

CTSM PORTFOLIO

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The Children's Study Home
2020



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SECTION 1
VITAL STATISTICS

Section 1: Vital Statistics

CANDIDATE PROFILE

As discussed in **516 Show and Tell: Presenting Yourself Professionally**, it is important for the reader to get to know you, where you came from, education, career background, and where you are today. I hope the readers of this comprehensive portfolio enjoy and, in the end, have a good understanding of the road I traveled to succeed in the marketing and trade show industry!

As a native of The Berkshires of Western Massachusetts – a treasured cultural and ecological mecca of New England – I developed a keen eye as a child for the unique, and sometimes overlooked, gems in our surroundings. My attention to detail as a young adult was seen through molding and painting ceramics in my grandmother's basement, capturing photographs on local hikes or family vacations, and having the determination to earn the Gold Award, the highest achievement from the Girl Scouts of the USA, requiring thirty hours of leadership work, forty hours of career exploration, and sixty-five hours in creating a community service project. Only five percent of eligible Girl Scouts receive the Gold Award.

I always knew that to fully broaden my horizons, I would have to relocate and take on new adventures and challenges that would ultimately make me who I am today. I graduated from the University of Tampa in 2003, where I earned my bachelor's degree in Communications, with a minor in Art and Advertising.

My professional career began when my best friend from the Berkshires suggested we move to the up-and-coming city of Charlotte, North Carolina. With my education and communications background, I was hired by IMEX Management, a North American trade show organizer uniting US companies with the rest of the world in the food & beverage, oil & gas, and construction industries. During four years and being promoted to the Marketing & Communications Manager, I traveled the world and actively coordinated the US visitor participation for a schedule of six international trade shows in Europe (Paris) and North America (Montreal and Las Vegas). I managed all functions for each trade show including pavilion design, advertising, North American Pavilion brochures and marketing materials, visitor promotion and recruitment campaigns.

After ten years of being away from home, I moved back to the Berkshires and began working as the Marketing Manager at Wave Systems. Wave Systems is a software security company located in Lee, Massachusetts, specializing in data encryption and cyber security. With my background in trade show and marketing experience, I found myself managing over thirty domestic and ten international trade shows and supporting worldwide sales and channel representatives for such partners as Dell and HP®, developing marketing emails, promotions, contests, collateral, signage and event invitations. In addition to developing and executing their trade show program from the ground up, I participated in defining, designing and establishing the new corporate web environment for two existing websites, Partner Portal and Sales Resource Center, as well as put in place a new Customer Relationship Management (CRM) database and an email marketing system for the company.

A friend, who was also the Chief Financial and Operating Officer of The Children's Study Home, approached me to work part-time creating brochures and graphics for the organization. After my initial interview, the organization quickly realized that I had extensive marketing and events experience. I took that knowledge and began to broaden my background even more in my position as the Marketing & Communications Manager at The Children's Study Home. This nonprofit organization serves children and families throughout the Pioneer Valley, Berkshires and Cape Cod areas in Massachusetts with residential, educational and family services. Over 15 years of experience in managing International trade shows, data security company and communication experience have made me a results-oriented marketing professional, able to effectively handle all aspects of events and trade shows, graphic design, email marketing and lead generation programs, website development, marketing material production and press relations. My experience in combining creative services, with problem-solving and outstanding communication skills, has strengthened my leadership skills and those I serve, providing strategic vision for this growing organization.

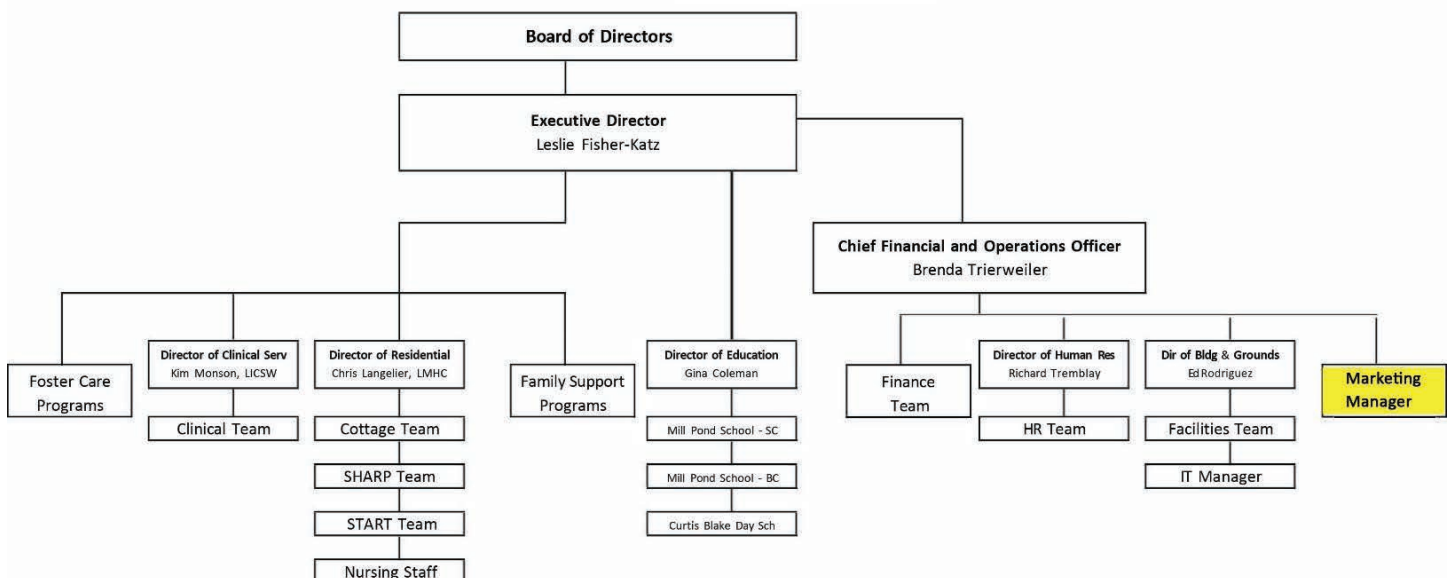
Section 1: Vital Statistics

JOB RESPONSIBILITIES

In my role as the Marketing & Communications Manager at The Children's Study Home, my job responsibilities include:

- Staff liaison for the Community Relations & Fundraising Committee, which meets on a monthly basis and includes Board of Directors and staff members. The Committee has added three additional annual fundraising events since 2018. Our flagship fundraiser is our annual Golf Tournament, normally raising over \$30,000.
- Manage planning, writing, and production of program materials, including brochures, letters, acknowledgments, and other relevant material.
- Draft press releases and articles to secure exposure in print, on television, and other related media for The Children's Study Home's events and activities.
- Manage and maintain agency's uniform organizational identity (branding) by overseeing uses employed by programs of The Children's Study Home, including the development of program and educational brochures, unified letterhead, business cards and ID badges.
- Work closely with the Executive Team in developing and implementing the annual External Communications Plan, including planning, outcomes, goals, objectives, tasks, and analysis.
- Provide meeting reminders, support and communications as requested for all Board Committees. This includes, but is not limited to, taking minutes at Board meetings, collection and distribution of materials, and updating the Board web portal with relevant information.
- Oversee the production of correspondence and promotion of organization's Annual and Staff Appeals.

The Children's Study Home, Inc. Organizational Chart 2020



Section 1: Vital Statistics

COMPANY HISTORY

The Children's Study Home, located at 44 Sherman Street, is the oldest social agency in western Massachusetts. It was founded in 1865 as the Springfield Home for Friendless Women and Children, with a mission to "provide a temporary home for friendless and destitute women and children; and to give them employment and instruction with the ultimate design of providing for them a more permanent situation, or of fitting them to maintain themselves" (Constitution, Art. 2, 1866).

The women who ran the Home initially conceived of it as an organization that would aid girls discharged from jail and children who had lost one or both parents, often because of the Civil War. A house was procured on Union Street, and the Home for Friendless Women and Children opened in April 1865 to its first four inhabitants: a girl who had been released from jail and a single mother with two children were cared for on Union Street. From these humble beginnings, the Home continued to service the needy, and by the end of the first year, forty women and twenty children had received assistance.



Rachel Capen Merriam

It was soon decided that the children required a separate facility from the women. In 1870, real estate developers John and William McKnight, bookbinders George W. and J. F. Tapley, and clothier Theodore Haynes donated one acre of land on Buckingham Street (valued at \$4,000) for the purpose of building a children's home. The 21-room house on Buckingham Street, built at a cost of \$16,000, opened the following June, marking the entry of what would become The Children's Study Home into the McKnight neighborhood. A November 3, 1895, *Springfield Republican* article offers a glowing description: "The house on Buckingham street is admirably suited to its purpose. The rooms, which are large, airy and well-lighted, could hardly be approved upon in the matter of their general arrangement. On the first floor are the parlor, the school-room and the dining-room as apartments which are most used by the children. Back of the dining-room is a smaller room where cases of contagious diseases are cared for. There is plenty of space and light in the dining-room for the half a hundred hungry youngsters who congregate there three times a day. ... [T]he rows of tables with their white spreads and plain but neat table wear, together with the little high chairs, many of them ornamented with bibs or aprons, make an inviting picture."

The Buckingham Home could accommodate up to one hundred children from birth to twelve years of age. In 1934, the smaller cottages on Sherman Street were built so as to offer individual rooms and more personalized care. The children moved into the Sherman Street cottages in 1935, and the Buckingham Home itself was razed in 1938 to make space for a larger play area. This was a significant change, made all the more so by the agency's decision in 1940 to become in part a "study home" (hence the new name) for the diagnosis and treatment of children with emotional and behavioral difficulties. Until 1940, children were accepted to the Home exclusively for custodial care; by 1960, residential treatment had supplanted custodial care as the Study Home's primary focus.

Strengthening family connections through regular visitation, providing family support and education, promoting and supporting vocational goals, and helping youth to have the experience of being a productive and engaged member of their community are all critical to increasing positive outcomes for youth transitioning out of foster and congregate care. It is our goal at CSH to have youth in foster and congregate care begin to lay the foundation for a successful transition into a connected and meaningful adulthood.

Today, The Children's Study Home serves children, adolescents, and families with special needs throughout the Pioneer Valley, the Berkshires and Cape Cod areas. The children we serve are often struggling to cope with behavioral, psychiatric, and cognitive issues related to the experiences they have survived. Our staff assesses their needs and develops individualized service plans that foster recovery, growth and wellness.

Section 1: Vital Statistics

COMPANY PROFILE

MISSION STATEMENT

The Children's Study Home is dedicated to partnering with families by providing innovative and educational programs and services that strengthen children and families; empowering them to succeed at home, within the community, and throughout life.

QUICK FACTS

Founded: 1865

Re-branded: New logo, collateral, brochures, website, ID badges, etc. in 2018

Headquarters: Springfield, Massachusetts

Locations in: Cape Cod, Massachusetts & Berkshires, Massachusetts

Employees: 200 Total full-time and Part-time

Services: 3 Educational Facilities, Foster Care Programs, Family Support Programs, and 3 Residential Homes (services broken down in pages 6-9)

COMPETITION

The Children's Study Home is primarily funded by the State of Massachusetts. We are proud to work closely with the Departments of Children & Families (DCF), Elementary & Secondary Education (DESE), and Early Education & Care (EEC) to serve children and families in need. We also work with local public school districts seeking Special Education for their students. Every 3-5 years, each State Department announces and provides details about a specific program through a request for proposal (RFP). The Children's Study Home decides if they would like to submit a bid for the RFP. The State Department reviews submitted bids and chooses the organization that best fits the program's guidelines.

Child Guidance Clinic of Springfield, MA - Another nonprofit organization that has similar Family Support Programs but does not offer Education or Residential Programs. They often submit Family Support Program RFP's to DCF.

The Child Guidance Clinic Outpatient program provides comprehensive mental health, educational, developmental, behavioral, and consultative services to children, adolescents, and their families in Springfield and surrounding communities. Their staff offers a variety of culturally competent programs in their clinic, at numerous community sites, and in homes.

Programs include:

Family Support and Training (Children's Behavioral Health Initiative)

Family Partners work alongside parents and caregivers to assist and empower them to access care on behalf of their children. Family Partners are available to caregivers of youth enrolled in Intensive Care Coordination, Outpatient Therapy and In-Home Therapy.

In-Home Therapy

An intensive and flexible service for children and families to address and support behavioral health challenges. Services are provided in any setting where the youth lives or attends school.

Intensive Care Coordination (ICC)

A voluntary outreach service that coordinates multiple services and supports for youth with serious emotional or behavioral health needs. A Care Coordinator and Family Partner are assigned to work with each youth/family enrolled in the program.

Therapeutic Mentoring (Children's Behavioral Health Initiative)

Youth spend dedicated one-on-one time with a caring mentor to work on building a variety of life skills in the community. Therapeutic Mentoring is a time-limited and targeted service intended to support other services that are already in place.

Section 1: Vital Statistics

A GLIMPSE INTO PROGRAMS & SERVICES

The following is a short overview of the organization's Education, Family Support, Community Based, and Residential programs and services.

EDUCATION PROGRAMS

MILL POND SCHOOL – SPRINGFIELD & BERKSHIRE

The Mill Pond School was established in 1976 and has since served hundreds of children with behavioral and emotional challenges. The Mill Pond staff develops a comprehensive individualized plan for each student. Students receive academic, therapeutic, and extra-curricular services that help each student achieve their identified goals and eventually move on to other challenges, better prepared to cope and conquer the challenges they face.

Our academics are extremely important and each classroom teacher is provided with an instructional aid to help better meet the needs of our students. Each student is placed in the appropriate group to help them achieve their individual goals. The goal for all students is to eventually move to a less-restrictive setting and to be a successful member of society.

CURTIS BLAKE DAY SCHOOL (CBDS)

The Curtis Blake Day School, named after the co-founder of Friendly's Ice Cream®, serves children in the first through ninth grades and offers a research-based, individualized academic program for students experiencing a language-based learning disability in reading, writing and/or mathematical skills. CBDS provides an innovative and effective model of teaching and learning, providing each student with the tools they need to succeed in school. The program engages a powerful language component with highly experienced teachers who coordinate instruction with a speech and language pathologist and speech language pathologist assistants to drive the curriculum, with a strong emphasis on comprehension strategies.

CBDS Student Art



CBDS Classroom



FAMILY SUPPORT PROGRAMS

FAMILY ASSESSMENT & MENTORING SERVICES (FAMS)

FAMS is a community based outreach service providing support for families living on Cape Cod. Supporting children transitioning back from out-of-home placement and for youth at risk of requiring out-of-home treatment services, FAMS is a powerful tool for families in need. Mentors engage youth and caretakers in their own home and community to provide advocacy, case management, clinical coordinators, medical and transportation services, educational assistance and parental support.

FAMILY REUNIFICATION AND SUPPORT PROGRAM (FRSP) & PARENT EDUCATION (FAST)

The Family Reunification Support Program (FRSP) is a supportive service for DCF involved families who have the goal of family reunification. FRSP works closely with DCF toward a family's identified goals. Family Support Workers will supervise visitations, provide parent education (FAST) and document parent/child interactions for DCF.

FAMILY VISITATION PROGRAM (FVP)

FVP is a service available to families in need of a supportive environment in which to visit with their children. Family support workers transport the children to and from visits. The Visit Supervisor provides a weekly report to the DCF Social Worker and Family Networks.

COMPREHENSIVE FOSTER CARE (CFC)

A child may need more supportive care and services than can be provided in their family homes or in traditional foster care. Comprehensive Foster Care provides a higher level of structure and supervision as well as advocacy and comprehensive wraparound services. Children receive intensive case management and a multidisciplinary service team for coordinating their care.

Before becoming a foster parent, The Children's Study Home will provide an explanation of parent expectations and other guidelines, and will help facilitate the required training through the Massachusetts Approach to Partnerships in Parenting (MAPP), a program to better prepare individuals for their role as a foster parent and help create and ensure that a safe home is provided for foster children. Foster parents receive specialized training, respite and other support for sustaining their important work in a child's life.

CAPE COD FAMILY SUPPORT PROJECTS (FSP)

The Cape FSP program is an after school and summer day program for at risk children. The goal is to help the child to be successful both in their home environment and community. FSP workers support children in the community to provide skill building and case management in a therapeutic setting.

FATHERS IN TRUST (FiT)

The Fathers in Trust program is a 32-hour course (on average 16 weeks) that covers the Fatherhood Development Curriculum, in a series of 2-hour sessions available on weekdays or weeknights. Our program is supported and held in conjunction with the After Incarceration Support Systems (AISS), a program of the Hampden County Sheriff's Department, located at the WW Johnson Life Center at 736 State Street in Springfield, MA. The 2-hour course meets weekly.

RESIDENTIAL SERVICES

START - ADOLESCENT RESIDENTIAL TREATMENT PROGRAM (Assigned female at birth; Ages 13-18)

The START Program for adolescents is designed to address the unique issues facing teenagers today. The initial primary focus is creating a safe and secure environment for the youth. The primary treatment protocol used at START is DBT (Dialectical Behavior Therapy). This DBT and Life Skills based group home averages a length of stay between 6 months and 1 year. The program is community based and provides treatment to youth who need more services and supervision than offered in foster care, and youth transitioning from intensive residential treatment programs.

START utilizes an incentive-based protocol, where residents can earn tokens for things such as extra phone calls, take-out food, small trinkets, etc. START residents attend middle and high schools either in the local community or the community from which they came from. Our goal is to support adolescents to leave our program with improved self-esteem, increased coping skills and a feeling of hope for the future.

START Resident



START Mural



THE COTTAGE (Assigned male at birth; Ages 6-13) & SHARP (Assigned male at birth; Ages 13-18)

Our group homes are therapeutic environments infused with positive reinforcement and behavioral treatment. We support children in their recovery from trauma, preparing them for stabilization and permanency. Our programs provide safe and secure environments for children to develop the skills necessary to be successful at home and in the community.

Children will benefit from the development of life and social skills, and a variety of recreational activities, including non-competitive games. Youth in our group homes have access to a variety of therapeutic and psycho-educational support groups to meet their individual needs. Each youth has an Individualized Treatment Plan developed by a multidisciplinary treatment team that describes specific needs and goals to be accomplished during a youth's stay at one of our group homes.

Cottage Picnic



Cottage Field Trip



COMMUNITY BASED PROGRAMS

CAMP CASA

Camp Casa provides a full day at summer camp for youth ages 6-12 at The Children's Study Home on Sherman Street. Our campers not only experience typical camp activities including sports, arts and crafts, talent shows, but also become team builders who explore their community. Campers experience field trips to local museums, zoos and events.

Camp Casa
Art Class



Camp Casa
Basketball Clinic



SECRET SANTA

2019 marked the 154th year of The Children's Study Home's Secret Santa program! With the CSH staff and the community's dedication, we put over 400 smiles on children's faces and helped families enjoy the Holiday Season. Some of the gifts are given to children in foster care, some to children living in homes with few resources to spare for toys, games or even coats. Gifts not only make for a special time, but they also convey the true message of this wonderful time of year. Additional thanks go out to the organizations that held toy drives during the Holiday Season for CSH.

STCC Student
Secret Santa Donors



Springfield Symphony
Secret Santa Donors



Morrison's
Secret Santa Donations



SECTION 2
OVERVIEW/EVENT SCHEDULE

Section 2: Overview/Event Schedule

INTRODUCTORY REMARKS

For 31 years, the only annual fundraising event held at CSH was the Excel Open Golf Tournament. The golf tournament has always brought in a significant amount of revenue, but lacked the management and coordination of building on the success of the prior year. This was due to staff turnover and lack of cohesive marketing skills and plans. Prior to me assuming the position of Marketing & Communication Manager at The Children's Study in 2018, there was no one that actively created and managed new fundraising events for the organization. Below is a recap of the 2019 events.

| The Children Study Home's 2019 Events | | | | | |
|---------------------------------------|--------------------|-------------------------------------------------|--------------------------------------------------------|------------------------|-----------|
| Event | Date | Location | Speaker | Primary Sponsor | Profit |
| 1st Annual Celebrity Bartender Event | April 11, 2019 | Nathan Bill's Bar & Restaurant, Springfield, MA | No | No | \$1,200+ |
| 31st Annual Golf Tournament | May 2, 2019 | Country Club of Wilbraham, Wilbraham, MA | Anthony Gulluni Hampden County District Attorney | Excel Dryer, Inc. | \$32,000+ |
| Annual Meeting | June 6, 2019 | Log Cabin, Holyoke, MA | Tricia Farley-Bouvier State Representative | Royal Law Firm | NA |
| 1st Annual Bowling Fundraiser | June 18, 2019 | Shaker Bowl, East Longmeadow, MA | No | MP CPAs & LLumin, Inc. | \$4,000+ |
| 1st Annual Art Show & Auction | September 19, 2019 | The Barney Estate, Springfield, MA | Jesse L. Lederman At-Large Springfield City Council | No | \$6,000+ |
| CSH Holiday Party | December 5, 2019 | Log Cabin, Holyoke, MA | Nicholas Cocchi Sheriff of Hampden County | Peoples Bank | NA |

THREE NEW FLAGSHIP 2019 FUNDRAISING EVENTS

In my position as Marketing & Communication Manager, I was the staff liaison for the Community Relations & Fundraising Committee. Seeing a need to create additional opportunities for fundraising, I developed three new fundraising events: The Celebrity Bartender Event, Bowling Fundraiser, and the Art Show & Auction. In the past few years, I have seen a trend in popularity to smaller events such as the Celebrity Bartender Event and Bowling Fundraiser. These events create comradery with co-workers, the Board of Directors and families. Celebrity Bartender events have been a trend setter in every large city in the world. These events, especially the Celebrity Bartender event, build excitement for the audience – Who are the celebrities participating? Why are they participating? Who is the cause for? How are the celebrity's bartending skills?

Celebrity Bartender Event



Bowling Fundraiser



With my love for the arts, coupled with my graphics background, I recommended the concept of a Student Art Show & Auction. Who does not want to support children, the arts, and local nonprofit organizations? Over 30 pieces of artwork from all mediums, including acrylic, watercolor, colored pencil, chalk and sculptures were displayed by the students of The Children's Study Home's Mill Pond School Springfield and Curtis Blake Day School, as well as our residential programs. In addition, we gathered the support of local art teachers to teach the children different art mediums, collect the art and frame each piece.

Art Show & Auction



Art Show & Auction



As discussed in **20112 Selecting the Right Shows: The Critical Decision**, "Determining your event mix strategy is critical to making decisions regarding your show and event participation." The success of the organization's events was accomplished by creating clear goals tied directly to company objectives, selecting the appropriate marketing outlets, media and investment levels, discovering the best ways to work with internal staff and Board of Directors, and building a dashboard to measure impact, track progress and identify areas of concern for future annual events. The Board of Directors and CSH senior management were very pleased with the outcome of these events and agreed to making them annual.

2020 EVENT SCHEDULE

The Children Study Home's 2020 Events

In 2020, events in the State of Massachusetts were affected by COVID-19. On March 10th, Governor Charlie Baker declared a state of emergency. As the pandemic quickly spread, he then closed all non-essential businesses and organizations on March 24th. This in-turn affected my event calendar. Please see the "Special Circumstances" column below, noting CSH events affected by COVID-19.

| Event | Proposed Date | Location | Speaker | Primary Sponsor | Special Circumstances |
|--------------------------------------|--------------------|-------------------------------------------------|---------------------------------------|-------------------|-------------------------------------------------------|
| 2nd Annual Celebrity Bartender Event | April 2, 2020 | Nathan Bill's Bar & Restaurant, Springfield, MA | No | No | Cancelled Due to COVID-19 |
| Annual Meeting | June 4, 2020 | Log Cabin, Holyoke, MA | No | No | Changed to a Virtual Event Due to COVID-19 |
| 32nd Annual Golf Tournament | August 20, 2020 | Country Club of Wilbraham, Wilbraham, MA | Kara Wolters Olympic Gold Medalist | Excel Dryer, Inc. | Postponed From Original May 14th Date Due to COVID-19 |
| 2nd Annual Bowling Fundraiser | September 23, 2020 | Chicopee Lanes, Chicopee, MA | No | No | Cancelled Due to COVID-19 |
| 2nd Annual Art Show & Auction | October 2, 2020 | The Barney Estate, Springfield, MA | No | No | Cancelled Due to COVID-19 |
| CSH Holiday Party | December 3, 2020 | Log Cabin, Holyoke, MA | No | No | Cancelled Due to COVID-19 |

SECTION 3
EVENT OF FOCUS &
MEASURABLE EVENT OBJECTIVES

Section 3: Event of Focus & Measurable Event Objectives

INTRODUCTORY REMARKS & TARGET AUDIENCE

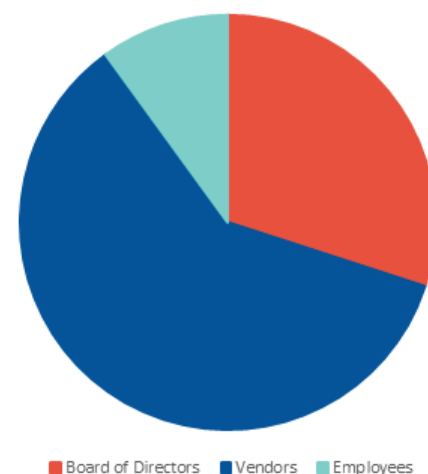
The Excel Open Golf Tournament is the largest fundraising event for The Children’s Study Home. The annual tournament was created by The Children’s Study Home’s Board of Director Emeritus, Denis Gagnon of Excel Dryer, Inc. of East Longmeadow, MA. Excel Dryer has been the Naming Sponsor each year, supporting the tournament with \$8,000. I chose this event to focus my portfolio on for the following reasons:

- This is the only fundraising event for The Children’s Study Home due to COVID-19. The event profit is extremely important to reach existing and new organization donors.
- This is the first year that I managed all aspects of the tournament.
- The tournament relocated to a new golf course, The Country Club of Willbraham. This is the first time the tournament has been relocated in 28 years.
- I secured all company sponsorships and golf team participants.
- I developed all marketing materials, including the tournament event web page, email marketing, direct mail pieces, signage, the tournament program, etc.
- I managed all the tournament day logistics, including registration, on-site catering, on-course fundraising promotions (50/50, putting contest, and Texas Holdem’ card game), volunteers, basket raffles and silent auction items, course team photos and photo session with Kara Wolters, Olympic Gold Medalist.
- I researched, acquired, rolled out, implemented and managed the new donor management software, Salsa Labs.

TARGET AUDIENCE & DEMOGRAPHICS

Sponsors and attendees of the golf tournament are typically comprised of:

- Vendors from The Children’s Study Home and Excel Dryer, Inc. (60%),
- The Children’s Study Home’s Board of Directors (30%),
- Employees of The Children’s Study Home (10%).



All participants are typically from Western Massachusetts, specifically Pioneer Valley (85%) and the Berkshires (15%).

Section 3: Event of Focus & Measurable Event Objectives

EVENT OBJECTIVES

The main goal of the 2020 golf tournament is to raise funding to build a new pavilion at the CSH Administration Building to provide an outdoor space for children and families to enjoy picnics, family reunifications, residential home lunches, barbecues, Board of Director events, Committee meetings, etc.

Proposed New Pavilion



The pavilion's estimated cost to build is between \$30,000 to \$40,000. Last year, the Annual Excel Open Golf Tournament raised over \$30,000 to refurbish our three residential homes. The Children's Study Home is looking to exceed the tournament profit last year, even during the midst of COVID-19, and raise \$34,000. The 32nd Annual Excel Open Golf Tournament was originally set to take place on May 14, 2020 but was postponed until August 20, 2020 due to COVID-19.

The event objectives, tactics, assessment methods and measurable goals follow the below definitions in **30812 Business Marketing Strategies and Trade Shows**.

- Strategy: A plan of action intended to accomplish a specific goal
- Objective: Measurable results set in a specific time frame – what we want to accomplish
- Tactic: Specific activities and actions

| Objective | Tactic | Assessment Method | Measurable Goals |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tournament Profit | | | |
| Sponsors | Mail, email and post on social media the Save the Date postcard, and mail an invitation letter to previous sponsors. Both pieces to include the brand-new event website, which allows sponsors to sign-up online. | Track email opens and clicks through Salsa. Track confirmed sponsorships through the event website. | Mail 80 Save the Date postcards and 80 invitation letters to prior sponsors. Secure more than 35 sponsors (2019), an increase of 10% for 2020. Email a series of 4 campaigns to over 250 contacts through Salsa |
| Players | Mail, email and post on social media the Save the Date postcard, and mail an invitation letter to previous and new potential attendees. Both pieces to include the brand-new event website, which allows attendees to sign-up online. | Track email opens and clicks through Salsa. Track confirmed players through the event website. | Mail 120 Save the Date postcards and 120 invitation letters to prior attendees. Secure more than 92 attendees (2019), an increase of 5% for 2020. |
| On Course Promotions | Increase on course promotion profit of the 50/50, Texas Holdem' and putting contest by utilizing additional volunteers. | Results will be determined following the event by the Finance Department. | Sell: 50/50 - \$250 Putting Contest - \$350 Texas Holdem' - \$500 |

| Objective | Tactic | Assessment Method | Measurable Goals |
|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Increase Brand Awareness | | | |
| Giveaways | Hand out branded (CSH and bag sponsor logos) backpacks to all attendees. Each to include a sleeve of 3 golf balls, a branded golf towel and tees, a bottle of water and a snack bar. | Count event attendees and remaining inventory of purchased giveaways | Distribute 100 bags |
| Brochures | Hand out new CSH program brochures at registration | Count pre-event and post-event inventory levels | Distribute 75 brochures |
| Objective | Tactic | Assessment Method | Measurable Goals |
| Maintain A Satisfied Attendee Experience During COVID-19 | | | |
| Registration | Follow social distancing guidelines; set-up tent and tables outside with 6' distancing | Set up 4 lines behind the registration tent | Registration line allows one team (4 people) at a time |
| Golf Carts | Each team of 4 is allowed 2 golf carts. If a team is not comfortable with 2 people in a cart, one person could walk or request another cart for \$85. | Count carts and attendees | Keep the number of carts below 58, as this is the total number of carts the course has on hand for the tournament. |
| Catering | Due to COVID-19, in place of the breakfast and dinner buffets, a breakfast grab-and-go sandwich and a plated dinner were provided. New guidelines introduced on August 7 reduced outside event numbers from 100 to 50. | Since the event had 100 registered golfers, we divided the event into 2 catering contracts and 2 seating areas. | 50 attendees under the tent and 50 on the back patio |
| Speaker Photos | Set up a stationary area on putting green for attendees wishing to take photos with Kara Wolters and her Olympic Gold Medal. The photo area was set up with the CSH banner stand between Kara and the attendee(s) to provide 6' distancing. | This will be determined post-event on the number of attendees that participate. | 50 attendees to take photos with Kara Wolters |

**SECTION 4
MANAGEMENT OF EXHIBIT
DESIGN/PRODUCTION**

Section 4: Management of Exhibit Design/Production

INTRODUCTORY REMARKS & NEW VENUE

After 28 years of holding the Excel Open Golf Tournament at Crestview Country Club in Agawam, MA, The Children's Study Home's Golf Committee decided to look into other course venues after the tournament in 2019. Several factors led to our decision:

- Poorly maintained turf and rough
- Unmaintained passages to each hole
- Not attentive to details of the tournament
- Not enough golf carts for the tournament
- Decline in catering quality from previous years

I researched several course options in Western Massachusetts, including Twin Hills Country Club in Longmeadow, The Ranch Golf Club in Southwick, Chicopee Country Club in Chicopee, Franconia Golf Club, and the Country Club of Wilbraham in Wilbraham. I referred to **52112 Negotiating Skills to Win** when reviewing course options and discussing price per golfer and carts. My main goal was to reduce the overall cost of \$80.00 per golfer and \$6.00 per golf cart from the previous year, as well as address the other issues mentioned above.

Due to COVID-19, all in-person Golf Committee Meetings were canceled. In an effort to update the Golf Committee on the planning process, I implemented a new form of communication to the Committee in March. Entitled 'Zooming for the 2020 Golf Tournament' meetings, I would provide weekly updates to the team on the planning progress and provide video conferencing for feedback and questions. This was outlined in **20412 Don't Skip the Meetings (ELCs #s 2 & 3)**. I put together a meeting agenda for each Friday, which was emailed each Thursday morning. All Golf Committee Members were invited to attend. Meeting notes and a recording of the meeting was emailed afterwards to all.

After an extensive review, The Country Club of Wilbraham (CCW), was chosen as the most cost-effective, with the capability to hold both breakfast and dinner options using an in-house caterer. CCW was very clean, well-kept, and prestigious according to the other Golf Committee members. Bobby Downes, the Golf Pro at CCW, was very accommodating in meeting our requirements, providing enough golf carts, and most importantly, providing us with a



CCW Course

tournament date on a Thursday. Bobby was able to keep us below my budget at \$69.68 per player and golf carts at no charge. He was also extremely helpful once COVID-19 hit in providing us with the new date of August 20th. Starting in May, Bobby and I had weekly calls to touch base on the tournament and the changing effects of COVID-19.

NEW DONOR MANAGEMENT SOFTWARE

Not only is it important to acknowledge the new venue of the Excel Open Golf Tournament, but also the organization's investment in a new donor management software in time for the 2020 tournament. In 2018, upon joining The Children's Study Home, there was no way to track donor relations, donations, event profit, etc. I was provided all past donation information in an Excel spreadsheet. With my prior marketing experience, I knew that we needed a system to cultivate donations for the organization. I began researching Customer Relationship Management (CRM) software and more specifically, nonprofit donor software. I extensively reviewed Salesforce, DonorPerfect and Salsa Labs. Salesforce had more of a corporate feel and less specific to donor management. DonorPerfect seemed to manage donor information, but the interface and marketing aspect were lacking. In September 2019, I presented Salsa Labs to Senior Management and recommended we purchase the software as it would work best for our needs.

In November, the decision was made to purchase Salsa Labs donor management program. Salsa Labs software is comprised of two sections: Customer Relationship Management (CRM) that manages and analyzes interactions with past, current and potential customers and Salsa Engage that manages digital marketing, online fundraising, online advocacy, and peer to peer fundraising. I input the past three years of tournament information, as well as other CSH event and donation data, into Salsa prior to the 2020 Excel Open Golf Tournament. This system truly makes it efficient for us to manage donor cultivation and marketing efforts.

GOLF COURSE DESCRIPTION

The Country Club of Wilbraham (CCW) is an 18-hole course, navigating through rolling and wooded terrain. Opened in 1927, CCW has evolved into one of the most appealing, enjoyable and friendly clubs in Western Massachusetts. Following the design of Willie Ogg, a professional golfer and golf club designer from Carnoustie, Scotland, the course initially consisted of only 9 holes. Remaining relatively unchanged until the late 1980s, legendary course Geoffrey Cornish's trademark modifications of fast, undulating greens and strategic bunkering are still enjoyed on the front nine today. In the spring of 2002, the back nine holes designed by Rowland Armacost were opened for play. The front 9 and the back 9 holes are divided by the main road, parking lot, club house, putting green and adjoining pro-shop.



CCW Score Card

TOURNAMENT LOGISTICS

The Country Club of Wilbraham has 58 golf carts on-site. As we began planning, it was feared that each participant would want to have their own golf cart due to the pandemic. As a solution, the Golf Committee decided to inform the participants prior to the tournament that each team of 4 was allowed 2 golf carts. If a team was not comfortable with 2 people in a cart, one person could walk or request another cart for \$85, which they would be responsible for paying. In the end, there was a perfect number of golf carts: 50 for the attendees and 4 for CSH staff and volunteers.

Each golf cart included two attendee drawstring bags, branded with the CSH and bag sponsor logos. Each bag included a sleeve of golf balls, a branded CSH golf towel and tees, a bottle of water and a snack bar.

There were 40+ sponsorships that included a tee sign, which were placed on greens throughout the course. Over \$400 was saved by reusing signs from 2019.

CCW Event Golf Carts



Attendee Gift Bags



REGISTRATION

Tournament registration began at 9:30 am and was set up on the right side of the club house, facing the parking lot. This provided easy access for registrants as they entered the facility. There were four staff members at registration, each with a specific task: check in registrants and teams, sell basket raffle tickets, sell 50/50 tickets, and sell Texas Holdem' on course participation cards. This setup allowed for the appropriate social distance guidelines of staff and participants. The registration table was branded with the CSH tablecloth and included CSH promotional items (pens, mouse pads, notepads, frisbees and buttons) and brochures.

Event Registration



Event Registration



RAFFLE BASKETS

Each of the 24 Board Members of The Children’s Study Home was asked to donate a \$100 basket for the tournament. These baskets varied in themes, including gardening, a scratch ticket tree, margaritas, restaurant gift cards, golf, Lego, Italian foods, chocolate lovers, etc. Normally, the Golf Committee asks local businesses, restaurants and services for raffle donations, but due to the pandemic, we did not want to reach out to businesses that may already be experiencing hardships this year.



Event Raffle Baskets

CATERING

Chez Josef is the on-site caterer for The Country Club of Wilbraham. We met in March to determine breakfast, lunch and dinner options. In previous years, the tournament always had a breakfast buffet during registration (eggs, two meat options, home fries, fruit, pastry, coffee, juices, etc.), hot dogs and chips served by the CSH Board of Directors on the course, and a dinner buffet (carving station, pasta, two vegetable selections, rolls and dessert). COVID-19 impacted these initial discussions, once it was determined that buffets were no longer allowed in the State of Massachusetts. Once the golf tournament was postponed from May to August, pandemic guidelines became even stricter. In the beginning of August, it was determined that all food had to be plated and served or sealed in an appropriate container for grab-and-go service, which would bring costs up due to the increase of servers and containers. In **20312 The Nuts and Bolts of Budgeting for Results**, I learned to develop strategic budgeting based on goals, identify the hard and soft costs, etc. I shared my budget with Chez Josef to collaborate on menu items to balance the increased cost, and used templates and worksheets to track all food expenses in one place.

On August 7th, the Governor reduced outside event gatherings from 100 to 50. To avoid canceling the event, we came up with a solution to have two seating areas and two catering contracts. Chez Josef fit 50 people on the back patio and 50 people under a tent with tables at 6’ distancing.

Breakfast began at 9:30 am and consisted of grab-and-go breakfast sandwiches, fruit and to-go style coffee, tea, and juices. Participants were allowed to sit at tables on the patio and under the tent.



Breakfast on the Patio

CATERING (cont.)

Throughout the afternoon from 11:00 am to 3:00 pm, hot dogs and chips were served as grab-and-go for participants to pick up as they played through the course.

Dinner began at 4:30 pm and consisted of plated portions of an 8 oz. steak, a chicken skewer with vegetables and skillet fries with peppers and onions. In addition, a side Caesar salad and a brownie and cookie for dessert was included. Participants were served by the staff on the patio and under the tent.

Dinner Under the Tent



Dinner on the Patio



ON COURSE PROMOTIONS

To raise additional profit for The Children’s Study Home, we had the following on course promotions:

- 50/50: \$5 for an arm’s length of tickets were sold throughout the day. The winner received 50% of the proceeds and 50% of the proceeds went to CSH. The 50/50 winner ended up donating their proceeds back to CSH!
- Putting Contest: \$20 per team or \$5 per player. The putting contest was held throughout the day on the putting green behind the clubhouse. Putters qualify for the final round by being the closest to the hole. The winner received 50% of the putting contest proceeds and 50% of the proceeds went to CSH. The Putting Contest winner ended up donating 100% back to CSH!
- Texas Holdem’: For \$20, each participating player received a Texas Holdem’ card. The winner received 50% of the Texas Holdem’ proceeds and 50% of the proceeds went to CSH. The Texas Holdem’ winner ended up donating 100% back to CSH!

Texas Holdem’ Player Card

**Texas Hold-Em
Golf RULES**

- ⌚ Each participant will draw a playing card at each Par 3. The selected card will then be written down in Box 1.
- ⌚ If the participant’s tee shot safely lands and stays on the green, they will draw an additional card and have it written in Box 2.
- ⌚ Can not be combined with any other fundraising promotions.

HAND RANKINGS

| | |
|----------------------|-----------------|
| Royal Straight Flush | Straight |
| Five of a Kind | Three of a Kind |
| Straight Flush | Two Pair |
| Four of a Kind | One Pair |
| Full House | High Card |
| Flush | |

- ⌚ Flop, Turn & River Cards will be drawn at Dinner
- ⌚ The Best hand will receive (in cash) 50% of the total prize pool
- ⌚ TIES – MONEY WILL BE SPLIT

THE CHILDREN'S STUDY HOME
CSH
EST. 1865

PAR 3
GOLF CARD
\$20 Entry Fee

SPEAKER

Kara Wolters, Olympic Gold Medalist, UCONN National and WNBA Champion, was the event speaker. Kara was recruited to play at UCONN for Coach Geno Auriemma on a scholarship, and in 1995, with a 35-0 team record, she won an NCAA National Championship with the UCONN Huskies. Kara went on to become one of only nine players in the world to have the elusive “set”- NCAA National Championship (1995), WNBA Championship (1999) and an Olympic Gold Medal (2000). Kara was recently inducted into the Women’s Basketball Hall of Fame in Knoxville, TN (2017). Today, Kara works as an in-studio analyst for the UCONN Women’s Basketball games on Sports New York Television (SNY). She is also a motivational speaker, a coach to young players in the Connecticut Travel and AAU Programs, and provides her knowledge by coaching young athletes, offering private basketball lessons year-round, and running basketball camps for girls during the summer.

Kara brought her Olympic Gold Medal to take photos with the golf participants during cocktail hour at 4:00 pm on the putting green, located between the patio and tent of guests. We used the CSH banner stand to provide 6’ social distancing between Kara and the guest. We had over 25 guests take photos with Kara. Following the tournament, I printed 8 in. x 10 in. photos, had Kara personally sign them, and mailed the photos with the attendee thank you letters.

Kara spoke during dinner at 5:30 pm, explaining her journey as an awkwardly tall child, who used her height later in life to benefit her career as a champion basketball player and later as a role model to young girls. The Country Club of Wilbraham provided extra speakers (at no cost) under the tent and patio to ensure all guests were able to hear Kara talk.

Speaker and Attendee Photo



Speaker Presentation



Section 4: Management of Exhibit Design/Production

BUDGET

The 2020 budget was based on expenses from the 2019 Excel Open Golf Tournament. As you will see from the grid below, I was able to keep most costs under budget. Explanations for each expense are noted in the grid under Notes.

Again, I used **20312 The Nuts and Bolts of Budgeting for Results** throughout the budget process by repurposing tee signs and table tents, thereby saving printing costs. Templates and worksheets were used to track all expenses in one place.

| Expenses | 2020 Budget (Based on 2019) | 2020 Results | Variance | Notes |
|--------------------------------------------|--------------------------------|--------------------|-------------------|---------------------------------------------------------------------------------------------------|
| Golf Committee Meeting Lunches | \$250.00 | \$199.62 | \$50.38 | Less in-person meetings due to COVID-9 |
| Golf Mailings | \$750.00 | \$430.00 | \$320.00 | Additional donation received from a new printing company |
| Draw String Bags | \$400.00 | \$385.01 | \$14.99 | Ordered fewer bags |
| Program Printing | \$400.00 | \$400.00 | \$0.00 | |
| Event Speaker | \$500.00 | \$1,000.00 | -\$500.00 | The decision was made to approve the additional cost for a local speaker from the sports industry |
| Speaker Photos | \$176.98 | \$121.90 | \$55.08 | Due to COVID-19, less teams requested photos taken and printed |
| Tee Signs | \$800.00 | \$397.76 | \$402.24 | Reused signs from 2019 sponsors |
| CCW Player Fees | \$9,288.00 | \$6,968.00 | \$2,320.00 | By switching venues, we were able to reduce the per player price and golf cart fees |
| Chez Josef Catering | \$8,860.25 | \$10,274.50 | -\$1,414.25 | Catering fees slightly higher in 2020, with an increase in servers and to-go containers |
| Additional Signage and Sponsor Table Tents | \$880.00 | \$244.38 | \$635.62 | Reused signs from 2019 |
| Trophies | \$168.00 | \$106.60 | \$61.40 | Reduced the number of trophies given out for 2020 |
| Total Expenses | \$22,473.23 | \$20,527.77 | | |
| Income | | | | |
| Sponsorships/ Foursomes | \$46,530.00 | \$52,075.00 | \$5,545.00 | Sponsors from 2019 increased their sponsorship levels |
| Putting Contest | \$370.00 | \$375.00 | \$5.00 | Normal profit from year-to-year |
| 50/50 | \$625.00 | \$550.00 | -\$75.00 | Reduced possibly due to COVID-19 and attendees spending less money |
| Basket Raffles | \$3,820.00 | \$3,700.00 | -\$120.00 | Reduced possibly due to COVID-19 and attendees spending less money |
| Texas Holdem' | \$1,050.00 | \$1,120.00 | \$70.00 | Texas Holdem' was more popular for the 2nd year of the game |
| Additional Donation | \$300.00 | \$60.00 | -\$240.00 | Additional donations were not received |
| Total Income | \$52,695.00 | \$57,880.00 | \$5,185.00 | |
| *Net Income | \$30,221.77 | \$37,352.23 | \$7,130.46 | *My goal was \$34,000 profit, as noted in Section 3, page 16. |

SECTION 5
MANAGEMENT OF INTEGRATED
MARKETING COMMUNICATIONS (IMC)

INTRODUCTORY REMARKS

Management of Integrated Marketing Communications is the most exciting section for me to showcase my extensive background in marketing and graphic design. This is the first golf tournament for CSH where all marketing communications followed the organization's new branding. I completed the new logo in late 2018, which can be found on all brochures, letterhead, giveaways, signage, email marketing, social media, etc. It was important that all aspects of marketing were cohesive, visually appealing, and easy to understand in helping retain information, especially with the change of the tournament date. In **61712 Graphics Boot Camp: The Basics Every Event Manager Should Know**, I was able to use integrated messaging across all the tournament's communications.



In **31512 Integrated Marketing Communications**, it explained that understanding pre-, at- and post-show tactics are extremely important in presenting successful marketing tactics to the participants. Pre-event tactics I used included direct mail, email marketing, social media, press release and event website. At-event tactics I used included signage, collateral, giveaways and social media. Post-event tactics I used included direct mail, social media and a survey. It is important to know and understand your target audience when developing integrated marketing communications. I found that email marketing and social media were the most effective communication methods in building awareness, reinforcing messaging, and building a "buzz" around the event.

Marketing communications are important along the entire planning stages of an event, whether pre-, at- or post. I firmly believe that post-event communications can be the most important to express gratitude to all the participants and sponsors. Thanking each participant for their role in the tournament will make them want to participate in future years. It is equally important to send a post-event survey to participants. The objective of a post-event survey is to determine whether the efforts put into your event planning met expectations for attendees, speakers and sponsors. In **10512 Using Surveys to Measure Your Performance in Trade Shows and Events**, it was explained that a post-event survey shows appreciation, and welcomes comments and suggestions on how to improve future events. This make the attendee feel special and honored.

A few tips I learned in **10512 Using Surveys to Measure Your Performance in Trade Shows and Events** are:

- Keep questions to 12 or less. The longer the survey the less likely your audience will stick around.
- Make your questions easy to answer. Attendee's time is valuable, so don't crowd their post-event survey with labor-intensive questions. Give them fast, easy ways to answer your questions by using drop down lists, matrix fields and radio buttons.
- Use plain speak. Don't make your surveys so inundated with professional jargon that the attendee must read the question more than once to understand what you're asking.

The following are the different types of marketing communications that I selected for the tournament. They are broken down by pre-event, at-event and post-event.

Section 5: Management of Integrated Marketing Communications (IMC)

PRE-EVENT MARKETING COMMUNICATIONS

| Communication Method | Rationale | Target Audience | Measurable Goals | Assessment Method | Results | Recommendations |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Save the Date Postcard #1 | To announce the new location and the May 14th date of the 32nd Annual Excel Open Golf Tournament | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | Mailed 200 postcards | No postcards were returned | Not able to determine if this communication was effective due to other communication methods sent during the same time frame | Continue to mail a Save the Date postcard; earlier if possible |
| Save the Date Postcard #2 | To announce the new tournament date, August 20th, due to COVID-19 | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | Mailed 200 postcards | No postcards were returned | Not able to determine if this communication was effective due to other communication methods sent during the same time frame | Monitor if a 2nd postcard with change of date is needed |
| Event Web Page | Consolidate all event information in one place. For the first time, allow sponsors and player to register and pay online; highlight confirmed sponsor logos; give those that are unable to attend the opportunity to donate | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | <ul style="list-style-type: none"> 300 page views \$4,000 in sponsorships \$2,280 (\$760/team) in registrations | Track results through Salsa | <ul style="list-style-type: none"> 428 page views \$2,000 in sponsorships \$760 (\$760/team) in registrations | <ul style="list-style-type: none"> Continue creating a tournament event page Since this was the first year for the web page, it increased awareness of submitting forms and payments online. |
| Email Invitation | To announce the new location and the August 20th date of the 32nd Annual Excel Open Golf Tournament | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | <ul style="list-style-type: none"> 95% Delivery 40% Opened 10% Clicked | Track results through Salsa | <ul style="list-style-type: none"> Sent 297 emails through Salsa 98.99% Delivered 34.01% Opened 3.06% Clicked | <ul style="list-style-type: none"> Continue to send eblasts and nurture through Salsa Next time send tailored emails to specific demographics, job titles, etc. Next time send tailored emails to those that open and click |
| Invitation Letter, Sponsorship and Registration Forms Mailing | Letter to announce the new tournament date, August 20th with necessary forms to participate in the tournament | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | Mailed to 200 envelopes | No envelopes were returned | Not able to determine if this communication was effective due to other communication methods sent during the same time frame | Continue to mail an invitation letter and forms; earlier if possible |
| Press Release Email | To announce the tournament speaker and create buzz around her local connection and sports background | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | <ul style="list-style-type: none"> 95% Delivery 40% Opened 10% Clicked | Track results through Salsa | <ul style="list-style-type: none"> Sent 291 emails through Salsa 98.98% Delivered 33.33% Opened 6.87% Clicked | <ul style="list-style-type: none"> Continue to send eblasts and nurture through Salsa Next time send tailored emails to specific demographics, job titles, etc. Next time send tailored emails to those that open and click |
| Deadlines Extended Email | To announce the extension of sponsorship and attendee deadlines to July 24th | <ul style="list-style-type: none"> Past tournament players and sponsors Potential new players and sponsors | <ul style="list-style-type: none"> 95% Delivery 25% Opened 10% Clicked | Track results through Salsa | <ul style="list-style-type: none"> Sent 293 emails through Salsa 99.66% Delivered 30.38% Opened 2.05% Clicked | <ul style="list-style-type: none"> Continue to send eblasts and nurture through Salsa Next time send tailored emails to specific demographics, job titles, etc. Next time send tailored emails to those that open and click |
| Facebook, Twitter and Instagram Pre-Show Posts | <ul style="list-style-type: none"> To announce the event (venue and original date), then to announce the new date Create buzz Cost effective method | <ul style="list-style-type: none"> Past and potential tournament players and sponsors Social media followers | <ul style="list-style-type: none"> 30 likes and/or shares on Facebook 2 likes and/or shares on Twitter 5 likes and/or shares on Instagram | Count likes and shares on Facebook, Twitter and Instagram | <ul style="list-style-type: none"> 15 likes and/or shares on Facebook 0 likes and/or shares on Twitter 2 likes and/or shares on Instagram | <ul style="list-style-type: none"> Continue to promote pre-show events on social media Create more posts on Twitter and Instagram and increase overall followers Consider creating a sponsorship to purchase Facebook advertising |

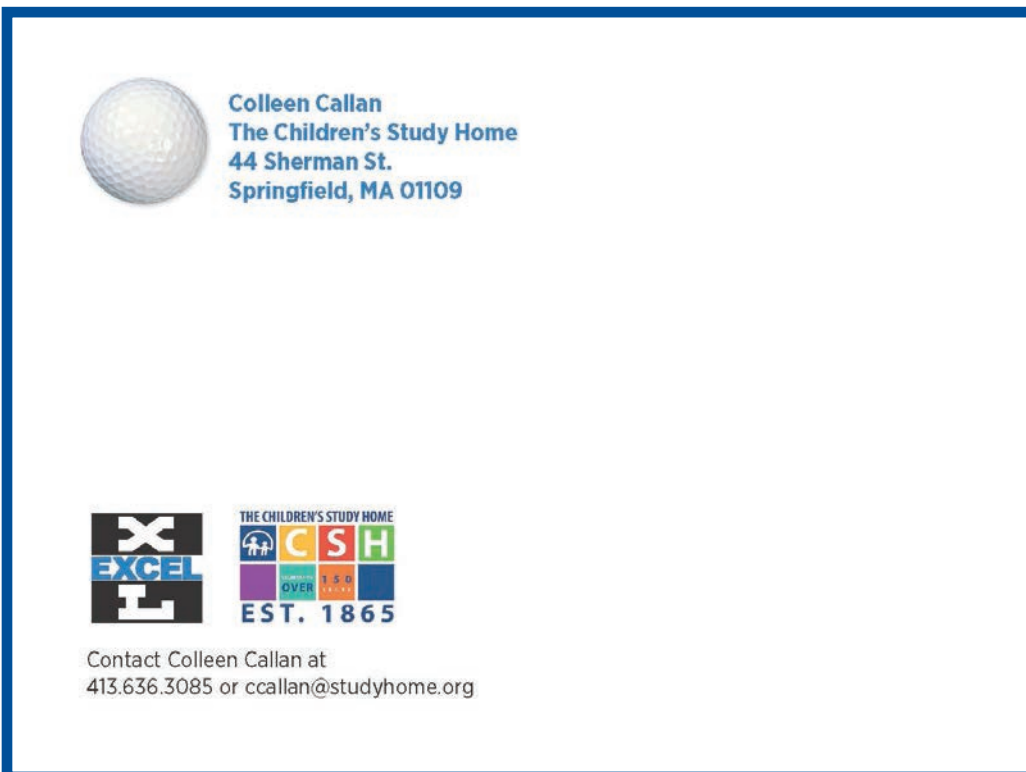
PRE-EVENT MARKETING COMMUNICATIONS (p. 29-39)

Save the Date Postcard #1

Front



Back



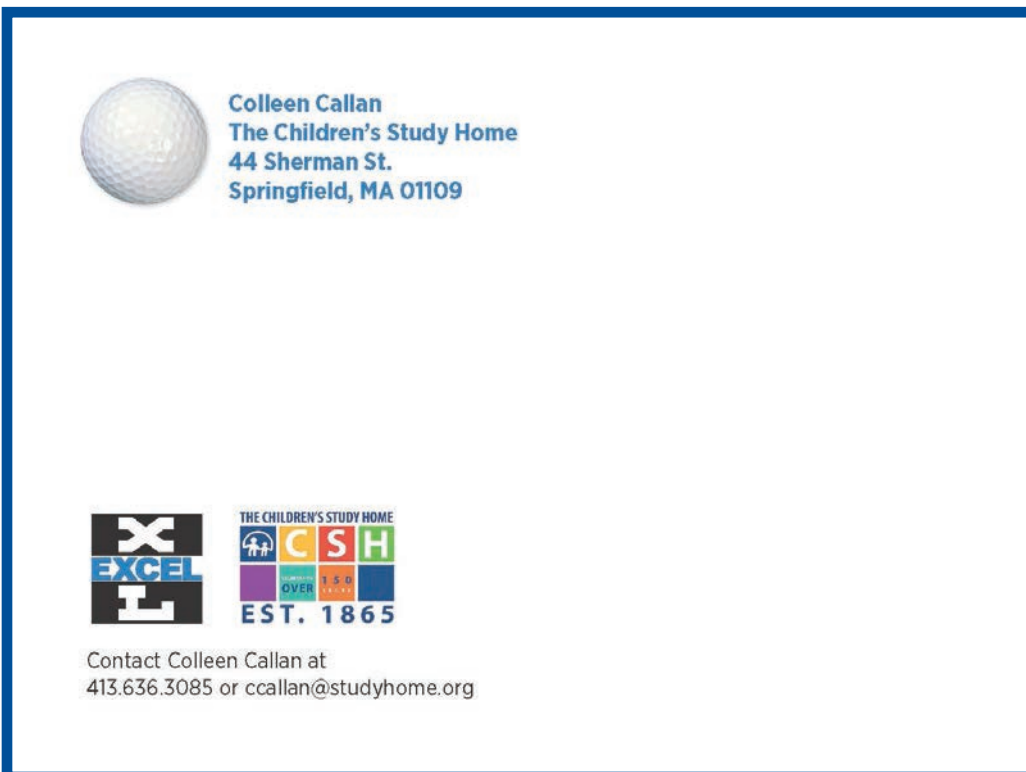
PRE-EVENT MARKETING COMMUNICATIONS

Save the Date Postcard #2

Front

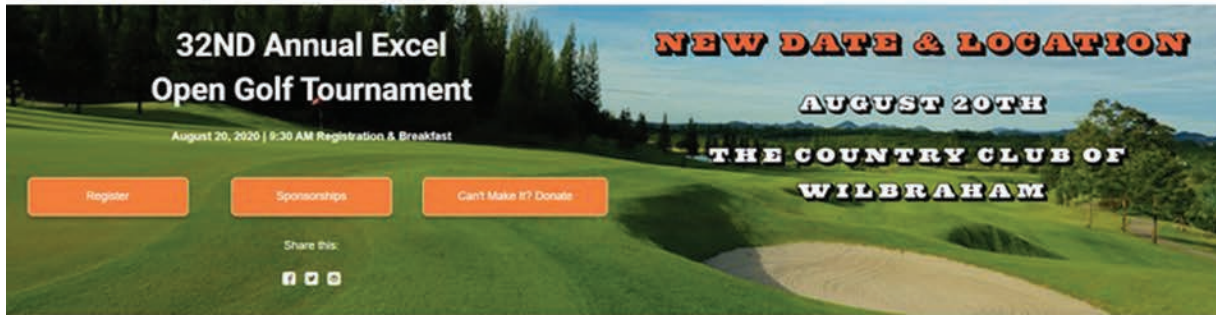


Back



PRE-EVENT MARKETING COMMUNICATIONS

Event Web Page (<https://studyhome.salsalabs.org/excelopengolf2020/index.html>)



We are looking forward to you joining us for our 2020 Excel Open Golf Tournament. This year's tournament signifies The Children's Study Home's thirty-second annual golf tournament.

Please attend as a sponsor, a player, or for the dinner at the reception, as this year we play, eat and come together in order to build a new pavilion behind the Administration Building at 44 Sherman Street for our children and families to enjoy the beauty of the outdoors for years to come.

We are pleased to announce that this year's exciting tournament will be held at a NEW Venue, the Country Club of Wilbraham.



On Course Competitions

Sponsored by Providence for Kids at the Tournament

Putting Contest = \$20/Team

Arm Length of 30" & One Mulligan = \$5

Each Additional Mulligan = \$5

Teaser Holes For 3 Golf Card = \$25/Person



Dinner Speaker Kara Wolters

Olympic, Gold Medalist, UConn National Champion, and IFMA Champion. Kara will bring her Olympic Gold Medal to take photos with the golf participants during cocktail hour at 4:20pm, followed by her speaking engagement during dinner at 5:00pm. [Click here](#) for more information on Kara Wolters.



Silent Auction & Raffles TBD

Schedule of Events

Registration and Grab & Go Breakfast
9:30 am

Shotgun Start
11:00 am

Cocktails & Optional Photos with Speaker, Kara Wolters
4:30 pm

Dinner, Speaker, Awards, Raffle Drawing, Closing
5:00 pm

[Add to Calendar](#)



New Location

The Country Club of Wilbraham
859 Stony Hill Road | Wilbraham, MA 01095



Can't Make It?

We are sorry that you can not attend this year's exciting golf tournament! Please consider making a donation to assist in building a new pavilion for our children and families.

[Make a Donation](#)

Last Year's Event



Many Thanks To Our 2020 Sponsors!



PRE-EVENT MARKETING COMMUNICATIONS

Email Invitation



The banner features the Excel Open Golf Tournament logo on the left, which includes a stylized 'X' and 'L' in a square, the word 'EXCEL' in a blue box, and 'OPEN' in large white letters with a blue flag above the 'O'. Below this is 'GOLF TOURNAMENT'. On the right, it says 'BENEFITING' above the logo for 'THE CHILDREN'S STUDY HOME', which consists of a grid of colored squares with icons and the text 'EST. 1865'. The central text reads '32ND Annual Excel Open Golf Tournament' in white on an orange background, with the date and location 'Thursday, August 20, 2020 at the NEW Venue Country Club of Wilbraham' below it.

We are so looking forward to you joining us for our 2020 Excel Open Golf Tournament. **This year's tournament signifies The Children's Study Home's thirty-second annual golf tournament.** Please attend as a sponsor, a player, or for dinner at the reception, as this year we play, eat and come together in order to build a new pavilion for our children and families. We are pleased to announce that this year's exciting tournament will be held at a **NEW Venue, the Country Club of Wilbraham in Wilbraham, MA on Thursday, August 20, 2020.**



Due to your generous contributions, last year we raised over \$32,000 to refurbish our three residential homes; The Cottage (males 6-13 years old), SHARP (Adolescent Residential Program for males ages 13-18) and START (Adolescent Residential Program for females ages 13-18).

In supporting this year's tournament, you will provide the opportunity for us to build a new pavilion behind the Administration Building at 44 Sherman Street for our children and families to enjoy the beauty of the outdoors for years to come. The Children's Study Home is a Trauma Informed/ Resiliency Focused Culture helping children and families heal and develop new skills. Our staff assess needs and develop individualized service plans that foster recovery, growth, and wellness. With your generous contributions we will create a comforting and uplifting outdoor atmosphere.



Please check out the [32nd Annual Excel Open Golf Tournament event page](#) for everything you need to be part of this special day; a foursome non-sponsor registration form, information about the tournament and [sponsorship opportunities](#). **The deadline for reserving foursomes and sponsorships is Monday, July 20th. If you would like more information, please feel free to contact Colleen Callan, at (413) 636-3085 or ccallan@studyhome.org.**

On behalf of all the children who benefit from this important tournament, thank you for your consideration and we look forward to seeing you on a sunny day in August.

Sincerely,

Leslie Fisher-Katz, Executive Director

PRE-EVENT MARKETING COMMUNICATIONS

Invitation Letter, Sponsorship, and Registration Forms Mailing



Hello!

We are so looking forward to you joining us for our 2020 Excel Open Golf Tournament. **This year's tournament signifies The Children's Study Home's thirty-second annual golf tournament.** Please attend as a sponsor, a player, or for dinner at the reception, as this year we play, eat and come together in order to build a new pavilion for our children and families. We are pleased to announce that this year's exciting tournament will be held at a **NEW Venue, the Country Club of Wilbraham in Wilbraham, MA on Thursday, August 20, 2020!**



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Please find enclosed everything you need to be part of this special day; a foursome registration form, information about the tournament and sponsorship opportunities. **The deadline for reserving foursomes and sponsorships is Monday, July 20th. If you prefer to submit the forms electronically, they can be found on the event landing page <https://studyhome.salsalabs.org/excelopengolf2020>.** If you would like more information, please feel free to contact Colleen Callan, at (413) 636-3085 or ccallan@studyhome.org.

On behalf of all the children who benefit from this important tournament, thank you for your consideration and we look forward to seeing you on a sunny day in August.

Sincerely,


Leslie Fisher-Katz
Executive Director


Tom Duke
Golf Committee Co-Chair


Pam Fernandes
Golf Committee Co-Chair


Colleen Callan
Golf Committee Coordinator

PRE-EVENT MARKETING COMMUNICATIONS

Invitation Letter, Sponsorship, and Registration Forms Mailing (Continued)



EAGLE SPONSOR \$5,000

Includes full-page recognition in our golf program, two foursomes, media recognition, eight dinner seats, signage on two holes, additional recognition on our website and banner signage on the course.

COMMUNITY ALLY SPONSOR \$3,000

Includes two foursomes, half page recognition in our golf program, media recognition, eight dinner seats, signage on a hole, additional recognition on our website and banner signage on the course.

DINNER SPONSOR \$2,000

Sponsor our dinner following the tournament. Includes a foursome, tent cards with sponsor logo at each table, signage on a hole and four dinner seats.

GOLF CART SPONSOR \$1,500

Includes a foursome, four dinner seats, recognition on each golf cart and signage on a hole.

GRAND FORE SPONSOR \$1,200

Includes a foursome, four dinner seats, signage on a hole.

EVENT SPONSOR \$2,500

Includes a foursome, media recognition, four dinner seats, signage on a hole, additional recognition on our website and banner signage on the course.

REFRESHMENT SPONSOR \$2,000

Sponsor the renowned refreshment tent parked in front of the clubhouse for the day. Includes a foursome, signage at the bus, four dinner seats and signage on a hole.

BREAKFAST SPONSOR \$1,500

Sponsor the morning breakfast before the tournament. Includes a foursome, four dinner seats, tent cards with sponsor logo at each table and signage on a hole.

FOURSOME SPONSOR \$760

Includes a foursome and four dinner seats.

NON-GOLFING SPONSORSHIPS

All sponsorships include recognition in our tournament program.

COURTESY BAG SPONSOR \$500

Sponsor logo will be featured on each courtesy bag, to be distributed to all tournament participants.

TEE/GREEN SPONSOR \$400

Includes signage on a tee or green.

PROGRAM SPONSOR \$300

Full-Page Ad

PHOTO SPONSOR \$600

Sponsor logo will be featured on each team photo distributed to all tournament participants.

PRIZE SPONSOR \$300

Sponsor will be recognized during tournament raffle.

CELEBRATION SPONSOR \$150

Sponsor will be listed in event program.

I will only attend the dinner following the tournament \$50

Please submit by July 20, 2020.

Questions? Please contact Colleen Callan at 413.636.3085,
ccallan@studyhome.org
44 Sherman Street, Springfield, MA 01109 Attn: Colleen Callan
Please make all checks payable to The Children's Study Home

Thank you for your support!



Company Name: _____

As it would appear in our program

Company Contact: _____

Phone: _____

Email: _____

IMPORTANT - Total number attending dinner:

PRE-EVENT MARKETING COMMUNICATIONS

Invitation Letter, Sponsorship, and **Registration** Forms Mailing (Continued)



REGISTRATION FORM

9:30AM Registration & Brunch
10:45AM Putting Contest
11:00AM Shotgun Start
4:30PM Cocktails
5:00PM Dinner, Speaker & Dessert, Awards, Raffle
Drawing, Closing

\$190 PER INDIVIDUAL
\$760 PER FOURSOME
Dinner Included

PLEASE FILL OUT COMPLETELY.

Sponsorship Contact or Team Captain: _____ Business: _____
Street Address: _____ City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
I will attend the Awards Dinner:

Player 1 Name: _____ Business: _____
Street Address: _____ City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
I will attend the Awards Dinner:

Player 2 Name: _____ Business: _____
Street Address: _____ City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
I will attend the Awards Dinner:

Player 3 Name: _____ Business: _____
Street Address: _____ City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
I will attend the Awards Dinner:

Please submit by July 20, 2020.

Questions? Please contact Colleen Callan at
(413) 636-3085, ccallan@studyhome.org
44 Sherman Street, Springfield, MA 01109 Attn: Colleen Callan
Please make all checks payable to The Children's Study Home
Thank you for your support!



PRE-EVENT MARKETING COMMUNICATIONS

Press Release Email

PRESS RELEASE:

Kara Wolters: Olympic Gold Medalist, UCONN National Champion, & WNBA Champion to Speak at CSH Golf Tournament in August

FOR IMMEDIATE RELEASE

Springfield, MA (June 23, 2020) – The 32nd Annual Excel Golf Tournament to benefit The Children's Study Home will be held at a NEW Venue, the Country Club of Wilbraham in Wilbraham, MA on Thursday, August 20, 2020. Registration and brunch will begin at 9:30am, with a shotgun start at 11:00am.

The Children's Study Home is pleased to announce that Kara Wolters, Olympic Gold Medalist, UCONN National Champion, & WNBA Champion, will speak at the August tournament. Kara was recruited to play at UCONN for Coach Geno Auriemma on a scholarship, and in 1995, with a 35-0 team record, she won an NCAA National Championship with the UCONN Huskies. Kara went on to become one of only nine players in the world to have the elusive "set"- NCAA National Championship (1995), WNBA Championship (1999) and an Olympic Gold Medal (2000). Kara was recently inducted into the Women's Basketball Hall of Fame in Knoxville, TN (2017). Today, Kara works as an in-studio analyst for the UCONN Women's Basketball games on Sports New York Television (SNY). She is also a motivational speaker, a coach to young players in the Connecticut Travel and AAU Programs, and provides her knowledge and skills coaching young athletes by offering private basketball lessons year-round and basketball camps for girls during the summer. Kara's full bio can be found at <http://karawolters.com/about-kara/>. Kara will bring her Olympic Gold Medal to take photos with the golf participants during cocktail hour at 4:30pm, followed by her speaking engagement during dinner at 5:00pm.

Kara Wolters comments, "I am excited and honored to be part of the 32nd Annual Excel Golf Tournament in August to benefit The Children's Study Home (CSH). CSH is a wonderful organization supporting local youth and families through a variety of residential, educational and family service programs. Throughout my career as a professional athlete, I learned the importance of creating positive atmospheres for youth and becoming their biggest cheerleader. It's all about supporting the youth and families of today to create a better future for all!"

In supporting this year's tournament, sponsors and participants will provide the opportunity for The Children's Study Home to build a new pavilion behind the Administration Building at 44 Sherman Street for the children and families to enjoy the beauty of the outdoors for years to come. The Children's Study Home is a Trauma Informed/ Resiliency Focused Culture helping children and families heal and develop new skills. Our staff assess needs and develop individualized service plans that foster recovery, growth, and wellness. With the tournament's generous contributions, The Children's Study Home will create a comforting and uplifting outdoor atmosphere.

Visit the 32nd Annual Excel Open Golf Tournament event page at <https://studyhome.salsalabs.org/excelopengolf2020/index.html> for additional tournament information, the foursome non-sponsor registration form, and sponsorship opportunities. The deadline for reserving foursomes and sponsorships is Monday, July 20th. For more information, please contact Colleen Callan, at (413) 636-3085 or ccallan@studyhome.org.

PRE-EVENT MARKETING COMMUNICATIONS

Deadlines Extended Email



The banner features the Excel Open Golf Tournament logo on the left, which includes a stylized 'X' and 'L' in a square, the word 'EXCEL' in a blue box, and 'OPEN' in large white letters with a blue flag above the 'O'. Below it is 'GOLF TOURNAMENT'. On the right, it says 'BENEFITING' above the logo for 'THE CHILDREN'S STUDY HOME', which consists of a grid of colored squares with icons and the text 'EST. 1865'. Below the grid, it says 'CELEBRATING OVER 150 YEARS'.

32ND Annual Excel Open Golf Tournament

Thursday, August 20, 2020 at the NEW Venue Country Club of Wilbraham
Sponsorship & Registration Deadlines Extended to Friday, July 24th!

We are so looking forward to you joining us for the **32nd Annual Excel Open Golf Tournament on Thursday, August 20th at a NEW Venue, the Country Club of Wilbraham in Wilbraham, MA.** Please attend as a sponsor, a player, or for dinner at the reception, as this year we play, eat and come together in order to build a new pavilion behind The Children's Study Home's Administration Building at 44 Sherman Street for our children and families to enjoy the beauty of the outdoors for years to come. **The Children's Study Home has extended the sponsorship and registration deadlines to Friday, July 24th!**



We are pleased to announce that Kara Wolters, Olympic Gold Medalist, UCONN National Champion, & WNBA Champion, will speak at the August tournament. Kara was recruited to play at UCONN for Coach Geno Auriemma on a scholarship, and in 1995, with a 35-0 team record, she won an NCAA National Championship with the UCONN Huskies. Kara went on to become one of only nine players in the world to have the elusive "set"- NCAA National Championship (1995), WNBA Championship (1999) and an Olympic Gold Medal (2000). Kara will bring her Olympic Gold Medal to take photos with the golf participants during cocktail hour at 4:30pm, followed by her speaking engagement during dinner at 5:00pm. For the full press release, [click here](#).

Please check out the [32nd Annual Excel Open Golf Tournament event page](#) for everything you need to be part of this special day; a foursome non-sponsor registration form, information about the tournament and sponsorship opportunities. **The NEW deadline for reserving foursomes and sponsorships is Friday, July 24th. If you would like more information, please feel free to contact Colleen Callan, at (413) 636-3085 or ccallan@studyhome.org.**

On behalf of all the children who benefit from this important tournament, thank you for your consideration and we look forward to seeing you on a sunny day in August.

Sincerely,

Tom Duke, Golf Committee Co-Chair

PRE-EVENT MARKETING COMMUNICATIONS

Facebook Posts

Childrens Study Home
May 12 · 🌐

Mark your calendars! The 32nd Annual Excel Open Golf Tournament to benefit The Children's Study Home is Thursday, August 20th. We are excited to hold the tournament at a NEW VENUE, The Country Club of Wilbraham! Please take a moment to check out the event page <https://studyhome.salsalabs.org/excelopengolf2020/index.html>



32ND ANNUAL EXCEL OPEN GOLF TOURNAMENT
PLEASE JOIN US ON.....
THURSDAY AUGUST 20, 2020
NEW DATE & VENUE!
The Country Club of Wilbraham
859 Stony Hill Road
Wilbraham, MA

ccallan@studyhome.org
TheChildrensStudyHome
@studyhome


THU, AUG 20
32nd Annual Excel Open Golf Tournament
Wilbraham
4 Went · 10 Interested

170 People Reached 3 Engagements Boost Unavailable

3 Likes

Rick Tremblay, Gerri-Ann Gallo and 4 others 3 Shares

The Children's Study Home
May 22 · 🌐



EXCEL OPEN GOLF TOURNAMENT
THURSDAY AUGUST 20, 2020
NEW DATE & VENUE!
The Country Club of Wilbraham
859 Stony Hill Road
Wilbraham, MA

ccallan@studyhome.org
TheChildrensStudyHome
@studyhome

THU, AUG 20
32nd Annual Excel Open Golf Tournament
Wilbraham
4 Went · 10 Interested

170 People Reached 3 Engagements Boost Unavailable

3 Likes

Childrens Study Home
June 24 · 🌐

The Children's Study Home is pleased to announce that Kara Wolters, Olympic Gold Medalist, UCONN National Champion, & WNBA Champion, will speak at the 32nd Annual Excel Golf Tournament to benefit The Children's Study Home! For more information on the tournament, please visit <https://studyhome.salsalabs.org/excelopengolf2020/index.html>.



EXCEL OPEN GOLF TOURNAMENT
THURSDAY AUGUST 20, 2020
NEW DATE & VENUE!
The Country Club of Wilbraham
859 Stony Hill Road
Wilbraham, MA

ccallan@studyhome.org
TheChildrensStudyHome
@studyhome

THU, AUG 20
32nd Annual Excel Open Golf Tournament
Wilbraham
You like The Children's Study Home

Interested

Childrens Study Home
July 22 · 🌐

We have extended the deadline to this Friday, July 24th for securing sponsorships and foursome registrations for the 32nd Annual Excel Open Golf Tournament on Thursday, August 20th! Please take a moment to check out the various sponsorship opportunities or if you would like to register a team at <https://studyhome.salsalabs.org/excelopengolf2020/index.html>.



EXCEL OPEN GOLF TOURNAMENT
THURSDAY AUGUST 20, 2020
NEW DATE & VENUE!
The Country Club of Wilbraham
859 Stony Hill Road
Wilbraham, MA

ccallan@studyhome.org
TheChildrensStudyHome
@studyhome

STUDYHOME.SALSALABS.ORG
32nd Annual Excel Open Golf Tournament
32ND Annual Excel Open Golf Tournament to be held on Thursday,...

2 Shares

PRE-EVENT MARKETING COMMUNICATIONS

Twitter Post



Instagram Post



AT-EVENT MARKETING COMMUNICATIONS

| Communication Method | Rationale | Target Audience | Measurable Goals | Assessment Method | Results | Recommendations |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Onsite Signage: <ul style="list-style-type: none"> • Excel Open Golf Naming Sponsor Banner • Event Sponsor Banners • Photo Sponsor Sign • Tee Sponsor Signs • Golf Cart Sponsor Sign • Breakfast Sponsor Table Tents • Dinner Sponsor Table Tents | <ul style="list-style-type: none"> • Create awareness and brand recognition • Create curiosity of sponsored companies | <ul style="list-style-type: none"> • All attendees • CCW staff and people driving by the course | No measurable goals set | Difficult to track, due to an observation only communication method | Not able to determine if this communication was effective | Create a QR code on signage to track those attendees who are interested in learning more about sponsors and send this information to sponsors post-event |
| CSH Brochures | Promote the organization's programs | <ul style="list-style-type: none"> • All attendees • CCW staff | Distribute 75 brochures | Count number of brochures before and after the show | Distributed 100 brochures | Continue to distribute printed collateral at the tournament |
| Golf Tournament Program | Promote sponsors, participants, CSH programs, Staff, etc. | • All attendees | Distribute 100 programs | Count number of brochures before and after the show | Distributed 100 programs | Continue to distribute programs at the tournament |
| Facebook, Twitter and Instagram At-Show Posts | <ul style="list-style-type: none"> • Showcase a great fundraising event for CSH • Create buzz • Cost effective method | <ul style="list-style-type: none"> • Past and present tournament players and sponsors • Social media followers | <ul style="list-style-type: none"> • 10 likes and/or shares on Facebook • 1 likes and/or shares on Twitter • 2 likes and/or shares on Instagram | Count likes and shares on Facebook, Twitter and Instagram | <ul style="list-style-type: none"> • 11 likes and/or shares on Facebook • 0 likes and/or shares on Twitter • 2 likes and/or shares on Instagram | <ul style="list-style-type: none"> • Continue to promote at-show events on social media • Create more posts to increase overall followers |

AT-EVENT MARKETING COMMUNICATIONS (p. 40-43)

On-site Signage

Excel Open Naming Sponsor Signage
Size: 60" w X 36" h



Event Sponsor Banner Example
Size: 60" w X 36" h



AT-EVENT MARKETING COMMUNICATIONS

On-site Signage (cont.)

Photo Sponsor Signage

Size: 46" w X 21" h



Tee Sign Sponsor Signage Example

Size: 24" w X 18" h



Golf Cart Sponsor Signage

Size: 11" w X 8.5" h



AT-EVENT MARKETING COMMUNICATIONS

On-site Signage (cont.)

Breakfast Sponsor Table Tent Signage

Size: 11" w X 4.5" h



Dinner Sponsor Table Tent Signage

Size: 11" w X 4.5" h



Brochures

Size: 4.5" w X 11" h



Golf Tournament Program

Size: 5.5" w X 5.5" h



AT-EVENT MARKETING COMMUNICATIONS

Facebook Post



Twitter Post



Instagram Post



Section 5: Management of Integrated Marketing Communications (IMC)

POST-EVENT MARKETING COMMUNICATIONS

| Communication Method | Rationale | Target Audience | Measurable Goals | Assessment Method | Results | Recommendations |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Facebook, Twitter and Instagram At-Show Posts | <ul style="list-style-type: none"> Showcase a great fundraising event for CSH Create buzz Cost effective method | <ul style="list-style-type: none"> Past and present tournament players and sponsors Social media followers | <ul style="list-style-type: none"> 10 likes and/or shares on Facebook 1 likes and/or shares on Twitter 2 likes and/or shares on Instagram | Count likes and shares on Facebook, Twitter and Instagram | <ul style="list-style-type: none"> 12 likes and/or shares on Facebook 1 likes and/or shares on Twitter 2 likes and/or shares on Instagram | <ul style="list-style-type: none"> Continue to promote post-show events on social media Create more posts to increase overall followers |
| Thank You Letter and Team/Speaker Photos Mailed | <ul style="list-style-type: none"> Show appreciation to participants Build loyalty Provide documentation for tax purposes | <ul style="list-style-type: none"> Players and sponsors | Mailed to 125 envelopes | Count envelopes returned by mail | No envelopes were returned | Continue to mail thank you letters and photos to participants |
| Survey Emailed | Determine areas of improvement for next year's tournament | <ul style="list-style-type: none"> Players and sponsors | <ul style="list-style-type: none"> Emailed to 125 Get 25 responses | Number of responses | Received 32 responses | Continue to send post-event surveys |

POST-EVENT MARKETING COMMUNICATIONS (p. 44-45)

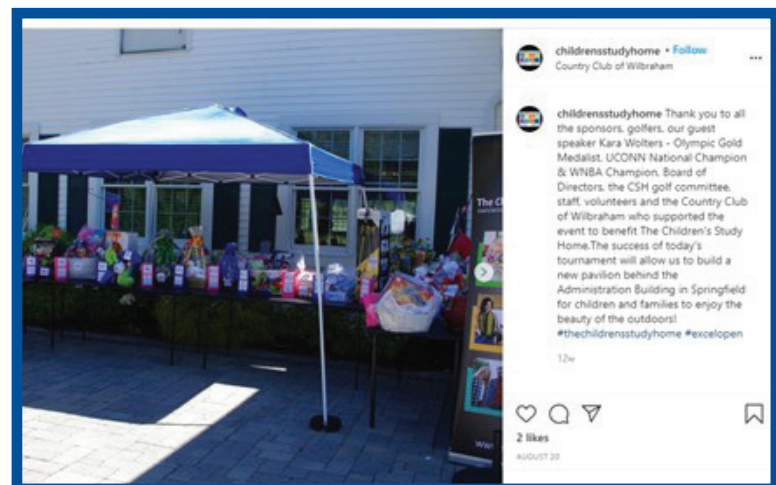
Facebook Post



Twitter Post

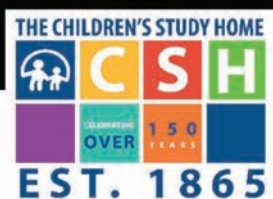


Instagram Post



POST-EVENT MARKETING COMMUNICATIONS

Sponsor Thank You Letter



Board of Directors 2020

President
Gordon Quinn

Vice President
John Pappas

2nd Vice President
Tom Duke

Treasurer
Brian Canina

Assistant Treasurer
Sean O'Connell

Clerk
Pam Fernandes

*Past President –
Emeritas*
Denis Gagnon

Past President
Mark Germain

Past President
Mike Talbot

Past President
Meg Beturne

Past President
Kandy Tranghese

Ryan Barry
Kimberley Broderick
Christopher Fager
Debbie Frangie
Darcy Fortune
Ed Garibian
Traci Talbert Gaynor
David Griffin
Jane Hetzel
John Morse
Cathy Rossi, Esq.
Karen Rossi
Elizabeth Simpson

*Interim Executive
Director*
Stephen Schaffer

September 2, 2020

Bailley Mazur
People's United Bank
One Monarch Street, 10th Floor
Springfield, MA 01144

Dear Bailley,

We want to thank you for helping us make The Children's Study Home 32nd Annual Excel Open Golf Tournament such a resounding success! We had a fantastic and fun filled day. In supporting this year's tournament, you will provide the opportunity for us to build a new pavilion behind the Administration Building at 44 Sherman Street for our children and families to enjoy the beauty of the outdoors for years to come. The youth and families in our programs thank you!

We are so very grateful for your willingness to support us this year through your Award Sponsorship in the amount of \$500.00. This sponsorship not only adds to the proceeds but adds to the celebratory experience for our participants. It will also allow us to create a comforting and uplifting atmosphere for our children and families. We are always looking for ways to improve what we are offering to those we serve. You are once again a big part of this effort!

Please keep The Children's Study Home in mind as we strive to have a successful Secret Santa Drive, Annual Appeal and all the upcoming events and volunteer opportunities. You are without a doubt, part of our family and you help make a difference to those children and families in need. Thank you for being willing to be a part of that difference!

Best,

Tom Duke
Golf Committee Co-Chair

Pam Fernandes
Golf Committee Co-Chair

Brenda Trierweiler
CFO

Colleen Callan
Marketing Manager

Please note: In accordance with IRS regulations, your gift to The Children's Study Home is tax deductible, based on The Children's Study Home's 501(c) 3 nonprofit status under Federal ID # 04-2105939. This tax-deductible value is based on the full market value of these assets, because The Children's Study Home has not provided you with any goods or services as a result of your donation.

The Children's Study Home
44 Sherman Street | Springfield, MA 01109 | t 413.739.5626 | f 413.732.5457
www.studyhome.org

**SECTION 6
MANAGEMENT OF
RESULTS REPORTING**

Section 6: Management of Results Reporting

RESULTS ON OBJECTIVES

Included in this section are the results from the objectives presented in Section 3. This was the first year that I managed all aspects of the tournament and tracked objectives. I also held a post-tournament golf committee meeting, where we reviewed the objectives and discussed tactics to improve future tournaments. Most of my objectives and goals were obtained; however, we discussed the following ways to continue to reach key tournament stakeholders and improve:

- Promote the tournament as early as possible to secure as many sponsors and attendees as possible, especially if we are still dealing with COVID-19.
- Improve marketing communications and social media tactics by creating a ‘social media sponsorship’ to pay for Facebook advertising.
- Increase brand awareness to include purchasing the “hot” giveaway for that year and ensure brochures are updated every six months, creating a fresh look for each large event.
- Maintain a satisfied customer experience, especially if we have to be a COVID-19 complaint tournament. It is important to make people feel safe, while still being able to attend events and enjoy life.

| Objective | Tactic | Assessment Method | Measurable Goals | Results | Recommendations for Improving |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| Tournament Profit | | | | | |
| Sponsors | Mail, email and post on social media the Save the Date postcard, and mail an invitation letter to previous sponsors. Both pieces to include the brand-new event website, which allows sponsors to sign-up online. | Track email opens and clicks through Salsa. Track confirmed sponsorships through the event website. | Mail 80 Save the Date postcards and 80 invitation letters to prior sponsors. | 50 Sponsors (2020) | Achieved this goal; continue to promote the tournament early. |
| | | | Secure more than 35 sponsors (2019), an increase of 10% for 2020. | | |
| | | | Email a series of 4 campaigns to over 250 contacts through Salsa | <ul style="list-style-type: none"> • Sent 1,006 emails through Salsa • Avg 99.21% Delivered • Avg 32.74% Opened • Avg 3.99% Clicked | Achieved this goal; continue to promote the tournament early. |
| Players | Mail, email and post on social media the Save the Date postcard, and mail an invitation letter to previous and new potential attendees. Both pieces to include the brand-new event website, which allows attendees to sign-up online. | Track email opens and clicks through Salsa. Track confirmed players through the event website. | Mail 120 Save the Date postcards and 120 invitation letters to prior attendees. | 100 Players (2020) | Achieved this goal; continue to promote the tournament early. |
| On Course Promotions | Increase on course promotion profit of the 50/50, Texas Holdem’ and putting contest by utilizing additional volunteers. | Results will be determined following the event by the Finance Department. | Sell: | Sold: | |
| | | | 50/50 - \$250 | 50/50 - \$550 | Achieved this goal; continue the 50/50 at future tournaments. |
| | | | Putting Contest - \$350 | Putting Contest - \$375 | Achieved this goal; continue the Putting Contest at future |
| | | | Texas Holdem’ - \$500 | Texas Holdem’ - \$1,120 | Achieved this goal; continue the Texas Holdem’ at future |

| Objective | Tactic | Assessment Method | Measurable Goals | Results | Recommendations for Improving |
|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Improve Marketing Communications | | | | | |
| Social Media | Gather 15 posts to the Facebook, Twitter and Instagram accounts prior to, during and after the tournament. | Track likes and shares | Receive 30+ likes through Facebook, Twitter and Instagram, tracked through both sites and Salsa Engage | 45 likes on Facebook, Twitter and Instagram | Achieved this goal; continue to promote on social media; consider paid advertising in 2021. |
| Identify potential improvements for the 2021 tournament | Complete and send post event survey to attendees, sponsors and volunteers. | Export survey responses and count # of unique responses | 40 responses | 32 responses | In the future or next year, send the survey out the week after the tournament; consider an incentive for people to complete. |
| Objective | Tactic | Assessment Method | Measurable Goals | Results | Recommendations for Improving |
| Increase Brand Awareness | | | | | |
| Giveaways | Hand out branded (CSH and bag sponsor logos) backpacks to all attendees. Each to include a sleeve of 3 golf balls, a branded golf towel and tees, a bottle of water and a snack bar. | Count event attendees and remaining inventory of purchased giveaways | Distribute 100 bags | 100 bags distributed (2 per golf cart) | Achieved this goal; continue this method. |
| Brochures | Hand out new CSH program brochures at registration | Count pre-event and post-event inventory levels | Distribute 75 brochures | 100 brochures distributed | Achieved this goal; continue this method. |
| Objective | Tactic | Assessment Method | Measurable Goals | Results | Recommendations for Improving |
| Maintain A Satisfied Attendee Experience During COVID-19 | | | | | |
| Registration | Follow social distancing guidelines; outside under a tent with 6' distancing lines | Set up 4 lines behind the registration tent | Registration line allows one team (4 people) at a time | Registration line allows one team (4 people) at a time | Achieved this goal; continue this method if COVID is still active in 2021. |
| Golf Carts | Each team of 4 is allowed 2 golf carts. If a team is not comfortable with 2 people in a cart, one person could walk or request another cart for \$85 | Count carts and attendees | Keep the number of carts below 58, as this is the total number of carts the course has on hand for the tournament. | 54 carts used for players and staff | Achieved this goal; continue this method if COVID is still active in 2021. |
| Catering | Due to COVID-19, in place of the breakfast and dinner buffets, a breakfast grab-and-go sandwich was provided and a plated dinner. New guidelines introduced on August 7 reduced outside event numbers from 100 to 50. | Since the event had 100 registered golfers, we divided the event into 2 catering contracts and 2 seating areas. | 50 attendees under the tent and 50 on the back patio | 50 attendees under the tent and 50 on the back patio | Achieved this goal; continue this method if COVID is still active in 2021. |
| Speaker Photos | Set up a stationary area on putting green for attendees wishing to take photos with Kara Wolters and her Olympic Gold Medal. The photo area was set up with the CSH banner stand between Kara and the attendee(s) to provide 6' distancing. | Based on the number of attendees that participate | 50 attendees to take photos with Kara Wolters | 25 photos taken | Goal not achieved due to COVID and players not comfortable being close to others. |

**SECTION 7
CONCLUSION**

32ND ANNUAL EXCEL OPEN GOLF TOURNAMENT

The 32nd Annual Excel Open Golf Tournament was a huge success! I was certainly challenged with managing an event during a pandemic. The frequently changing State guidelines kept me on my feet. The Board of Directors and senior management team were all very pleased with the tournament's execution. The sponsors and players gave outstanding feedback and look forward to next year's event. And for me, I learned that I could find ways to effectively solve issues that changed quickly, especially during a pandemic.

The new tournament location was amazing, and all our goals for the event were achieved! The golf pro, the course and catering clearly met our expectations, even during the challenging time of COVID-19. We plan to have next year's tournament at the Country Club of Wilbraham and have already set the date for August 20, 2021!

I am pleased to report that we passed the 2019 tournament proceeds of \$30,000, making the total raised over \$37,000 this year. In fact, this year's tournament had the highest profit in 32 years! The organization can now follow through with building a new pavilion behind the Administration Building at 44 Sherman Street, thereby meeting the goal we set for our children and families. The pavilion is estimated to cost \$30,000 to \$40,000.

EVENT IMPROVEMENTS

Like many other organizations, The Children's Study Home was affected by the pandemic. We had to cancel four out of six events in 2020, resulting in a significant profit loss for the organization. As we near the end of 2020, we remain positive that COVID-19 restrictions will lessen in 2021 so we can begin holding our key stakeholder events again. I have also been discussing with senior management the possibility of holding virtual events. There are several benefits to virtual events:

- Less expensive – The overall cost of putting on a virtual event is less expensive, due to saving on staff, venue, set-up and take down, attendees' hotels, meals, travel costs, etc. The virtual meeting platform would be one of the only costs.
- Saves time – Although virtual events do require some set-up time (e.g., event website, registration, event marketing, promotion, etc.), it is tremendously less than that of an in-person event. Also, no travel time is required.
- Flexible and variable – Because virtual events take place online, there is flexibility on how the event is broadcast. Options include multiple guest speakers in remote locations, sessions can be interactive, or even in different languages.
- Make connections – Virtual events tend to be faster-paced since attendees do not have to move around a physical event. It can be easier to make connections with other attendees and speakers. And since everything is online, attendees can easily record important information, such as names, titles, etc., on their computer.
- Collect feedback – Since attendees are online for the duration of the virtual event, they can easily answer real-time polls or surveys. Not only does this real-time feedback help presenters gauge how their session is going, but it is also useful in measuring the overall success of the virtual event.

EXHIBITOR EXPERIENCE

I began my CTSM certification in 2012, when I attended EXHIBITORLIVE in 2012 and 2013. I completed all the required classes in 2013 and successfully passed the test in 2014. Attending EXHIBITORLIVE was not only beneficial for my career, but overall, an amazing learning experience of new and rejuvenating trade show and marketing techniques from some of the best experts, authors, and thinkers in the world. In addition, I have met many colleagues who have become friends and continue to utilize many EXHIBITORLIVE vendors and contacts.

Due to various job transitions that focused more on email marketing, graphic design, press relations, etc., I was not able to begin my CTSM portfolio until this year in my current position at The Children's Study Home. I am thankful for the support of senior management of The Children's Study Home in completing my CTSM portfolio and allowing me to focus my portfolio on the organization's flagship golf tournament. When I began my portfolio in 2019, I never imagined that I would have to utilize all my trade show and marketing skills on one event, but also an event that had to totally be reconfigured due to a pandemic. With each passing week, the tournament had to change plans and comply with new State restrictions. I successfully overcame all the challenges and created one of the most impressive and profitable events in my career. I look forward to continue using the skills gained through the CTSM program in future events that I will manage.

Following the completion of my CTSM portfolio, I decided to start my own marketing and event consulting company. Throughout the process of completing my portfolio and focusing on every aspect of marketing, I see a real need for a consulting company in the small community and region that I live in. In **509 Getting Started in Consulting - Things to Consider**, I learned that with focus and the yearn to thrive, a person can accomplish any goal. It just takes dedication, time, and self-motivation to succeed. I am ready to begin this new and exciting journey of my career!

Special thanks to my CTSM advisor, Heidi Zipfel, for the guidance and knowledge that she showed through the entire CTSM portfolio journey. Her expertise provided me a solid foundation for success and excitement to continue my journey in the trade show and marketing industry.

The knowledge I have gained at the CTSM program and EXHIBITORLIVE has truly helped me take my career to the next level! Now that's a hole in one!

REFERENCES

| REFERENCES | | |
|------------|---------------------------------------------------------------------|---------|
| Session | Title | Page |
| 516 | Show and Tell: Presenting Yourself Professionally | 2 |
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