



COMMUNITY ENGAGEMENT KIT

TRUE ENGAGEMENT

Strengthening client and employee relationships
through community engagement



Provided by Advisors Excel and MattyNeu



DO WELL BY DOING GOOD

Like many of you, Advisors Excel has a history of helping its community through charitable contributions and support for community organizations. But it wasn't until 2015 that we began deploying our most valuable resource to address community needs – our hundreds of employees. That's when we began to see real and lasting benefits, not only for the community but for our business.

As our staff members began spending up to four hours each quarter giving back to the community through service to one of several organizations, we saw marked increases in employee satisfaction and engagement, a strengthening of our corporate culture and even higher levels of employee retention. There may be no single initiative we've undertaken that has reaped as many benefits as our community engagement efforts.

That's why we were particularly excited to hear how many of you want to start a formal community engagement program in your practice, both as a way to give back to your community and as a strategic business initiative.

If your experience is anything like ours, you'll find that a community engagement program not only helps to meet real community needs, it also builds trust in your community and in your business. We also believe your community engagement efforts can strengthen your client relationships when you involve clients (and even prospects) in your volunteer efforts.

In the pages that follow, you'll find detailed descriptions of three of AE's most successful community engagement activities: taking kids shopping for the holidays, buying school supplies and volunteering at a local food/clothing pantry. We've tried to present these programs so you can easily adapt them to your business and your community. Or perhaps you'll simply use the ideas to initiate a completely new program in your community!

We hope you find this kit useful as you explore ways you can make an even greater impact in your area. We also hope you consider inviting clients and prospects to join you in your charitable endeavors. You may learn you're able to form even deeper relationships with those you serve – both inside your firm and out in the community.

We can't wait to hear what you do!

Cody & David



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COMMUNITY ENGAGEMENT OPPORTUNITY #1:

HOLIDAY SHOPPING WITH THOSE IN NEED

The holidays are a great time to brighten the lives of people in need – low-income families, children at risk, lonely senior citizens, disabled veterans, homeless families and individuals, etc. A charitable shopping event embodies the true spirit of the holiday season while also addressing actual needs in your community.

Many charitable organizations participate in holiday toy drives or “adopt-a-family” activities. You and your team could volunteer to help gather donations as a group, set up the “Christmas store” over a weekend or help adoptees shop for their gifts as a group. Contact your local Salvation Army, United Way, Toys for Tots, shelter or similar organization to learn how to get involved.

Another idea is to set up your own group-shopping event over the holidays. For example, every December, Advisors Excel employees go shopping at Kohl’s with approximately 120 of the most at-risk, in-need students from the largest school district in our community. Two employees help each child to shop for items on the youngster’s wish list. For many of these kids, this shopping trip may be their only Christmas.

AE budgets \$150 per student, and Kohl’s gives us a 30% discount on select name-brand items like Nike, Levi or Uggs. We worked with the local store manager to set up a purchase order (PO) account with Kohl’s so we can charge all purchases to this account. AE then pays the full bill at the end of the program. (For another shopping idea, see the sidebar on p. 08.)

We understand that the scale at which AE is able to operate this holiday shopping program may not match the scale that will be possible through your business. What we hope to outline are the steps you can take to create a similar program that works for you. Following are the steps to help develop a holiday shopping event in your area.



PRE-EVENT STEPS

3 to 6 months before event

1) Develop a budget.

How many people will you be able to shop for over the holidays, based on your budget? The number of people you can “adopt” may impact your decision on which organization to help.

For instance, if you decide that you won’t have the resources to assist an entire school, are there grade levels or classes you would target instead? Or perhaps you would want to work with a small senior center. There may also be an organization in your community that’s already working with the target population you hope to serve. Could you partner with them?

Next, decide how you will pay for the shopping. To ensure the activity is tax-deductible, consider one of these options:

- Set up a special project fund through a community foundation and pay the participating store directly based on the purchase order (PO) invoices received.
- Work with a school foundation that would pay for the purchases. At the end of the event, your firm would reimburse the school foundation directly.
- Work with a 501(c)3, not-for-profit organization to take the people they serve shopping. The charitable organization would pay for the purchases, and your firm would then reimburse the organization.

TIP: Every type of foundation is different and will determine its own payment process. Advisors Excel does not issue tax advice; please discuss your volunteer activity with a trusted tax advisor before launching any charitable program.

2) Identify the recipients.

Here are some groups or populations you may want to help with your shopping initiative:

- Students from local schools
- People with special needs
- Children in foster care
- Homeless or other at-risk individuals
- Seniors in assisted-living facilities

3) Choose an organization.

As you consider which population you’d like to benefit from your shopping efforts, you’ll want to contact an organization that’s already working with that population (for example, a school, homeless shelter or senior center). The organization can help identify any challenges or obstacles that may exist and work out the best way to organize your shopping activity.

4) Contact local store(s).

Think about the kinds of stores that could offer a good shopping experience – ideally, one with multiple departments for clothing, shoes, housewares and toys. Also, consider the store’s price point, quality of goods, selection and so on. And if shoppers need to be bused in for the event, can the store’s location accommodate buses or vans? You may need to reach out to several stores before determining the best partner for your event. Look for the partner that offers you the greatest flexibility.

Once you’ve decided on a partner store, you’ll need to work with them to determine a few things:

- Preferred payment method, such as:
 - Purchase order
 - Accounts payable
 - Check
 - Daily credit card transaction
- The best way to check shoppers out.
 - Depending on the number of shoppers and the length of your shopping event, you may want to ask the store if they would consider opening a dedicated cash register. For AE’s holiday shopping, Kohl’s dedicates one or two cash registers a day and keeps a running total of purchases. Instead of having to check out each shopper individually, AE completes one or two large transactions per day.
 - Determine how the store wants to handle each transaction.

4 to 6 weeks before event

1) Recruit volunteers.

The number of volunteers you have and your budget will determine how many shoppers you can accommodate.

Start by determining how many volunteers will accompany each shopper. If you're shopping with young children or with people who have mobility issues that may make moving through the store difficult, it's a good idea to assign two volunteers to each shopper. Advisors Excel schedules two volunteers to accompany each child shopper. Most of the students we shop with are young, so an extra pair of eyes and hands come in handy!

Be sure to give potential volunteers a thorough description of the volunteer activity and other key details, including:

- A brief, detailed description of the charitable organization and the services it provides
- A thorough description of the tasks that volunteers might complete during the activity
- An explanation of what to wear when volunteering (do you have logoed T-shirts you want your volunteers to wear, should they be in comfortable shoes, are jeans appropriate, etc.)
- A note that volunteers should be free from contagious illness when volunteering (runny nose, cold, the flu, strep throat, etc.)
- The physical address of the organization, where to park, who to report to on arrival, etc.
- Any directions, waivers or other helpful information

Invite clients to volunteer!

Will you and your team recruit some of your clients to volunteer with you during the shopping event? Doing so can give you a different kind of interaction while uniting around a shared cause. You may even want to encourage trusted clients to invite their children or grandchildren to volunteer alongside them – a great way to connect with younger generations and show your community involvement.

TIP: Take advantage of online resources to help organize volunteers. For instance, SignUpGenius.com offers a free event-planning tool that makes it easy to invite participants, coordinate your event and sign up volunteers. Plus, the system can send email and text reminders as well as follow-up communication. Another user-friendly option for signing up volunteers is Eventbrite.com.

To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

3 weeks before event

1) Schedule shoppers.

Once you know how many volunteers you have (and your ratio of volunteers to shoppers), tell the school or charitable organization how many shopping slots you have.

Other scheduling considerations to think about:

- During which hours is your partner-store best equipped to accommodate your shoppers? For instance, AE has found that mornings are often a good time to shop during the holidays. The floor is less crowded, and the merchandise tends to be restocked and better organized.
- When will it be easiest for the school or charitable organization to get recipients to the store? For example, AE works with at-risk schoolchildren, so scheduling shopping appointments during the day makes it possible for the students to use the school's buses or other transportation.
- Consider working closely with the charitable organization or school to schedule shoppers for specific dates and times. (Remember, it's more fun to shop as a group!) A set schedule also will help you stay organized for billing purposes and make it easier to schedule volunteers. AE's volunteers typically shop with students during the first two weeks of December: on Monday, Wednesday and Friday from 9 to 11 a.m., and on Tuesday and Thursday from 1 to 3 p.m.

2) Consider using a "wish list."

Having shoppers fill out a shopping wish list a few weeks before their shopping appointment is a smart move. It helps the recipients focus on what's most important to them and makes the shopping experience much smoother.

For Advisors Excel's shopping event, the schools help students fill out their wish lists in advance. We also ask for each shopper's clothing and shoe sizes, because most kids don't know them. Learning such information ahead of time keeps volunteers from having awkward conversations about sizes with the young shoppers.

What's more, some AE volunteers use the wish lists to buy additional gifts for their shopper.

Here's what AE's wish list looks like:



TIP: For a wish list template you can use, see p. 21.

1 week before event

1) Remind volunteers.

Send a postcard and an email (or two) to all volunteers at least a week before the event, reminding them of the shopping date, time and location. We also suggest sending it a day before the event.

TIP: Take advantage of the automatic reminders and alerts that SignUpGenius.com and Eventbrite.com offer through their online programs. To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

2) Create a "cheat sheet."

Make a list of simple instructions for volunteers to refer to during the shopping event, including:

- How much money they can spend on each shopper
- How much time they have for each shopping appointment
- Where to go in the store for checkout
- How to complete the shopping appointment – perhaps saying something like, "I've really enjoyed shopping with you today, Johnny. I hope you enjoy the holidays!"

DAY-OF-EVENT STEPS

1) Go shopping!

It's a good idea to ask volunteers to arrive at the store at least 15 minutes before their shopping appointment. (Trust us: It's no fun making an excited child wait for their volunteer to show up!)

Greet each volunteer, check them in and then hand them their shopping instructions (see the "cheat sheet" ideas under No. 2 in the previous column).

When your shoppers arrive, check them in, one at a time, and match them with their volunteer(s). Make the appropriate introductions and then send off the duo (or trio) to shop!

TIP: Consider a fun way to make your team of volunteers stand out during your event. Each volunteer could wear a Santa hat, for instance, or a silly flashing necklace – anything that helps identify who you are and what you're about.

- For Advisors Excel's volunteer events, we provide all staff with an AE "Community Engagement" T-shirt (example shown below) and ask them to wear it when volunteering with AE. This simple step has helped us to publicize our volunteer efforts in the community – and build our company's brand!



For information on ordering branded T-shirts for your firm, see p. 20.

2) Check out.

Ensure all your volunteers understand how they'll need to check out at the end of their shopping experience. You may want to have a member of your firm nearby to help with any questions that may come up, including what to do if any of your volunteer shoppers go over the designated spending limit.

3) Consider extras.

You may want to come up with additional ways to make your shopping event special. For instance, if friends, family or clients would like to support your event but aren't able to help shop, you could ask them to bake cookies, decorate ornaments or make a small donation. Then, share these extras with your shoppers at the end of your event.

AE has found that many of our young shoppers don't have even basic personal care products at home. So, we send each child home with a simple hygiene kit after they check out. This kit includes:

- Shampoo and conditioner
- A toothbrush and toothpaste
- Hairbrush or comb
- Deodorant

POST-EVENT STEPS

1 to 2 days after event

1) Thank volunteers.

Let your volunteers know how much you appreciated their participation with a thank you note, phone call or email. It's also the perfect time to tell clients how grateful you are for their business, generosity and friendship.

What's more, take the time to ask volunteers about their experience of the event – what went well, what could be better, would they like to volunteer again and so on.

TIP: You can use SignUpGenius or EventBrite to send an email after your event, asking volunteers to rate their experience on a scale of 1 to 10 or to request specific feedback.

For a sample post-event email, see page 23. For instructions on how to use SignUpGenius, see page 22.

4 to 7 days after event

1) Hold a debriefing.

Gather your team or trusted volunteers to do a "Start, Stop, Continue" analysis on your community engagement program, noting the specific things you want to:

- Start doing to improve your event
- Stop doing to make your event more effective
- Continue doing, because you learned those ideas really worked!

Then use your analysis to fine-tune future volunteer opportunities.

TIP: For ideas on how to share the good news about your volunteer program, see page 25.

Another Way to Give Back: An Evening of Shopping

Advisors Excel knows of one foundation that handled its charitable shopping experience in a different way. The foundation invited business contacts and their friends and family to take students shopping as a group activity one evening during the holidays.

The donors "sponsored" each young shopper with a \$150 contribution. At the end of the evening, the foundation paid the total shopping bill from those donations.

SCHOOL SUPPLY SHOPPING

Make it easier for at-risk kids to start the school year off right by purchasing shiny, new school supplies. Or consider donating some basic necessities to a school or classroom in a low-income neighborhood, such as desk chairs, books, copy paper, facial tissue, etc.

Each year, Advisors Excel provides \$400 worth of school supplies to each elementary and middle school in our county. We have a main point of contact in the school district and at each school. These representatives create a wish list of needed school supplies and help us arrange delivery of the supplies to each school.

To pay for these items, AE purchases \$400 Visa gift cards and distributes them to small teams of AE volunteers. Each team shops for the school supplies together and then delivers them to the school (when classes are in session). It's a great opportunity for AE employees to interact with some of the students and school staff in our area.

Following are the steps to help set up a school-supply shopping program.

PRE-EVENT STEPS

3 to 6 months before event

1) Develop a budget.

Your budget will determine whether you're able to buy school supplies for a single classroom, entire school or local school district. Other ideas include purchasing something that each classroom needs (such as boxes of copy paper, new desk chairs for teachers, snacks or other student incentives). Or, if there's another organization in your community that has a school-supply drive you could participate in, find out what their monetary needs are.

2) Choose an organization.

Whether you collaborate with a local not-for-profit or school that already has an established school-supply drive or will be starting from scratch, reach out to a teacher, school principal or superintendent and explain that your firm would like to donate school supplies or other items.

- Ask the official for the name of the appropriate point of contact for a discussion of needed school supplies, delivery of the donations, etc.
- Ask that point of contact to supply you with a list of needed items to ensure your donations are put to good use.

3) Decide your shopping format.

The next step is to figure out how to best structure your shopping event. For instance, if your firm is planning to adopt a classroom, you may want to go shopping together as a group.

If you're adopting multiple classrooms – and have enough volunteers – you may want to go in separate small groups, each with a list of items to purchase. If that's the case, set a date for when each group needs to complete their shopping.

4) Determine a delivery plan.

Think through how you will deliver the school supplies or other items. Do you want the same group of volunteers who purchased the supplies to deliver them to the school? If so, and especially if you're including clients in your event, you may want to do your shopping and delivery the same day.

Or, you could do your shopping one day and have office staff make the delivery on a separate day. Another option is to involve one set of volunteers in the shopping and another group of volunteers in the delivery – which might work especially well for volunteers who tire easily.

5) Choose a payment option.

How will you pay for the school supplies? To ensure the activity is tax-deductible, consider these options:

- Set up a special project fund through a community foundation. If you'll be using gift cards to complete your shopping, request an invoice for the quantity of gift cards you will purchase from a bank or store, then pay the community foundation using special project funds.
- Work directly with the school's foundation to pay for the purchases. At the end of the event, your firm would reimburse the school foundation directly.
- Work with a 501(c)3, not-for-profit organization. The charitable organization would pay for the school supplies, and your firm would then reimburse the organization.

TIP: Every type of foundation is different and will determine its own payment process. Advisors Excel does not issue tax advice; please discuss your volunteer activity with a trusted tax advisor before launching any charitable program.

4 to 5 weeks before event

1) Recruit volunteers.

Your budget and the number of volunteers you have will determine how many school-supply shoppers you need. If you'll have multiple shopping groups, encourage volunteers to shop together at one store during, say, a two- or three-hour time period. It's more fun to shop as a group – it builds camaraderie and a shared sense of mission. (Don't forget that if you have separate shopping groups, you'll need several "slots" with specific shopping dates and times that volunteers can sign up for.)

Also, be sure to give potential volunteers a thorough description of the volunteer activity and other key details, including:

- A brief, detailed description of the charitable organization and the services it provides
- A thorough description of the tasks that volunteers might complete during the activity
- An explanation of what to wear when volunteering (do you have logoed T-shirts you want your volunteers to wear, should they be in comfortable shoes, are jeans appropriate, etc.)
- A note that volunteers should be free from contagious illness when volunteering (runny nose, cold, the flu, strep throat, etc.)
- The physical address of the organization, where to park, who to report to on arrival, etc.
- Any directions, waivers or other helpful information

Involvement your clients!

Consider recruiting some of your clients to help shop, too. You may even want to encourage trusted clients to invite their children or grandchildren to shop with them – a great way to connect with younger generations and show your community involvement.

TIP: Take advantage of online resources to help organize your volunteers. For instance, SignUpGenius.com offers a free event-planning tool that makes it easy to invite participants, coordinate your event and sign up volunteers. Plus, the system can send email and text reminders as well as follow-up communication. (Another user-friendly option for signing up volunteers is Eventbrite.com.)

To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

1 week before event

1) Remind volunteers.

Send a postcard and an email (or two) to all volunteers at least a week before the event, reminding them of the shopping date, time and location. We also suggest sending it a day before the event.

TIP: Take advantage of the automatic reminders and alerts that SignUpGenius.com and Eventbrite.com offer through their online programs. To learn how to

use SignUpGenius to schedule volunteers for your events, see p. 22.

DAY-OF-EVENT STEPS

1) Go shopping!

It's fun to shop for school supplies as a team and then deliver the supplies to the school or other organization. (More people also makes it easier to unload a carful of supplies!)

AE employees divide into teams of four to six people who shop for the requested school supplies together and deliver them to the school on the same day. (You may find that it works better to shop one day and then deliver the supplies a day or so later.)

TIP: Consider a fun way to make your team of volunteers stand out. Each volunteer could wear a T-shirt or funny hat, button or necklace – anything that helps identify who you are and where you're from.

- AE provides all staff with an AE "Community Engagement" T-shirt (example shown below) and asks them to wear it when volunteering with AE. This simple step has helped us to publicize our volunteer efforts in the community – and build our company's brand!



For information on ordering branded T-shirts for your firm, see p. 20.

POST-EVENT STEPS

Up to 1 week after event

1) Deliver supplies.

Coordinate with your point person to deliver your supplies to the school when it's convenient for them.

You may find that it works better to shop for school supplies on one day and then deliver the purchases at a later date. If that's the case, consider recruiting one set of volunteers to help shop and another set of volunteers to help with the delivery.

At Advisors Excel, we've found that delivering the supplies when classes are in session is a great way for our employees to connect with local students, teachers and administrators and get a feel for other potential needs. It's also a great way to introduce our staff to the idea of mentoring students through Big Brothers Big Sisters or other mentoring programs.

1 to 2 days after event

1) Thank volunteers.

Let your volunteers know how much you appreciated their participation with a thank you note, phone call or email. It's also the perfect time to tell clients how grateful you are for their business, generosity and friendship.

What's more, take the time to ask your volunteers about their experience of the event – what went well, what could be better, would they like to volunteer again and so on.

TIP: You can use SignUpGenius or EventBrite to send an email after your event, asking volunteers to rate their experience on a scale of 1 to 10 or to request specific feedback.

For a sample post-event email, see page 23. For instructions on how to use SignUpGenius, see page 22.

4 to 7 days after event

1) Hold a debriefing.

Gather your team or trusted volunteers to do a "Start, Stop, Continue" analysis on your community engagement program, noting the specific things you want to:

- Start doing to improve your event
- Stop doing to make your event more effective
- Continue doing, because you learned those ideas really worked!

Then use your analysis to fine-tune future volunteer opportunities.

TIP: For ideas on how to share the good news about your volunteer program, see page 25.

“Advisors Excel comes through for us each year by donating playground balls for our PE classes and recess. You can see the smiles on our students’ faces when they see the new footballs, soccer balls and basketballs.”

Scott Dial, Principal, Tecumseh South Elementary School

COMMUNITY ENGAGEMENT OPPORTUNITY #3:

VOLUNTEERING AT A FOOD/CLOTHING PANTRY

You may want your community engagement program to reflect a “boots on the ground” philosophy, where you roll up your sleeves and do tangible tasks that a local charitable organization or group needs help with.

At Advisors Excel, teams of employees prepare and serve lunches about once a week at Let’s Help Inc., a Topeka-based not-for-profit committed to helping people achieve self-sufficiency and break the cycle of poverty. The organization also runs a food pantry, clothing bank, and education and employment programs for adults and older Kansans.

What’s more, AE employees regularly pack bags of nonperishable food for the Project Topeka Community Food Drive’s “Fun Food Fridays” program. This program, in two local elementary schools, sends kids home with care packages on Fridays to ensure they have nutritious food options over the weekend.

On the following pages, you’ll find the steps to start your own volunteer initiative at a food/clothing pantry.



PRE-EVENT STEPS

1 to 2 months before event

1) Select an organization.

Look for an organization that will give you a chance to actually work with people in need or provide a service that directly supports such populations. You will want to talk with the organization well in advance to learn what their most pressing needs are and how you and your volunteers can best assist them in their mission.

You may want to start by volunteering at an established food or clothing pantry in your area. If you aren't familiar with such places, consider searching the internet with these phrases:

- "Food pantry near me"
- "Food bank near me"
- "Clothing pantry near me"
- "Clothing organizations near me"
- "Charitable clothing near me"

On the other hand, we've learned that the following phrases are unlikely to generate helpful results:

- "Clothing bank near me" (tends to generate financial institutions)
- "Free clothing near me" (often lists retail stores)
- "Gently used clothing near me" (often produces lists of consignment stores, not charitable organizations)

Many reputable organizations where AE is located are categorized as a charity, nonprofit, social services organization or donation center.

2) Contact the organization.

Learn more about the organization, who they serve and what their volunteer needs are. For example, does the organization's website include information for potential volunteers? Or, if the website lists the name of the volunteer coordinator or manager, contact this person (preferably via phone) and ask about volunteer opportunities. For instance, could volunteers:

- Sort clothing donations?
- Prepare or serve a meal?
- Distribute fresh produce or canned goods?
- Paint the building?

3) Decide if the opportunity is a good fit.

Confirm that the organization's available volunteer opportunities are things you and your volunteers are willing and able to do. Some considerations:

- Do you have staff members who are pregnant or have had recent back surgery?
- Will volunteers be required to lift items that weigh over 10 pounds?
- Do you need to wear "paint clothes" that you don't mind getting dirty?
- Does the organization expect you to work indoors or outdoors?

Also, be specific about how many volunteers you will have and how often you plan to volunteer. Are you looking for a two-hour shift each Monday during the workday for two staff members? Or one Saturday morning per month for your whole office? This clarity will ensure that both you and the organization know what to expect up front.

Other practical considerations:

- Is the organization conveniently located for you and your staff?
- Is free parking available, or will you need to pay for parking?
- Will your volunteers be expected to transport items in their own vehicles from one location to another?

1 month before event

1) Recruit volunteers.

Find out how many volunteers your partner-organization can accommodate at one time. Perhaps some of your volunteers could help prepare a meal, while others serve it or clean up afterward. Or perhaps the charitable organization needs someone to sort donations in their clothing bank while the meal is being served. Or maybe there's a need for volunteers to prepare hygiene kits from donated soap, shampoo and other toiletries.

Give potential volunteers a thorough description of your volunteer activity and other key details, including:

- A brief, detailed description of the charitable organization and the services it provides

- A thorough description of the tasks that volunteers might complete during the activity
- An explanation of what to wear when volunteering (do you have logoed T-shirts you want your volunteers to wear, what type of shoes are appropriate – open-toed, sandals, etc. – are jeans or shorts appropriate, should jewelry be avoided and so on)
- A note that volunteers should be free from contagious illness when volunteering (runny nose, cold, the flu, strep throat, etc.)
- The physical address of the organization, where to park, who to report to on arrival, etc.
- Any directions, waivers or other helpful information

To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

Invite clients to volunteer!

Your event might be a great way to see if certain clients would like to volunteer with you. Most people love the idea of giving back but may be unsure of how to get involved. Volunteering with a group is not only fun, it's also a good way to connect in a meaningful way.

TIP: Take advantage of online resources to help organize your volunteers. For instance, SignUpGenius.com offers a free event-planning tool that makes it easy to invite participants, coordinate your event and sign up volunteers. Plus, the system can send email and text reminders as well as follow-up communication. (Another user-friendly option for signing up volunteers is Eventbrite.com.)

To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

1 week before event

1) Remind volunteers.

Send a postcard and an email (or two) to all volunteers at least a week before the event, reminding them of the volunteer date, time and location. We also suggest sending it a day before the event.

Be sure to include information about:

- What activities the volunteers will be doing

- Where to park
- Where to enter the building and who to report to on arrival
- What to wear while volunteering

TIP: Consider a fun way to make your team of volunteers stand out during your event. Each volunteer could wear a T-shirt or funny hat, button or necklace – anything that helps identify who you are and what you're about.

- Advisors Excel provides all staff with an AE "Community Engagement" T-shirt (example shown below) and asks them to wear it when volunteering with AE. This simple step has helped us to publicize our volunteer efforts in the community – and build our company's brand!



For information on ordering branded T-shirts for your firm, see p. 20.

TIP: Take advantage of the automatic reminders and alerts that SignUpGenius.com or Eventbrite.com offer. To learn how to use SignUpGenius to schedule volunteers for your events, see p. 22.

DAY-OF-EVENT STEPS

1) Volunteer!

Ask volunteers to arrive at the food/clothing pantry at least 15 minutes before their assigned shift. When

volunteers arrive, check them in, one at a time, and let them know what they will be doing and where everyone will be.

At the end of the event, thank those who helped. Sometimes, a representative of the organization will be on hand to give your volunteer group a brief welcome, sharing information on who the organization helps and what their recipients are up against. In other cases, someone from the organization might be able to give you and your volunteers a brief tour of the facility and a recap of the services or programs they offer.

POST-EVENT STEPS

1 to 2 days after event

1) Thank volunteers.

Let your volunteers know how much you appreciated their participation with a thank you note, phone call or email. It's also the perfect time to tell your clients how grateful you are for their business, generosity and friendship.

What's more, take the time to ask your volunteers about their experience of the event – what went well, what could be better, would they like to volunteer again and so on.

TIP: You can use SignUpGenius or EventBrite to send an email after your event, asking volunteers to rate their experience on a scale of 1 to 10 or to request specific feedback.

For a sample post-event email, see page 23. For instructions on how to use SignUpGenius, see page 22.

4 to 7 days after event

1) Hold a debriefing.

Gather your team or trusted volunteers to do a "Start, Stop, Continue" analysis on your community engagement program, noting the specific things you want to:

- Start doing to improve your event
- Stop doing to make your event more effective
- Continue doing, because you learned those ideas really worked!

Then use your analysis to fine-tune future volunteer opportunities.

TIP: For ideas on how to share the good news about your volunteer program, see page 25.

2) Contact the charitable organization.

Consider reaching out to the organization you volunteered at for their feedback. What worked well? What could have helped the organization even more? Would the organization like your group to volunteer again?

TIP: For ideas on how to share the good news about your volunteer program, see page 25.

“The Fun Food Fridays program would not exist without AE employees packing over 650 bags of food during the school year. The program has been a tremendous success and has helped eliminate the stigma of food assistance at two local schools.”

Dan McPherron, Treasurer, Project Topeka Community Food Drive

RESOURCES & TEMPLATES

In this section, we provide resources and templates to help you streamline and promote your community engagement program. Some of the materials can be downloaded; others feature a link to order custom materials on the AE Marketing Hub (www.aemarketinghub.com).

- Volunteer postcard invitation p. 18
- Volunteer email invitation p. 19
- T-shirts for volunteers p. 20
- Wish list template p. 21
- SignUpGenius.com instructions p. 22
- Volunteer feedback email p. 23
- Photo/video release p. 24
- Share what you're up to! p. 25
 - o Sample news releases
 - o Sample Facebook posts

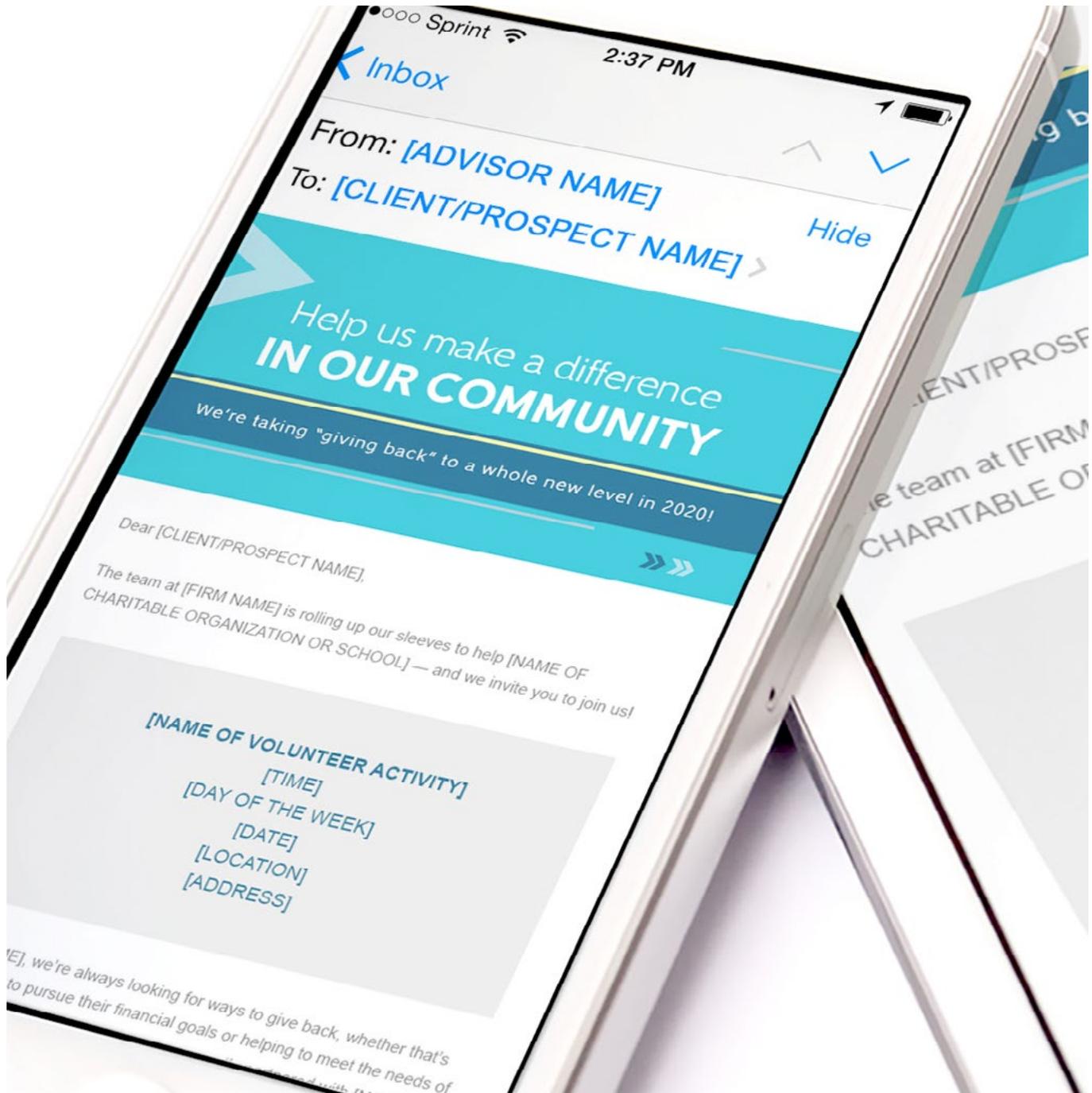
VOLUNTEER POSTCARD INVITATION



Use the postcard template we've created to invite clients and other community members to join you at your community engagement event.

[CLICK HERE to start your postcard invitation.](#)

VOLUNTEER EMAIL INVITATION



This email template can be customized to your specific volunteer activity, offering an easy way to reach out to potential volunteers.

[**CLICK HERE to open email template.***](#)

*Note: When the template opens, please Select All, then copy and paste into the body of a new email.

COMMUNITY ENGAGEMENT T-SHIRTS



AE supplies every employee with a special T-shirt to wear when volunteering. The back of the shirt features this quote: "You can't live a perfect day without doing something for someone who will never be able to repay you." – John Wooden

We have designed a similar T-shirt for your firm to use, showing your logo on the front.

[CLICK HERE to learn how to order your T-shirts.](#)

WISH LIST TEMPLATE

**Maybe Christmas, Perhaps,
Means A Little Bit More**

The season of giving is upon us, and we are ready to start the Season of Sharing Christmas wish list. Help us to know exactly what those gifts should be!

Name: _____ Grade: _____ Age: _____

My school: _____

Favorite Color: _____

Favorite Candy: _____

Favorite Activity: _____

Favorite Sport: _____

Favorite Book: _____

Favorite Fun Thing to Do: _____

Favorite Place to Eat: _____

Things I Want: _____

Stocking Stuffers I Love: _____

My Sizes
Shirt: _____ Pant: _____ Shoes: _____



If you're organizing a holiday shopping event, consider asking your shoppers to complete a wish list before their shopping appointment. The list helps shoppers focus on what's most important to them while they shop – and makes the volunteer experience easier on volunteers, too.

[**CLICK HERE to download a wish list \(PDF\).**](#)

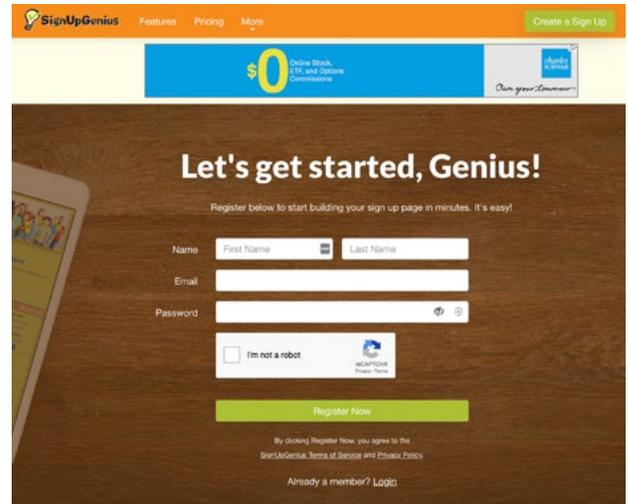
SIGNUPGENIUS.COM INSTRUCTIONS

To schedule employees for volunteer opportunities, AE uses a free online event-planning tool called SignUpGenius.com. It's an easy way to invite participants, coordinate your event and sign up volunteers. Plus, the system can send email and text reminders as well as follow-up communication.

Create your event

Here's how to create your event sign-up information in SignUpGenius.com:

- 1) Go to <https://www.signupgenius.com/register> and create an account.
- 2) Click the green button "Create a Sign Up." The program walks you through the initial steps to create your event.
- 3) Create "slots" for where you will input the dates, times and location of your event. This is the information your staff and volunteers will rely on when signing up for your event, so do make sure it's as accurate as possible.
- 4) Choose from a variety of settings, including custom design themes, or add a custom question for your volunteers.
- 5) Set automatic reminder emails or texts for your events.
- 6) Click "Save" at the bottom of the screen to make your signup shareable. You can now copy the link and distribute it via email or social media.
- 7) Every volunteer who signs up for your event must create a free SignUp Genius account. If you plan to invite clients or prospects to volunteer, you can ask them to call you and then enter their information into SignUpGenius for them. As the administrator, you will be able to access who has signed up for an event and edit the information as needed.

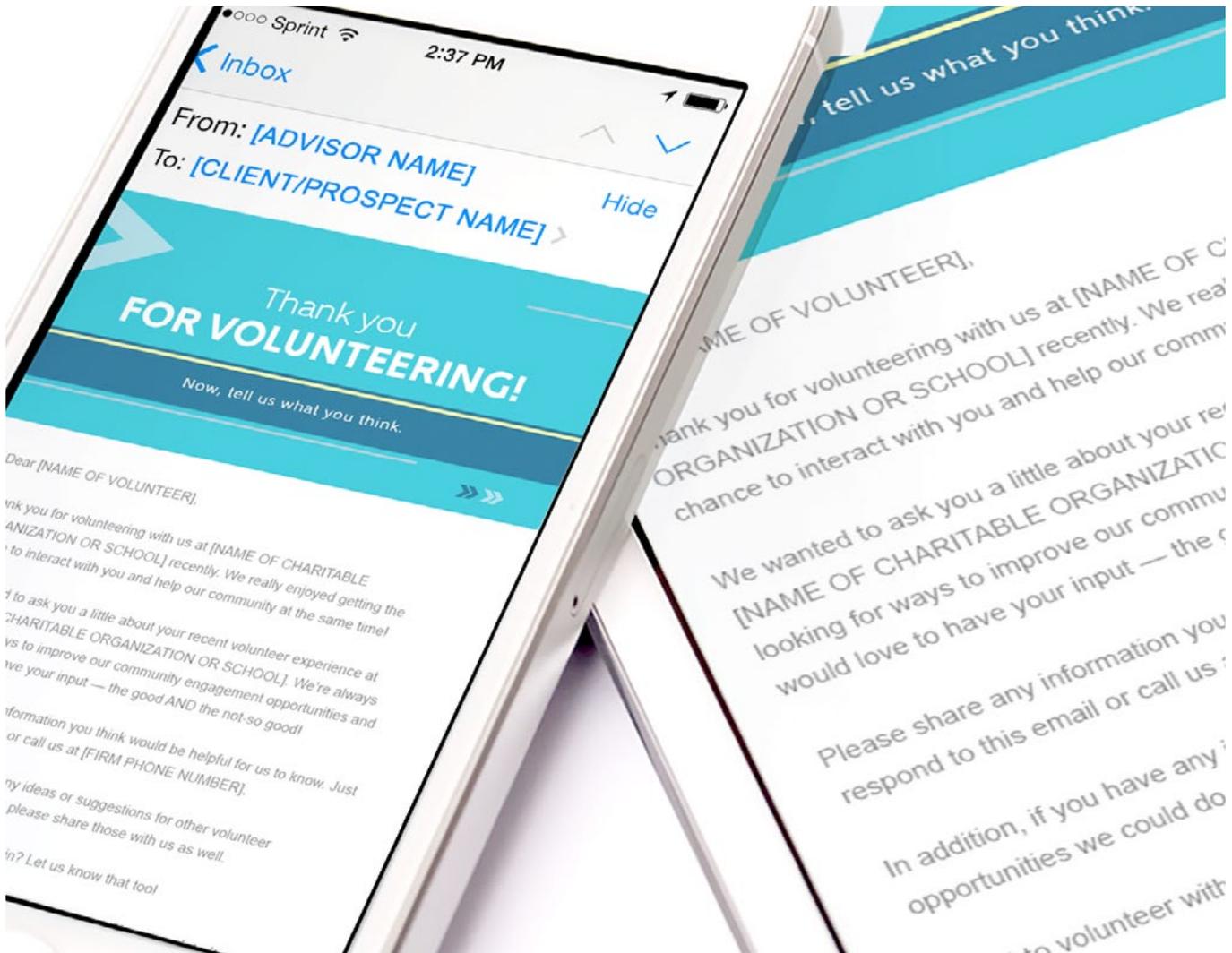


TIP: At Advisors Excel, we include the following information on every SignUpGenius activity:

- A brief, detailed description of the charitable organization and the services it provides.
- A thorough description of the tasks that volunteers might complete during the activity.
- An explanation of what to wear when volunteering (AE Charitable Crew T-shirt and jeans, or AE T-shirt and shorts in the summer). AE also notes that open-toed shoes, like flip-flops or sandals, are not allowed and that jewelry should be kept to a minimum.
- A note that volunteers should be free from contagious illness when volunteering (runny nose, cold, the flu, strep throat, etc.).
- The physical address of the organization, where to park, who to report to on arrival, etc.

You can also attach any directions, waivers or other helpful information by clicking on the "Related files" button.

VOLUNTEER FEEDBACK EMAIL



When your community engagement event is over, you can customize this email template we created to get feedback from volunteers on their experience – what they liked, what could be better and so on.

[**CLICK HERE to open email template.***](#)

*When the template opens, please Select All, then copy and paste into the body of a new email.

Another option: Use SignUpGenius to create a simple survey for volunteers after your event. Go to www.SignUpGenius.com to create a SignUp, then click Settings and select "Add a Custom Question."

PHOTO/VIDEO RELEASE TEMPLATE

VOLUNTEER APPEARANCE RELEASE FORM

I hereby authorize [FIRM NAME] and its parents, affiliates, subsidiaries, licensees, agents, representatives, officers, directors, employees, successors and/or assigns to photograph and/or film me and to use my likeness in any photograph, video and/or other digital media (collectively "footage") in any and all of its media and/or publications, including web-based, without payment or other compensation to me.

I understand and agree that all footage will become the property of [FIRM NAME], including the exclusive right, throughout the world, to use and to license others to use all or any portion of the footage. [FIRM NAME] is not obligated to use the footage.

I hereby irrevocably authorize [FIRM NAME] to edit, alter, copy, exhibit, publish or distribute the footage for any lawful purpose. In addition, I waive any right to inspect or approve the finished product wherein my likeness appears. Additionally, I waive any right to royalties or other compensation arising or related to the use of the footage.

I hereby hold harmless, release and forever discharge [FIRM NAME] from all claims, demands and causes of action which I, my heirs, representatives, executors, administrators or any other persons acting on my behalf or on behalf of my estate have or may have by reason of this authorization.

I HAVE READ, UNDERSTAND AND ACCEPT THE TERMS CONTAINED WITHIN THIS RELEASE. I AFFIRM THAT I AM AT LEAST 18 YEARS OF AGE, OR, IF I AM UNDER 18 YEARS OF AGE, I HAVE OBTAINED THE REQUIRED CONSENT OF MY PARENT/GUARDIAN AS EVIDENCED BY THEIR SIGNATURES BELOW.

Print Name: _____
Signature: _____
Date: ___/___/___

If under 18, the undersigned warrants and represents that they are the parent/legal guardian of the minor.

Print Name: _____
Parent Signature: _____
Date: ___/___/___

It's important to ask each volunteer to read and sign the photo/video release provided here or a similar version. Some people may not want their photo to be included in your firm's newsletter, on social media or in other publicity. Be mindful of any such scenarios and alert photographers/videographers as necessary.

NOTE: Most schools and nonprofit organizations have strict rules about identifying the children or adults they serve. Talk with the organization's volunteer coordinator before taking photos or videos of recipients.

[**CLICK HERE to download photo release \(Word document\).**](#)

SHARE WHAT YOU'RE UP TO!

Here are some simple things your firm can do to talk about how you're making a difference in your community – and encourage others to step up their volunteering and charitable giving:

- Send a news release about your volunteer activity, emphasizing the community impact. Talk with your contact at the charity or school. Get specifics on the impact of your volunteer efforts (How many meals are provided through your local food/clothing pantry each year? How many people are served by your local clothing pantry each year? How many students got school supplies they wouldn't have had otherwise?). Use this information in the news release about your volunteer program.
- Post photos of your event on social media. (Be sure to get permission from anyone shown in the photos beforehand.) Appoint a staff member or volunteer to take photos during your event – and have fun with it!
- Include photos of your event in your monthly newsletter. Clients will appreciate hearing about your charitable work, especially if the photos show clients volunteering.

The following pages feature news releases you can customize for each of the three community engagement opportunities featured in this kit. Sample Facebook posts from AE's community engagement program are shown on p. 27.

TIP: Review the section on photo/video releases on p. 24 to ensure best practices regarding confidentiality. Do not use client names in newsletters or social media posts.

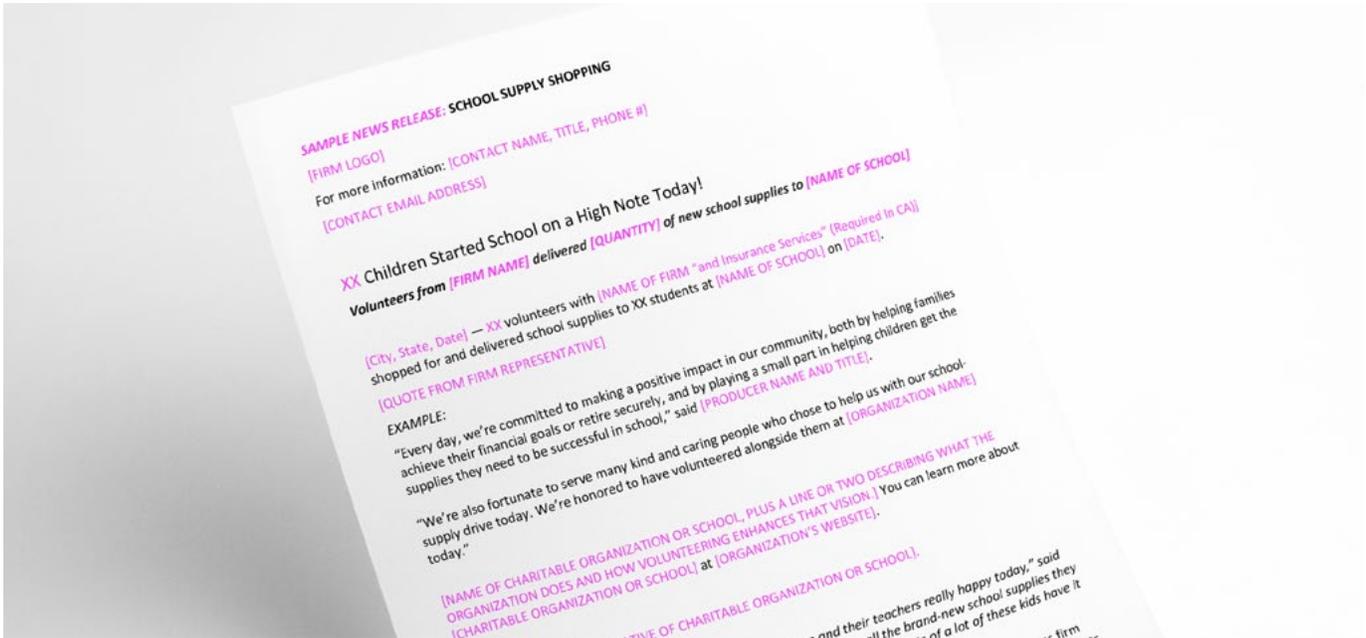
SAMPLE NEWS RELEASE: HOLIDAY SHOPPING EVENT



Use this news release template to share how your holiday shopping event brightened the lives of community members in need.

[**CLICK HERE to download release \(Word document\).**](#)

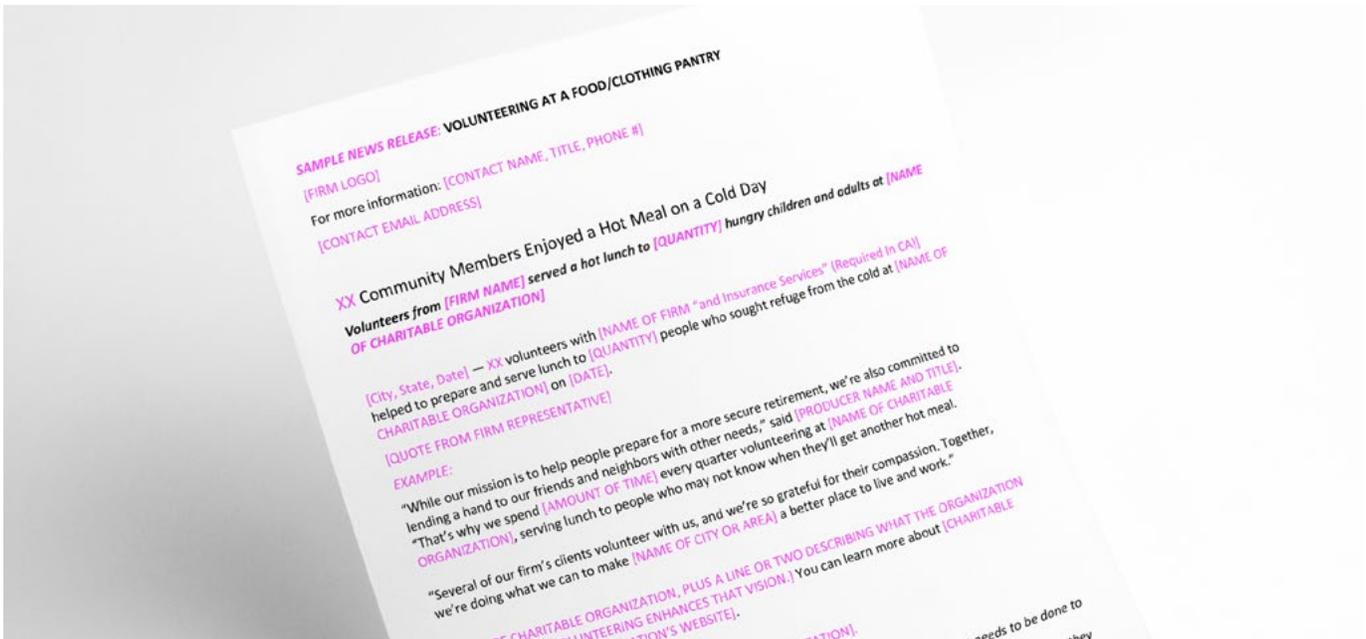
SAMPLE NEWS RELEASE: SCHOOL-SUPPLY SHOPPING EVENT



Use this news release template to talk about the impact of your school-supplies drive.

[CLICK HERE to download release \(Word document\).](#)

SAMPLE NEWS RELEASE: VOLUNTEERING AT FOOD/CLOTHING PANTRY



Use this news release template to share how your firm's volunteering supports a local clothing or food pantry.

[CLICK HERE to download release \(Word document\).](#)

SAMPLE FACEBOOK POSTS

For ideas on how to publicize your community engagement activities on social media, check out these posts from AE's Facebook page:

Advisors Excel
October 29, 2019 · 🌐

The absolute best event all year! <https://www.ksnt.com/.../advisors-excel-gives-winter-clothi.../...>



KSNT.COM
Advisors Excel gives winter clothing to hundreds of local students

👍❤️ 202 2 Comments 38 Shares

👍 Like 💬 Comment ➦ Share

Advisors Excel
August 15, 2019 · 🌐

It's back-to-school time and AE team members are out and about delivering schools supplies to local elementary schools. Today, we delivered items for the new sensory room at Quincy and earbuds for Meadows. We hope all the students have a fantastic school year.

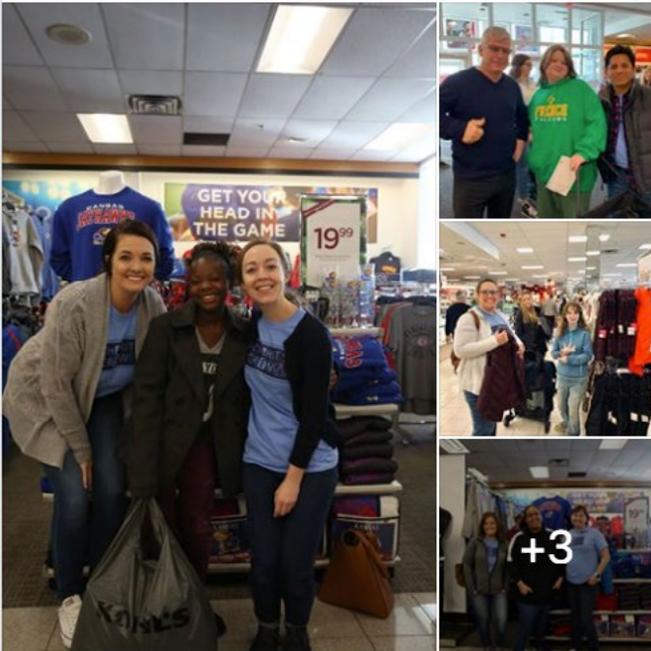


👍❤️ 174 3 Comments 7 Shares

👍 Like 💬 Comment ➦ Share

Advisors Excel is with Jen VandeVelde and Kim Sixkiller.
December 6, 2019 · 🌐

There's no better way to celebrate the season than taking deserving kids Christmas shopping. #SeasonofSharing #WeAreAdvisorsExcel



👍❤️ 257 1 Comment 11 Shares

👍 Like 💬 Comment ➦ Share

Advisors Excel
April 12, 2019 · 🌐

So far in 2019, 544 AE team members have volunteered 1,632 hours for 16 different organizations in the community. #AECares #NationalVolunteerWeek



👍❤️ 90 4 Comments 9 Shares

👍 Like 💬 Comment ➦ Share



My name is Matt Neuman. I'm a lifelong Kansan and the son of two recent retirees. My wife, Alice, worked as a teacher for many years before deciding to stay at home to raise our family. Our greatest joys are our three sons, Noah, Evan and Theo.

I've been fortunate enough to be with Advisors Excel since its launch in 2005. As Vice President of Advisor Development, I've been blessed to build an incredible team of eight professionals, with over 100 years of combined industry experience, to serve, coach and empower the financial professionals we work with.

Being an entrepreneur is a source of pride — and I'm incredibly proud of the team around me. Advisors Excel has always been a testament to what's possible when driven people come together to share knowledge and get things done. I'm not alone in saying that I believe the owners here at Advisors Excel have built something pretty special.

However, when you look across the financial industry these days, IMOs and advisors sometimes get a bad reputation. Many financial advisors no longer get the results they expect from their partners, coaches and leaders. And consumers no longer get the results they expect from their financial advisors. It's often a case of overpromise and underdeliver, right?

If you're anything like me, you're frustrated with the negativity surrounding the financial world. That's why I'm searching for financial advisors who hold themselves to a higher standard and run their business adhering to one of the AE core principles of "do the right thing." That's how I treat the advisors I coach. That's how I ask you to treat your clients.

Wishing you much success,

Matthew J. Neuman ("Matty Neu")
Vice President of Advisor Development



MATTYNEU

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