> See Bibliography section *Grant Management, Fundraising, and Budget* for supporting research



In addition to an operating budget, CER can utilize a Capital Budget when considering an investment in fixed assets/infrastructures such as a building purchase. A Special Purpose Budget is best for the development of a new project or when substantial changes are made to an existing project.

Moreover, CER should consider adopting a standardized budget format to present its budget. Budget documents like an Operating budget are typically presented in two main formats: (1) line-item format and (2) program format. We recommend the use of either format, however the line-item format is easier to prepare, simple to administer, and readily understandable by a range of audience.

A Line-item budget presents the expenses by grouping related costs together and upcoming income. Essentially, expenses are objects-of-expenditures. This budget format appropriates funds for items related to personnel, equipment, supplies, utilities, and any other items associated with specific accounts. In this format, it's easy to compare budgeted amounts to specific spending. Refer to the figure on the side for an example.

<b>Revenue</b>		
<b>Net Patient Revenue</b>		<b>\$97,980,000</b>
<b>Gift Shop Revenue</b>		<b>120,000</b>
<b>Endowment Investment Income</b>		<b>50,000</b>
<b>Total Revenue</b>		<b><u>\$98,150,000</u></b>
<b>Expenses</b>		
<b>Salaries</b>		<b>\$78,900,000</b>
<b>Supplies</b>		<b>15,400,000</b>
<b>Bad Debts Expense</b>		<b>2,200,000</b>
<b>Interest Expense</b>		<b>400,000</b>
<b>Rent</b>		<b>3,100,000</b>
<b>Total Expenses</b>		<b><u>\$100,000,000</u></b>
<b>Net Income (Loss)</b>		<b><u>(\$1,850,000)</u></b>

Meanwhile, a Program budget presents the full costs of programs or functions. Once adopted, appropriations are made to each project that the organization plans. It essentially displays a series of “mini-budgets” to show the costs of each program/project. Refer to the figures below for an example.

**Program Budget Organized by Program**

(000s)	Oncology	Rhinoplasty	Cardiology	Total
<b>Revenues</b>	<b>\$40,000</b>	<b>\$8,150</b>	<b>\$50,000</b>	<b>\$98,150</b>
<b>Expenses</b>	<b>37,000</b>	<b>17,000</b>	<b>46,000</b>	<b>100,000</b>
<b>Profit/(Loss)</b>	<b>\$3,000</b>	<b>\$(8,850)</b>	<b>\$4,000</b>	<b>\$(1,850)</b>

**Program Budget Organized by Function**

(000s)	Program Service		General & Administration	TOTAL
	Inpatient	Outpatient		
Salaries & Benefits	\$60,000	\$13,700	\$5,200	\$78,900
Supplies	11,300	3,100	1,000	15,400
Rent	2,500	500	100	3,100
Other	2,300	200	100	2,600
<b>Total</b>	<b>\$76,100</b>	<b>17,500</b>	<b>6,400</b>	<b>100,000</b>

## **Recommendation: Develop a Social Media Strategy**

In order to enhance its legitimacy and expand the reach of its mission, we recommend that CER increase its social media presence and interactions by developing a social media strategy and social media calendar. A strong, uniform, and clear social media presence will help to delineate CER from its parent organization. It will also work to reach more volunteers and donors, keep volunteers and donors informed and engaged, and spread its mission to social media users.

A sample social media strategy is included in Appendix 1. A sample social media calendar is included in Appendix 2. See bibliography Social Media section for further reading on recommendation justification.

The social media plan should be designed to educate those who are totally unfamiliar with CER with the organization's mission, leadership, volunteers, projects, and goals. We recommend that this be done by expanding to Instagram and LinkedIn while utilizing the strong Facebook page that CER already has.

Increased social media presence has many potential benefits for CER. It would allow CER to share its message on a global and local level.

Social media will allow CER to promote awareness of its mission and its message. It can be used to connect to new audiences; spread news about CER; introduce the community to CER volunteers, employees, and board members; and connect with people who need CER's services. Social media can allow CER to grow its volunteer and donor base. CER can use social media to inspire action outside of its own work and spread awareness about important causes. Platforms can showcase CER's projects and role in the community to increase CER's legitimacy and legacy.



## **Facebook**

Facebook is the largest social media application with 2.80 billion monthly active users as of 2021 (Newberry 2021). According to Edison Research, 63% of U.S. adults over the age of 12 use this platform. Facebook has significant percentages of users between thirteen and sixty-five years of age. However, 18.8% of Facebook users are male between 25-34 years of age, which is the largest group for one age demographic (Newberry 2021). Facebook reaches the largest number of teens ages thirteen to seventeen, globally, when compared to all other social media sites. According to Pew Research Center, the share of older Americans on the platform has more than doubled since 2012, and among Americans 65 and older, 46% use Facebook. Compare that with 11% on LinkedIn (Newberry 2021). Some research suggests to target the millennial + sector on Facebook, but this does not track with the largest demographic with Facebook accounts.

The goal of the Facebook would be to attract new volunteers and donors ages twenty-five to sixty-five and over. The Facebook page can continue to update CER affiliates with current projects and goals. The page can be used to share documents, photos, and links. Tailoring posts to the older audience may fill a gap that Instagram does not reach. However, the CER Facebook page is a great place to keep a lot of organizational information.



## **Instagram**

Instagram is one of the largest social media platforms with around one billion monthly active users. It is particularly popular in the United States and India, which have around 140 million Instagram users each. The number of Instagram users has consistently grown since its founding in 2010 (Sehl 2021).

Instagram users vary in age from thirteen to sixty-five and over; however, some demographics use Instagram more than others. The highest percentage of users are between eighteen to forty-four with 33% of users being between twenty-five and thirty-four as of January 2021 (Sehl 2021).

A particularly useful feature of Instagram is the Instagram Stories feature that competes directly with Snapchat. In January 2019, Instagram found that there 500 million daily active Instagram Stories users (Sehl 2021). Stories only remain on an organization's page for 24 hours and then they disappear unless they are added to a highlight on one's page. Stories are a great way to have followers interact with an organization's page; Stories have multiple features to solicit feedback from viewers. An organization can ask poll questions with two options to answer, open-ended short responses, or four answer quizzes. These can be a fun way to teach viewers trivia about the organization or its members. It can also be a helpful way to see what viewers find interesting and engaging.

The target audience of CER's Instagram should be 14-35 age potential and existing volunteers. Instagram content will not be as in depth and detailed as Facebook or LinkedIn content. Instagram allows users to provide photographic, video, and infographic snapshots of an organization's goals, mission, leadership, volunteers, donors, projects, and goals. Instagram is a good platform for drawing attention to other websites or sources of information. Tools such as linktree can be used to provide links on CER's Instagram to other pages.



## **LinkedIn**

LinkedIn has users in significant percentages from fifteen years of age to fifty-five and above. The majority of users were forty-six years old and older. It is a smaller social media platform with over 722 million members, only 40% of which use the platform on a daily basis (Newberry 2021 LinkedIn).

The lower number of members is a strength and a weakness. It is more likely that CER's posts will be viewed by users, just not as many people will see it. There will likely not be a need to post as often on LinkedIn; although, consistent posting is always important.

The goal audience of the LinkedIn should be existing and potential partners, adult potential volunteers, and existing and potential donors. LinkedIn is a professional networking application that is meant to create connections between professionals in similar fields, to help users find employment and volunteer opportunities, and to showcase an organization's accomplishments and projects. Unlike Facebook, LinkedIn is not very conducive for group conversations or discussions. While people can connect, the messaging application on LinkedIn is best for one-on-one conversations. LinkedIn content should be tailored to content an organization would share in a conference and maybe a newsletter. Facebook and Instagram are more appropriate for personal, highly emotional posts and content.

By creating a presence on LinkedIn, CER can showcase its business acumen, which will impress donors. CER can promote its program management and fundraising strategies as well as its professional proficiency and knowledge of disaster relief.

## **Social Media Calendar**

A social media calendar will help CER plan out its posts on each platform. It only needs to be as detailed as useful. When deciding how detailed to make the calendar consider who is making the calendar versus who is creating the posts? If they will be the same person, then the calendar does not need to be overly detailed. The calendar can serve as a place for the creator to store ideas, to avoid forgetting them, and to avoid posting too similar content consecutively. A social media calendar also serves as a reminder to post consistently.

Social media calendars also help organizations to anticipate key events that are important to their cause such as Christian holidays and international days of giving. For example, #GivingTuesday is an important social media event for nonprofits. Planning posts can help CER avoid typos in posts and grow more ambitious in social media strategy over time. Finally, a calendar of posts can help CER track what posts are successful, what time of day to post works well, and what kind of content engages the largest audience. If CER ever wants to conduct a social media audit,

a calendar of past posts will be useful. Eventually this data may indicate that one social media platform is better suited for CER than another.

#### How far out to plan

How far out into the future to plan will depend on how useful CER is finding planning to be. Most organizations plan a week at a time in order to stay current with their programming and events and in order to stay current with social media trends in content, such as particular memes or challenges.

#### How often to post

How often to post on each social media site varies from platform to platform. Instagram and Facebook prioritize the most recent posts, which means that posting frequently will be advantageous. LinkedIn prioritizes posts based on themes and content, so posting daily or even biweekly may not be a good use of time. The most important thing about the frequency of posting is to post consistently on all platforms. Figure out what is sustainable for CER and keep that going. For example, CER may consider posting on Instagram Stories three times a week while doing a main Instagram post once a week; posting on Facebook twice a week; and posting on LinkedIn once a week.

#### What time to post

Successful posting time varies from platform to platform. We recommend starting off by posting on each platform before 8:00 am or after 5:00 pm, and then experiment from there based on which posting times result in the most views, likes, or interactions. More specific strategies for determining optimal posting times are included in the bibliographical materials; however, we advise starting with basic observations of which posting times correlate to the most successful posts. The more CER's social media use and presence grows, the more advanced the posting time strategy can become.

### **General Recommendations**

On all platforms we recommend following similar organizations and “model” organizations for inspiration. Follow and friend people who have already liked CER's Facebook page, board members, current volunteers and donors, and personal friends of employees.

Share all of your new social media profiles on CER's website, in the Newsletter, and on its existing Facebook page.

An intern position would be well suited for helping to run social media at least periodically. A social media calendar could also allow volunteers to sign up to manage the platforms on a weekly or monthly basis. Either of these options would require a social media policy for CER to be in place to provide creators with structure and guidelines.

When posting on Facebook and Instagram especially, share stories about people. Studies confirm that posts with pictures of people in them tend to receive more engagement. A study by the Georgia Institute of Technology found that photos that contain faces are 38% more likely to receive likes and 32% more likely to receive comments. Sharing stories about people helps to build and maintain trust with viewers. If CER can show who founded the nonprofit, the motivations behind its founding, who keeps it running, and why people volunteer it will help inspire others to become involved. It is also helpful to the stories of people and communities that CER serves.

Posting shareable content will help grow your engagement and number of followers. This includes posts that offer people something valuable such as a fact or anecdote. Moving visuals and videos are often shared as well. The carousel feature on Instagram can be used to explain complex information or to share information in multiple languages in a series of images.

We recommend setting up the Instagram and LinkedIn accounts as nonprofit accounts as opposed to personal accounts, similar to how CER's Facebook page is listed as a Charity Organization, NGO. Most social media platforms have special features and resources for nonprofits. Utilize the donation buttons on Facebook and Instagram along with their other fundraising tools. There are many free training resources for social media available to nonprofit organizations.

Some include:

- Facebook Blueprint Free Online Training in Nonprofit Marketing
- The Facebook account "Nonprofits on Facebook"
- Learning LinkedIn's Get Started with LinkedIn course
- LinkedIn's nonprofit webinars
- LinkedIn for Nonprofits offers up to a 50% discount on Talent, Learning, Fundraising, and Marketing solutions
- Hootsuite's nonprofit discount
- Hootsuite's free guide on how to use it

Use partner connections as part of CER's social media strategy. Tag partners in posts so that partners can easily share your content and draw more people to your page. Working with partners on joint content such as a video with members from both groups is helpful as well and can introduce a new audience to your organization.

Hosting online events can encourage involvement especially during the COVID-19 pandemic. Online events will help members and volunteers meet and come together regardless of whether they live in Nepal or Pennsylvania. LinkedIn supports online live events as does Facebook.

## Helpful Potential Tools



Linktree

Linktree is a downloadable program that will allow CER to attach multiple links to outside websites on its Instagram. It could be useful for linking to a fundraising website, CER's main website, and CER's other social media accounts. There are free versions of Linktree available.



Canva

Canva is a website for creating graphics. There are free and purchasable versions of Canva. CER can use Canva to create posts for all social media platforms and even to create printable graphics.



Hootsuite

Hootsuite is a software that helps an organization manage multiple social media platforms. Without the nonprofit discount, it costs around \$49 a month, so it may be useful once CER develops its social media strategy and presence further. Hootsuite can help plan posts, provide analytics and insights on posts, allow the user to assign posts to members within the organization, and more.

## **Recommendation: Goal Setting and Strategic Planning<sup>5</sup>**

Creating short-term and long-term goals is an important step to increasing a young organization's chance of survival and longevity. Goals should be specific and realistic. To begin, consider CER's specialized skills and the services you want to provide. Then assess the available

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<sup>5</sup> See Bibliography section *Organizational Longevity* for supporting research

resources currently available to CER, and the resources CER aspires towards. Goals can be refined by receiving input from stakeholders and relevant partners.

Once goals have been set, a strategic plan will create a roadmap to achieving them. An organization's strategic plan is the mission and vision statements put into action. The strategic plan will include four components: A description of the organization, an analysis of the organization's current standing, organizational goals and strategies, and methods for evaluating progress. These components can be expanded on, depending on CER's needs each 3-5 years.

### **Strategic Plan Template:<sup>6</sup>**

- o Mission and vision statements
- o Description of the organization and its background
- o Layout of the organization or an organizational chart
- o SWOT Analysis<sup>7</sup>
  - Internal strengths
  - Internal weaknesses
  - External opportunities
  - External threats
- o Goals
  - Finances
    - Strategies for meeting the goal:
      - o Create short- and long-term budgets
      - o Develop a grant database
  - Partnerships
    - Strategies for meeting the goal
      - o Connect with other relief organizations
      - o Participate in government partnerships where appropriate
  - Projects and Relief Efforts
    - Strategies for meeting the goal
      - o Develop timelines and budgets for projects
      - o Develop preparedness plans for potential disasters
  - Volunteer Recruitment and Retainment
    - Strategies for meeting the goal
      - o Survey current volunteers for their experiences
      - o Develop a volunteer recruitment plan
      - o Develop a volunteer retainment plan
- o Method for Evaluating Progress
  - review volunteer feedback
  - Schedule evaluations with board members and stakeholders

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<sup>6</sup> See Table of Contents for detailed sections on the categories referred to in the strategic plan template

<sup>7</sup> See Appendix 4: SWOT Analysis



## **Recommendation: Prioritize Local Partnerships**<sup>8</sup>

Developing and maintaining strong relationships is not only a way for an organization to increase longevity but can also help CER overcome resource constraints. CER should look at partnership building as an opportunity to expand awareness and legitimacy of their own organization.

Before CER can seek out new partnerships, it's important to take stock of what CER is hoping to gain from a partnership and what CER has to offer in return. This is a moment for CER to consider their weaknesses and to use partnerships to overcome them. CER could gain resources, an increased donor pool, volunteers, support while traveling in the form of lodging or local guidance, and much more from its partners. Similarly, CER should also recognize their strengths as assets that could be beneficial to partners. CER has a wealth of knowledge about disaster relief, skills in construction, and its own network that could be offered as resources to partners.

Forming partnerships is an ongoing process. Networking can be done formally through outreach efforts or informally through connecting with individuals and other organizations during relief efforts. The initial point of contact with a potential partner should be followed up with a way for that partner to learn more about CER. CER can make itself more accessible by maintaining a website with a description of CER, its mission and vision statements, a list of services offered, and contact information. Social media and newsletters can also be resources for potential partners to learn more about the organization.<sup>9</sup>

## **Best Practices: Partnership Development and Maintenance**<sup>10</sup>

- Keep CER's identity a focal point.
  - Include CER's Mission Statement on webpages, social media profiles, newsletters, and other promotional materials
- Promote informal communication, which has been shown to increase trust in partnerships
  - Make personal connections with partners, communicate consistently, and be willing to listen to partner needs and concerns
- Be as transparent and inclusive with partners as possible
  - Keep partner updated on projects and CER's work, make them feel involved in CER's successes
  - Make your network a community
- Be open to contacting other NGOs during relief efforts
  - Prioritize CER's core values of helping those on the edge
- Keep an updated list of partnerships
  - Include who the partner is, what they do, each member's role in the partnership

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<sup>8</sup> See Bibliography section *Partnerships* for supporting research

<sup>9</sup> See report section on Digital Strategies

<sup>10</sup> See Bibliography section *Partnerships* for supporting research

**Guiding Question: How can CER develop a larger pool of volunteers?**

**Goal: Characterize and comprehend disaster relief, including recovery, experiencing fatigue as an opportunity to partner with local, regional, and/or national service sponsorship Partners.**

**Recommendation: Expand Volunteer Base**

Volunteers are quintessential to CER’s operation, as such, developing a larger pool of volunteers is imperative to support activities.

CER should consider formal disaster and fatigue training for volunteers in order to yield even higher quality of service and to improve their ability to respond to disasters.<sup>11</sup> For example, Red Cross Educational Materials can be used to provide disaster response training.<sup>12</sup> CER can host CPR/BLS training volunteers in their facilities.

CER should consider building detailed and engaging orientations and guidelines for volunteers in order to (1) welcome new volunteers, (2) acquaint volunteers with the mission, and (3) outline the tasks, responsibilities, and expectations.

**Sample Volunteer Orientation Program**

CER should consider conducting orientations in group settings in order to promote team-building and improved collaboration. CER should conduct the onboarding process at times that volunteers are more likely to attend. CER should consider online orientations to allow volunteers to engage with the orientation material at their own pace and to save time and money.

**Pre-Orientation**

- Prepare orientation materials
- Send a welcome email and orientation invitation
- Send orientation confirmation, itinerary, and supporting materials

**Orientation**

- Welcome volunteers
- Introduce staff
- Review administrative procedures
- Provide a tour of the facility (if applicable)
- Organizational overview
  - Mission statement, vision and goals
  - Overview of programs, projects, and services
- Organizational culture overview
  - Policies and procedures
  - Key terms
- Volunteers policies and procedures

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<sup>11</sup> See Bibliography section *Volunteerism* for supporting research

<sup>12</sup> See Bibliography section *Volunteerism* for supporting research

- Closing remarks

Post-Orientation

- Thank-you email and follow-up materials
- Additional training (if applicable)

**Recommendation: Develop a Volunteer Orientation Manual**

CER should consider developing an orientation manual to prepare volunteers before orientation.

The manual should include:

- Staff inventory
- Volunteer inventory
- Mission Statement
- List of Board of Directors
- Volunteer Check-In procedures
- Dress code (if applicable)
- General orientation rules and procedures

To further attract and retain volunteers, CER should consider asking for feedback from volunteers about their volunteer experiences shortly after the completion of each project. This feedback will provide CER with volunteers' opinions regarding their service experience. As well as recommendations for improvements to enhance the service experience. Volunteer feedback can be administered and provided via a simple Google Question Form.

**Volunteer Feedback Template**

CER should consider keeping the surveys to 12 questions or less as shorter questions yield higher response rates. And, the survey should be easy to fill out.

Here are some sample questions to get CER started:

- Matrix Questions<sup>13</sup>
  - How satisfied did you feel after volunteering?

How satisfied did you feel...

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
After volunteering?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How likely are you to...

	Very Unlikely	Unlikely	Somewhat Likely	Likely	Very Likely
Recommend future volunteer opportunities to your friends?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

---

<sup>13</sup>See Bibliography section *Volunteerism* for supporting research

- How likely are you to recommend future volunteering opportunities to your friends and family?
- How likely are you to volunteer in the future with us?
- Radio Button Questions<sup>14</sup>
  - Did the experience meet your expectations?
  - Do you plan to volunteer with us in the future?

Did the experience meet your expectations?

Yes

No

What could we have improved?

CER should continue to clearly and consistently communicate with existing volunteers through their monthly newsletter. Additionally, CER should augment their social media usage across all platforms in order to attract and retain volunteers.<sup>15</sup>

### **Recommendation: Volunteer Recruitment Plan<sup>16</sup>**

Volunteers provide another avenue for organizations to overcome resource constraints and to increase awareness of the organization.

Recruiting new volunteers can be challenging for small organizations, but a recruitment plan can help set realistic goals and inform future efforts. The plan should include information on why people do and don't choose to volunteer so that these reasons can be used to CER's advantage. People volunteer for a wide range of reasons from altruism, to professional growth. A recruitment plan will narrow these reasons into the ones that CER is best suited to fulfill. People choose not to volunteer due to time constraints, varying abilities to commit, compassion fatigue, etc. The recruitment plan will identify ways to overcome these limitations, in order to make volunteering with CER more attractive.

Promotional materials and outreach efforts can be tailored to CER's specific volunteer needs and offered benefits. Before developing recruitment materials for outreach, an organization should make a list of what kind of volunteers they need, and what they can offer to volunteers in return. This list should be made in consideration of the reasons that people may or may not choose to

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<sup>14</sup> See Bibliography section *Volunteerism* for supporting research

<sup>15</sup> See Bibliography section *Volunteerism* for supporting research

<sup>16</sup> See Bibliography section *Volunteerism* for supporting research

volunteer in the first place so that any call to action is strategically designed around those reasons.

### **Recruitment Plan Template<sup>17</sup>:**

- Introduction
  - Mission and Vision Statements
  - Why volunteers are important to CER
- Volunteerism Analysis
  - External:
    - Why people choose to volunteer
      - Altruism
      - professional growth
      - social opportunity
    - Why people choose not to volunteer
      - Time constraints
      - Financial constraints
      - Lack of understanding about an organization
  - Internal:
    - What types of volunteers does CER need?
      - Short-term and long-term
      - Domestic and International
      - Volunteers with specific skills
        - such as construction, plumbing, etc
      - Volunteers who are flexible and adventurous
      - Volunteers whose ideals align with CER's
    - What can CER offer to its volunteers?
      - Moral satisfaction
      - New experiences
      - Social networking and community
      - The opportunity to learn new skills
      - Professional Development
    - What does CER need to overcome to gain volunteers?
      - Financial Limitations
      - Compassion fatigue that occurs following disaster relief efforts
- Outreach: Finding new volunteers
  - Develop promotional materials
    - Include a variety of mediums
      - Digital platforms, flyers, pamphlets, newsletters, etc
    - Always include the Mission Statement and focus on CER's identity
    - Include links to request more information on volunteering with CER
    - Offer small commitment options for potential volunteers to start with
    - Highlight successful projects, previous or current volunteers, and what CER has to offer
    - Create separate materials for specific volunteer needs

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<sup>17</sup> See Bibliography section *Volunteerism* for supporting research

- Ex: separate materials for domestic and international volunteers
  - Make CER accessible
    - Keep webpages and social media profiles updated with volunteer information and opportunities
    - Develop flexible volunteer options for people to choose from
  - Make connections
    - Host recruitment events for people to become familiar with CER
    - Visit schools, colleges, churches
- Evaluation of recruitment efforts
  - Assess volunteer recruitment success and refine your plan as necessary

**Guiding Question: Are the services that CER offers too diverse?**

**Goal: Model identification or development for resource allocation and prioritization processes when selecting service opportunities.**

**Recommendation: Complete a comparison of monetary costs and benefits of all programs**

Cutting Edge Relief offers many services domestically and abroad. In order to determine which programs are sustainable and beneficial, we recommend that CER informally yet consistently compare the costs and benefits of all programs. A valuation and comparison of costs and benefits can serve as a potential model for resource allocation and project prioritization.

We recommend that CER apply some principles of formal Cost Benefit Analysis (CBA) to its method of valuation and comparison. However, a formal CBA may be too time consuming and complex for its value at this time. This conclusion is based on CER's identified weaknesses of having no current program evaluation methods, no long-term budgets, and a limited number of employees and volunteers (see SWOT analysis in Appendix 4). Conducting formal CBAs for projects could be an organizational goal after CER grows in capacity. A sample formal CBA is attached in Appendix 3.

CER's methods of valuation and comparison should translate the listed outputs and inputs of a project into monetary statements of economic value. Translating incommensurable things like public health services into monetary statements of value allows them to be clearly and accurately compared.

Measuring economic cost needs to include time, resources, and dollars contributed to the project by each stakeholder. Often, the time of each contributor has to be valued and opportunity costs have to be accounted for. Measuring economic benefits can be tricky especially when there is no market for the benefit you are providing. If a market exists for the service, CER could look at the price of such goods. If a market does not exist, CER can ask recipient's what their willingness to pay would be for such services. Willingness to pay may not be representative of true value when the population asked or served is very poor. CER could also estimate the time that recipients are willing to wait for a service or the effort that recipients are willing to put in to participate in a program or to receive a service. These complications are why we suggest that CER avoid a formal CBA and conduct a more general valuation.

#### **Program Monetary Valuation and Comparison Template**

- Create a master list of offered services or programs.
- For each program:
  - Identify how long the project is intended to last.

- Is this a five-year project or a one-time project?
- Value the first year of the program or start up costs apart from operational costs.
  - Will there be a training period?
  - What will change between the first year of the program and the last year of the program?
    - Consider applying a discount rate, compounding factor, or inflation factor to costs for projects that last more than a year.
- Who are the stakeholders for each project?
  - Potential stakeholders: volunteers, CER, donors, program recipients, neighboring communities, and partner organizations.
  - Think of each entity and group that will contribute in time or treasure to the program.
    - Who will be contributing monetary donations?
    - Who will be donating building supplies?
    - Who will be conducting training?
    - Who will be building chicken coops or repairing homes?
  - Identify who will benefit from the program? Who will be harmed or displaced from other work or resources due to the project?
    - Will more than the family, center, or village receiving the service benefit?
    - Does the project have more value to one recipient than another?
- Attach a value to stakeholder's time and account for labor costs.
  - Think of what the stakeholder could have been doing instead of participating in this project or program.
    - How valuable would that time be?
      - For example if you have a volunteer electrician, how much is he or she foregoing in wages to volunteer his or her time?
      - Is a program recipient foregoing school or work to learn how to take care of nanny goats or tend to the beehive?
      - Does a program recipient have to pay for child care to participate? Does he or she have to travel? What are the costs of childcare and travel?
    - Does the project require hired help? How much must that person be paid?
- Assess stakeholders willingness to pay for the project or services provided.
  - Ask program recipients how monetarily valuable this project is to them.
    - Keep in mind that values can vary based on the wealth of the population served.
  - Survey program recipients on how long they would be willing to wait to receive such service or what they'd be willing to contribute to participate.
    - Attach monetary value to their time and effort.



- See if a market exists for your services, and if so what is being charged for services similar to what you provide?
- Identify and value capital costs.
  - What supplies are needed for the project?
    - How valuable is the tool compared to how many times it is being used in a project?
    - What would it cost to rent tools compared to buying tools?
    - If relying on volunteers to bring tools,
      - Consider the value added in that donation.
      - Will the tool stay with CER or remain with the volunteer?
        - Value the donation differently accordingly.
  - Do those supplies vary in cost over time?
  - Will extra supplies be needed?
    - Could spare supplies spoil or breakdown in storage?
- Add up all costs and benefits to calculate a net benefit or loss from the project.
- Compare net project totals.
  - Ensure when comparing program totals that the program totals were calculated for the same amount of time or note that one program lasts a year while another lasts five, for example.
- Prioritize projects based on those that have the highest net benefit.

CER can begin the process of evaluating their programs and services by viewing our Strengths Weaknesses Opportunities and Threats (SWOT) analysis included in Appendix 4. CER may consider conducting its own SWOT analysis using ours as an example.

Putting projects into terms of monetary costs and benefits will allow CER to compare projects using a standardized metric. However, CER values projects outside of a monetary framework, and other metrics can be developed to evaluate projects. For example, CER could assign ranks to projects based on how much they align with and further CER's mission and goals.

We recommend that CER develop a framework for comparing projects whether it be the one described above, a formal CBA, or something else. The framework should put each program's outputs and inputs into measurable metrics that will allow for explicit comparison over time.

## Methodology

In order to begin our consultation, we first examined the three questions posed by CER:

*How can CER increase its footprint for greater awareness and legitimacy?*

*How can CER develop a larger pool of volunteers?*

*As a start-up, are the services we offer too diverse? Are we doing too much?*

We used these questions to inform our work as we developed recommendations for CER regarding the following requests:

*Characterize and comprehend disaster relief, including recovery, experiencing fatigue as an opportunity to partner with local, regional, and/or national service sponsorship Partners.*

*Identify the challenges and successful practices of spin-off operations, where an initiative of an agency is separated into its own entity.*

*Model identification or development for resource allocation and prioritization processes when selecting service opportunities.*

### Phase 1: Research

In order to begin our consultation we first assess CER's current standing. This was done by reviewing materials provided by B. Richardson on CER's organization and its services. Information collection on CER was followed up with a literature review on Faith-Based nonprofits and disaster relief organizations. The literature review was tailored to organizational legitimacy and longevity by focusing on the following topics: Identity, partnerships, strategic planning, volunteerism, and resource attainment.

### Phase 2: Analysis

We used a qualitative approach when analyzing data on CER and other nonprofits. To do this we used a cross-analysis to identify key trends in the literature and a SWOT analysis to determine CER's strengths and weaknesses.

### Phase 3: Application

The final phase of this consultation involved applying our data analyses to CER to develop specific recommendations. Our recommendations are designed to answer the primary research questions posed by CER above, in consideration with the tasks assigned to our group. This yielded the following sections of recommendations and best practices: Organizational Identity, Budgeting, Social Media Strategy, Goal Setting and Strategic Planning, Volunteer Recruitment and Retainment, Partnerships, and Cost and Benefit Valuation and Comparison.

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## **Appendices**

1. Sample Social Media Strategy
2. Sample Social Media Calendar
3. Sample Cost Benefit Analysis
4. SWOT Analysis

# **Appendix 1**

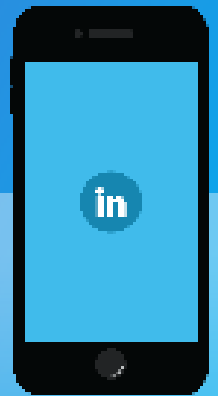
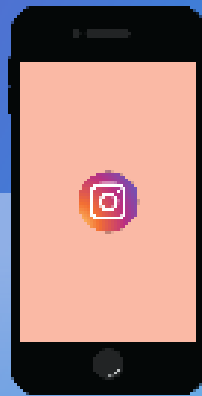
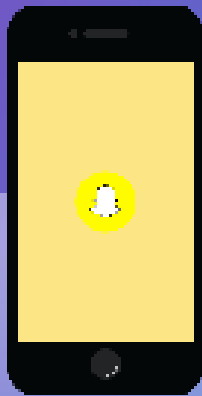
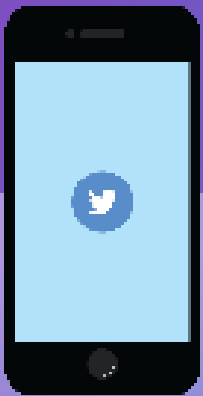
## **Sample Social Media Strategy**



GUIDE

# Social Media Marketing Strategy

Eight easy steps to develop your social media presence



## Contents

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## Related resource

[The Social Media Metrics that Really Matter—and How to Track Them](#)

# Step 1

## Set social media marketing goals that align to business objectives

The more specific your strategy is, the more effective the execution will be. Set SMART goals and track the right metrics to set yourself up for success.

### Set SMART goals

The first step to creating a social media marketing strategy is to establish your objectives and goals. Without goals, you have no way to measure your success or your social media return on investment (ROI).

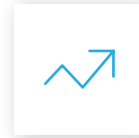
Each of your goals should be:



**Specific**



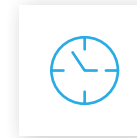
**Measurable**



**Attainable**



**Relevant**



**Time-bound**

An example of a SMART goal for your business might be "Grow our Instagram audience by 50 new followers per week."

With SMART goals, you'll make sure your goals actually lead to real business results, rather than just lofty ideals.

## Track meaningful metrics

While vanity metrics like retweets and likes can be fun to share and easy to track, it's hard to prove their real value for your business. Instead, focus on targets such as leads generated, web referrals, and conversion rate.

You may want to track different goals for different channels, or even different uses of each channel. For example, you can use paid campaigns to increase brand awareness, but measure acquisition and engagement for organic social posts.

Make sure to align your social media goals with your overall marketing strategy. This will make it easier for you to show the value of your work and get executive buy-in and investment.

Start developing your social media marketing plan by writing down at least three social media goals.

### Goals

- 1.
- 2.
- 3.

## Related resource

[How to build audience personas](#)

## Step 2

### Learn everything you can about your audience

If you're not engaged in social media listening, you're creating your business strategy with blinders on—and you're missing out on mountains of actionable insights from real people who are actively talking about you or your industry online.

Here's how to start listening and building your understanding of your audience and their needs.

#### Create audience personas

Knowing who your audience is and what they want to see on social is key to creating content that they will like, comment on, and share. This knowledge is also critical for planning how to develop your social media fans into customers for your business.

Try creating audience personas. For example, a retail brand might create different personas based on demographics, buying motivations, common buying objections, and the emotional needs of each type of customer.

Personas sharpen your marketing tactics. Luxury buyers, for example, might not respond to Facebook ads with sales. But they might respond to Facebook ads with exclusive in-store events to be the first to see a new line of clothing. With personas, you'll have the customer insights you need to create campaigns that speak to the real desires and motivations of your buyers.

### **Gather real-world data**

Don't make assumptions. Social media analytics can also provide a ton of valuable information about who your followers are, where they live, which languages they speak, and how they interact with your brand on social. These insights allow you to refine your strategy and better target your social ads.

[Jugnoo](#), an Uber-like service for auto-rickshaws in India, used Facebook Analytics to learn that 90 percent of their users who referred other customers were between 18 and 34 years old, and that 65 percent of that group was using Android. They used this information to target their ads, resulting in a 40 percent lower cost per referral.

## **Related resources**

[How to conduct a competitor audit](#)

[Getting started with social listening](#)

[Watch: How to set up social listening streams](#)

## **Step 3**

### **Research the competition**

Odds are, your competitors are already using social media—and that means you can learn from what they're already doing.

#### **Conduct a competitive analysis**

A competitive analysis allows you to understand who the competition is and what they're doing well (and not so well). You'll get a good sense of what's expected in your industry, which will help you set some social media targets of your own.

This analysis will also help you spot opportunities. For example, maybe one of your competitors dominates on Facebook, but has put little effort into Twitter or Instagram. You might want to focus on the networks where your audience is underserved, rather than trying to win fans away from a dominant player.

#### **Engage in social listening**

Social listening is another way to keep track of the competition.

As you track your competitors' accounts and relevant industry keywords, you may notice strategic shifts in the way competitors use their social accounts. Or you might spot a specific post or campaign that really hits the mark—or one that bombs.

Keep an eye on this information and use it to evaluate your own goals and plans.

## Related resource

[Hootsuite's social media audit template](#)

# Step 4

## Conduct a social media audit

Conducting a social media audit helps you assess how well your current social media use works for you.

### Evaluate your current efforts

If you're already using social media tools, you need to take a step back and look at what you've already accomplished. Ask yourself the following questions:

- What's working?
- What's not working?
- Who's connecting with you on social?
- Which social media sites does your target market use?
- How does your social media presence compare to that of your competitors?

Once you gather all this information in one place, you'll have a good starting point for planning how to improve your results.

Your audit should give you a clear picture of what purpose each of your social accounts serves. If the purpose of an account isn't clear, think about whether it's worth keeping. It may be a valuable account that just needs a strategic redirection, or it may be an outdated account that's no longer worth your while.

To help you decide, ask yourself the following questions:

1. Is my audience here?
2. If so, how are they using this platform?
3. Can I use this account to help achieve meaningful business goals?

Asking these tough questions now will help keep your social media strategy on track as you grow your social presence.

### Look for impostor accounts

During your audit process, you may discover fraudulent accounts using your business name or the names of your products—that is, accounts that you and your business don't own.

These imposter accounts can be harmful to your brand (never mind capturing followers that should be yours), so be sure to report them. You may want to get your social accounts verified to ensure your fans and followers know they are dealing with the real you.

## Related resources

### [Watch: How to optimize your social profiles](#)

We've also got step-by-step guides for each network to walk you through the process:

### [Create a Facebook business page](#)

### [Create an Instagram business account](#)

### [Create a Twitter business account](#)

### [Create a Snapchat account](#)

### [Create a LinkedIn Company Page](#)

### [Create a Pinterest business account](#)

### [Create a YouTube channel](#)

### [Create a WeChat business account](#)

Don't let this list overwhelm you. Remember, it's better to use fewer channels well than to stretch yourself thin trying to maintain a presence on every social network.

### [Finally, here's a quick reference guide for image sizes for every network.](#)

## Step 5

### Set up accounts and improve existing profiles

Decide which networks you'll focus on, and then set up and optimize your accounts.

#### Determine which networks to use (and how to use them)

As you decide which social channels to use, you'll also need to define your strategy for each network. For example, you might decide to use Twitter for customer service, Facebook for customer acquisition, and Instagram for engaging existing customers.

It's a good exercise to create mission statements for each network. These one-sentence declarations will help you focus on a very specific goal for each account on each social network.

For example, you could decide that:

- Facebook is best for acquiring new customers via paid advertising.
- Instagram is where you build brand affinity with existing customers.
- Twitter is where you engage press and industry influencers.
- LinkedIn is where you engage existing employees and attract new talent.
- YouTube is where you support existing customers with education and video help content.
- Snapchat is where you distribute content with the goal of building brand awareness with younger consumers.

If you can't create a solid mission statement for a particular social network, you may want to reconsider whether that network is worth it.

#### Set up (and optimize) your accounts

Once you've decided which networks to focus on, it's time to create your profiles—or improve existing profiles so they align with your strategic plan.

In general, make sure you fill out all profile fields, use keywords people will use to search for your business, and use images that are correctly sized for each network.

## Step 6

### Find inspiration

While it's important that your brand be distinctive and unique, you can still draw inspiration from other businesses that are great on social.

#### Social network success stories

All of the social networks feature success stories that highlight how brands are using their tools effectively. You can usually find these on the business section of the social network's website. (For example, take a look at the [Facebook business success stories](#).) These case studies offer valuable insights you can apply to your own goals for each social network.

#### Award-winning accounts and campaigns

For examples of brands that are at the top of their social media game, check out the winners of [The Facebook Awards](#) or [The Shorty Awards](#).

## Step 7

### Create a social media content calendar

Sharing great content is essential, of course, but it's equally important to have a plan in place for when you'll share content to get the maximum impact.

Your social media content calendar also needs to account for the time you'll spend interacting with your audience (although you need to allow for some spontaneous engagement as well).

#### Create a posting schedule

Your social media content calendar lists the dates and times at which you will publish types of content on each channel. It's the perfect place to plan all of your social media activities—from images and link sharing to blog posts and videos.

Your calendar ensures your posts are spaced out appropriately and published at the optimal times. It should include both your day-to-day posts and your content for social media campaigns.

#### Related resources

[How to create a social media content calendar](#)

[Watch: How to save time with bulk scheduling](#)



## Plot your content mix

Make sure your calendar reflects the mission statement you've assigned to each social profile, so that everything you post is working to support your business goals. For example, you might decide that:

- 50 percent of content will drive traffic back to your blog
- 25 percent of content will be curated from other sources
- 20 percent of content will support enterprise goals (selling, lead generation, and so on)
- 5 percent of content will be about your employees and company culture

Placing these different post types in your content calendar will help ensure you maintain the ratio you've planned. If you're starting from scratch and you're simply not sure what types of content to post, try the 80-20 rule:

- 80 percent of your posts should inform, educate, or entertain your audience
- 20 percent can directly promote your brand

You could also try the social media rule of thirds:

- One-third of your social content promotes your business, converts readers, and generates profit
- One-third of your social content shares ideas and stories from thought leaders in your industry or like-minded businesses
- One-third of your social content involves personal interactions with your audience

Once you have your calendar set, use scheduling tools or bulk scheduling to prepare your posting in advance rather than updating constantly throughout the day. This allows you to focus on crafting the language and format of your posts, rather than writing them on the fly whenever you have time.

## Step 8

### Test, evaluate, and adjust your strategy

Your social media strategy is a hugely important document for your business, and you can't assume you'll get it exactly right on the first try.

As you start to implement your plan and track your results, you may find that some strategies don't work as well as you'd anticipated, while others are working even better than expected.

#### Track your data

In addition to using the analytics tools available within each social network, use UTM parameters to track visitors as they move through your website, so you can see exactly which social posts drive the most traffic to your website.

#### Re-evaluate, test, and do it all again

When data starts coming in, use it to reevaluate your strategy regularly. You can also use this information to test different posts, campaigns, and strategies against one another. Constant testing allows you to understand what works and what doesn't, so you can refine your strategy in real time.

Surveys can also be a great way to find out how well your strategy is working. Ask your social media followers, email list, and website visitors whether you're meeting their needs and expectations on social media. You can even ask them what they'd like to see more of—and then make sure to deliver on what they tell you.

Things change fast on social media. New networks emerge, while others go through significant demographic shifts. Your business will go through periods of change as well. All this means that your social media strategy should be a living document that you look at regularly and adjust as needed. Refer to it often to keep you on track, but don't be afraid to make changes so that it better reflects new goals, tools, or plans.

When you update your social strategy, make sure to let everyone on your social team know, so they can all work together to help your business make the most of your social media accounts.

## Bonus: Download our social media strategy template

Does this all feel a little overwhelming? The truth is that building your social media strategy is a substantial job. It should be, since it's such an important document for your business. But it doesn't have to be complicated.

We've created a template to guide you through the whole process of creating your social media marketing plan. [Visit our blog](#) to download it (plus six other social media templates that can save you hours of work).

## Take the next leap in your social media career

### Hootsuite Academy

Earn industry-recognized social media certifications that will make you stand out from the crowd.

Begin with our free comprehensive training on social marketing. All of our courses are delivered online and taught by expert industry practitioners. [Take the free course here.](#)

### Build a professional workflow with Hootsuite

From scheduling Instagram posts to advanced ROI measurement, Hootsuite's flexible platform helps you execute every aspect of your social media strategy. We're the world's most widely used platform for managing social media.

[Get started with the plan that fits your needs here.](#)

### Did you find this guide helpful?

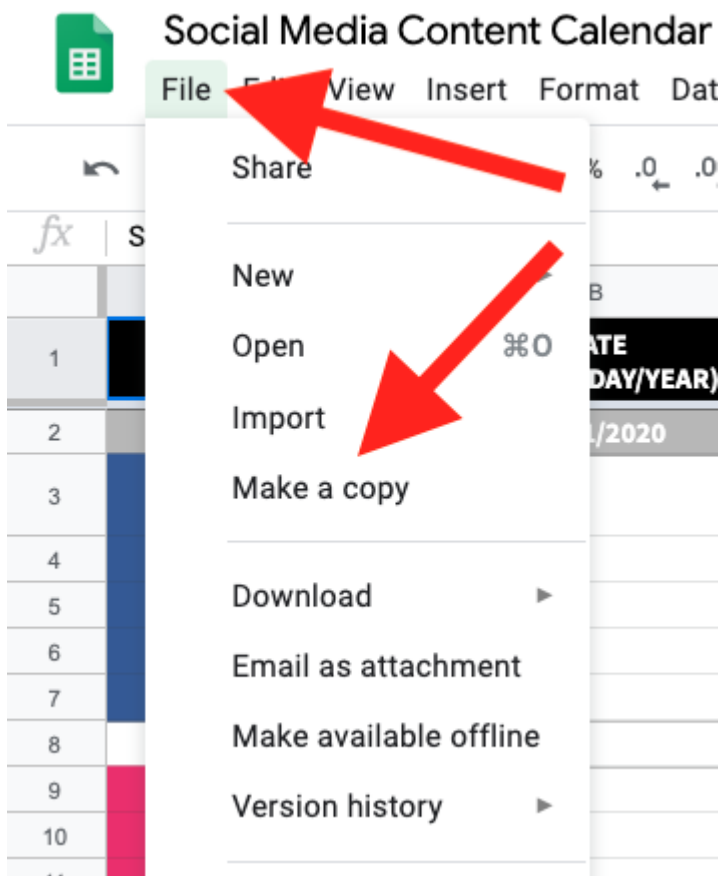
Tell us whether we should praise our writers or shout at them. Either way, we appreciate your honest feedback. [Take our 4-minute survey here.](#)

**Appendix 2**  
**Sample Social Media Calendar**

Plan, create, and manage all your :  
Sign up for Hootsuite and save ti  
[👉 Start Yo](#)

To use the template, **make a copy** of it or **download it** as an Excel spreadsheet.

Read the full article: [How to Create a Social Media Content](#)



**social media content from a single dashboard.  
me with the interactive publishing calendar.  
our Free 30-Day Trial 🖱️**

[Calendar](#)



SOCIAL NETWORK	DATE (MONTH/DAY/YEAR)	TIME (EST)	CONTENT TYPE
WEEK 1: MONDAY		06/01/2020	
FACEBOOK		7:00 AM	NEW BLOG POST CURATED CONTENT VOLUNTEER SPOTLIGHT LIVE VIDEO PROMOTION
INSTAGRAM			STORY ORIGINAL IMAGE CURATED CONTENT
LINKEDIN			NEW BLOG POST VOLUNTEER OPPORTUNITY POS PROJECT UPDATE POST CURATED CONTENT VIDEO
WEEK 1: TUESDAY		05/01/2020	
FACEBOOK			
INSTAGRAM			
LINKEDIN			
WEEK 1: WEDNESDAY		01/09/2020	
FACEBOOK			
INSTAGRAM			





**LINKEDIN**

**WEEK 1: THURSDAY** 01/10/2020

**FACEBOOK**

**INSTAGRAM**

**LINKEDIN**

**WEEK 1: FRIDAY** 01/11/2020

**FACEBOOK**

**INSTAGRAM**

**LINKEDIN**



**TOPIC**

**SOCIAL COPY (to be filled in 3 days before publishing)**

Silent Video

be

IT







**LINK**

**NOTES (e.g., specific images, etc.)**

<https://blog.hootsuite.com/silent-video/>

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[Redacted]

[Redacted]

# **Appendix 3**

## **Sample Cost Benefit Analysis**

	Utility Customer	Utility	Federal Govt.	State Govt.	New Cons. Worker	Displaced Cons. Worker	New Op. Worker	Displaced Op. Worker	Total
<b>Benefits</b>									
Value of Kerosene Displaced	30								30
Value of qualitative improvement in electric service and increased electricity consumption (utility customer)	40								40
<b>Transfers</b>									
Aggregate	-68	41	2	6	4	5	5	5	0
<b>Costs</b>									
Capital Cost Grid Expansion		-15							-15
Time-Loss from newly-employed construction workers					-2				-2
Productivity loss from displaced construction workers						-5			-5
Land cost for utility right-of-way				-5					-5
Non-labor operational cost		-25							-25
Time loss for new operational workers							-3		-3
Productivity loss from displaced operational workers								-5	-5
<b>Total</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>10</b>

# **Appendix 4**

## **SWOT Analysis**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Existing partnerships <ul style="list-style-type: none"> <li>○ CER has maintained successful partnerships locally and abroad, such as their partnerships with churches and the communities in Nepal.</li> </ul> </li> <li>• On-the-ground work <ul style="list-style-type: none"> <li>○ CER's projects show that they are focused on bringing long-lasting relief. This can be seen in their nanny-goat project, water infrastructure projects, and their ongoing efforts in Lake Charles. All of these projects are designed to bring sustainable relief.</li> </ul> </li> <li>• Project execution and follow-up <ul style="list-style-type: none"> <li>○ CER conducts ongoing trips to Nepal to follow-up on their projects and has successfully helped families there become more self-sustaining.</li> </ul> </li> <li>• Passionate members <ul style="list-style-type: none"> <li>○ Everyone we spoke with was very enthusiastic about CER's work, including Bill Richardson and CER's board members. They also expressed great satisfaction in helping those in need.</li> </ul> </li> <li>• Experience executing successful projects. <ul style="list-style-type: none"> <li>○ CER's experience presents a great opportunity for them to expand on projects and to build partnerships.</li> </ul> </li> <li>• Ability to develop connections <ul style="list-style-type: none"> <li>○ The members of CER, Bill and the board, are very personable and have displayed the ability to make formal and informal connections with the people they interact with. This will be a great strength to utilize when seeking to build partnerships.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Lack of strong identity <ul style="list-style-type: none"> <li>○ CER is still a young organization and does not currently have a strong identity. Their request for us to help them in this area shows that this can be overcome.</li> </ul> </li> <li>• Lack of mission or vision statement <ul style="list-style-type: none"> <li>○ We were unable to find a mission or vision statement on CER's webpage, or in any of the materials provided to us.</li> </ul> </li> <li>• Long-term budgeting <ul style="list-style-type: none"> <li>○ Budgeting records were not found for any of CER's projects. Their organization's budget can be improved with better organization and planning.</li> </ul> </li> <li>• No project evaluation methods <ul style="list-style-type: none"> <li>○ We did not find project evaluations in the materials provided by CER, and Bill Richardson expressed in interviews that they do not have a quantifiable method for evaluating organization progress regarding projects, volunteer recruitment, or budgeting.</li> </ul> </li> <li>• Limited volunteer resources <ul style="list-style-type: none"> <li>○ Bill Richardson expressed in interviews that he wanted to improve the resources available to volunteers. Volunteers also currently pay their own way on trips.</li> </ul> </li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Social media influence               <ul style="list-style-type: none"> <li>○ CER already has a Facebook page, but their limited activity presents an opportunity to expand their presence on social media. This will improve awareness of the organization and can be utilized in volunteer recruitment efforts.</li> </ul> </li> <li>• Local partnerships               <ul style="list-style-type: none"> <li>○ CER has developed partnerships domestically, which have offered service opportunities like their relief efforts in Lake Charles. They still have potential partners locally in Pennsylvania that can also be utilized, such as other churches or local schools. These organizations likely have a pool of members that are potential volunteers or donors for CER.</li> </ul> </li> <li>• Receptiveness of communities to partner               <ul style="list-style-type: none"> <li>○ CER's strengths in developing connections and their history of success in finishing projects offer an opportunity to reach out to other communities that could benefit from CER's services.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Compassion fatigue               <ul style="list-style-type: none"> <li>○ Bill Richardson expressed worry during interviews that compassion fatigue could be affecting their volunteers. Given the nature of their work, this should be a threat for CER to develop strategies to overcome.</li> </ul> </li> <li>• Economic fluctuations               <ul style="list-style-type: none"> <li>○ Many NGOs have suffered during economic recessions, and the COVID-19 pandemic could lead to this occurring while CER is still developing as a young organization.</li> </ul> </li> <li>• Lack of support from Nepal's government               <ul style="list-style-type: none"> <li>○ Bill Richardson discussed the limited support from Nepal's government in interviews and hopes to find ways to overcome this in order to serve Nepal communities.</li> </ul> </li> <li>• Competition with other NGOs               <ul style="list-style-type: none"> <li>○ Volunteers could be more attracted to NGOs that can offer better resources than CER, such as financial support during international trips.</li> <li>○ More established NGOs will be in a better position to survive economic recessions, which could lead to them being able to offer services when CER cannot. This would lead to missed service opportunities and potential opportunities to build partnerships during relief efforts.</li> </ul> </li> </ul>