

MEASURE UP




SkillsUSA[®]
Service Tool Kit



WELCOME

At SkillsUSA, we believe in making a difference in the communities where we live and work—by engaging dedicated volunteers in service events that help develop civic leadership and pride, and by finding opportunities to use our skills, resources to become Champions of Service.

We're very proud to partner with Timberland PRO, who shares our ongoing commitment to service, along with our belief that civic engagement is the highest form of leadership. Since our partnership began in 2002, Timberland PRO has hosted the Day of Service at the National Leadership & Skill Conference in Kansas City and supported civic engagement events in many other states, with more than 6,100 students serving some 35,000 hours of community service.

This Service Tool Kit has been created from the firsthand experience of Timberland PRO® and SkillsUSA to help you develop and execute meaningful service events from start to finish. We have included information to help you get organized, recruit and manage volunteers and deliver superior results for your community.

Throughout the text we refer to different worksheets and appendices that can help you plan and execute service events. Both groups of files can be found on our website and are stored on the CD-ROM included with this kit.

At SkillsUSA, we believe that becoming a professional does not stop with acquiring a skill, but also involves an increased awareness of the meaning of good citizenship. We trust that the well-tested organizing principles found in this Kit that Timberland PRO has helped to create for us will provide you with the tools you need to contribute your skills and strengths to your local community.

Yours in service,

SkillsUSA

Table of Contents

CLICK ON ORANGE TEXT BELOW TO LINK DIRECTLY TO THE CORRESPONDING SECTION IN THE DOCUMENT.

- 1.0 DEFINE PROJECT PARAMETERS**
 - 1.1 Identify Vision, Goals and Scope of Project
 - 1.2 Establish a Budget and Prepare a Plan
 - 1.3 Recruit the Operations Team

- 2.0 RESEARCH COMMUNITY NEEDS AND ASSETS**
 - 2.1 Internet Research
 - 2.2 Community Outreach
 - 2.3 Recognize Community Assets
 - 2.4 Use a Request for Proposal (RFP) Process

- 3.0 SELECT SERVICE PARTNERS**
 - 3.1 Conduct First Site Visit
 - 3.2 Use Available Tools to Assess Partner
 - 3.3 Review Partnership Agreement and Clarify Expectations

- 4.0 DEVELOP PROJECT**
 - 4.1 Define Clear Objectives
 - 4.2 Complete Service Partner and Roles and Responsibilities Checklists
 - 4.3 More Key Steps
 - 4.4 Plan for Safety
 - 4.5 Metrics

- 5.0 MANAGE WEEK OF EVENT EXECUTION**
 - 5.1 Communicate Your Plan
 - 5.2 Manage the Operations Team

- 6.0 MANAGE THE DAY OF SERVICE**
 - 6.1 Coordinate On-Site Arrival of Volunteers
 - 6.2 Welcome and Kickoff Program
 - 6.3 Manage Volunteers
 - 6.4 Close Out Your Project

- 7.0 EVALUATE, DOCUMENT AND CELEBRATE**
 - 7.1 Aggregate Event Surveys
 - 7.2 Conduct Operations Team Debrief
 - 7.3 Complete After-Action Report
 - 7.4 Send Thank-You Letters to Participants and Partners

PLANNING TIMELINE

The timeline below will guide you through the sequence of steps involved in planning a service event. The stages of this timeline correspond with the organization of this tool kit and the related appendices.

STAGE	OBJECTIVE	CORRESPONDING TOOLS	TIMING*
1.0	DEFINE PROJECT PARAMETERS		3-6 MONTHS OUT
1.1	Identify Vision, Goals and Scope of Project		
1.2	Establish a Budget and Prepare a Plan	Sample Budget Worksheet 1	
1.3	Recruit the Operations Team	Roles and Responsibilities Checklist... Worksheet 2	
2.0	RESEARCH COMMUNITY NEEDS AND ASSETS		2-5 MONTHS OUT
2.1	Internet Research		
2.2	Community Outreach		
2.3	Recognize Community Assets		
2.4	Use a Request for Proposal (RFP) Process	Sample RFP Worksheet 3	
3.0	SELECT SERVICE PARTNERS		2-3 MONTHS OUT
3.1	Conduct First Site Visit	Service Partner Checklist Worksheet 4	
3.2	Use Available Tools to Assess Partner	Site Visit Scorecard Worksheet 5	
3.3	Review Partnership Agreement and Clarify Expectations		
4.0	DEVELOP PROJECT		1-2 MONTHS OUT
4.1	Define Clear Objectives	Site Visit Scorecard Worksheet 5	
4.2	Complete Service Partner and Roles/Responsibilities Checklists	Service Task Planner Worksheet 6	
4.3	More Key Steps		
	Complete Tools and Materials List	Tools and Materials List Worksheet 7	
	Develop Tool Delivery and Storage Plan	Tool Sorting Plan Worksheet 8	
	Develop Catering and In-Kind Donation Plan		
	Implement Recruitment Plan		
	Develop Media Plan		
	Develop Transportation Plan	Transportation Plan Worksheet 9	
	Develop Kickoff/Celebration Speaking Program		
4.4	Plan for Safety	Emergency Response Plan Worksheet 19 Safety Tips Appendix 1 Injury Reporting Form Appendix 2	
4.5	Metrics	Metrics Sheet Worksheet 10	
5.0	MANAGE WEEK OF EVENT EXECUTION		WEEK OF EVENT
5.1	Communicate Your Plan	Service Day Schedule Worksheet 11	
	Distribute Local Media Alerts	Media Alert Appendix 3	
	Communicate Volunteer Deployment Plan	Volunteer Deployment Plan Worksheet 12	
5.2	Manage the Operations Team	Prep-Work Plan Worksheet 13	
	Team Leader	Team Leader's Service Day Checklist Worksheet 14	
	Logistics Coordinator		
	Project Director Coach	Project Director's Service Day Checklist... Worksheet 15	
6.0	MANAGE THE DAY OF SERVICE		DAY OF EVENT
6.1	Coordinate On-Site Arrival of Volunteers	Volunteer Registration Form Worksheet 16	
6.2	Welcome and Kickoff Program		
6.3	Manage Volunteers		
6.4	Close Out Your Project	Volunteer/Service Partner Surveys Worksheet 20	
7.0	EVALUATE, DOCUMENT AND CELEBRATE		WITHIN 2 WEEKS OF EVENT
7.1	Aggregate Event Surveys	Survey Aggregate Form Worksheet 17	
7.2	Conduct Operations Team Debrief	Operations Team Debrief Worksheet 18	
7.3	Complete After-Action Report	After-Action Report Appendix 4	
7.4	Send Thank-You Letters to Participants and Partners		

* Planning time required will vary depending on the size, complexity and importance of your event.

1.1 Identify Vision, Goals and Scope of Project

The first step in planning a successful service event is to define the basic vision, goals and scope of the project. What type of event is best suited to achieve the outcomes your organization desires? If you are planning a departmental service project, you may want to ensure team-building occurs during the project. If you are planning an Earth Day project, you may seek an environmentally relevant project to transform the physical surroundings of an outdoor space. Perhaps the needs of your group require that you look for a nonphysical service project — one that has volunteers serve and interact with the elderly, with animals, with children or with the homeless.

To determine possible projects for your organization, you will need to research and meet with community agencies to identify their needs. Before you meet, the chart below offers some useful questions that will help you determine your project's vision, goals and scope:

WHY

- What community needs do you want the project to address?
- What emotional connection to the cause being addressed might volunteers have?
- Are you looking to extend the project's impact by engaging in ongoing volunteer activities?

WHAT

- What are the goals of the project? Be sure to consider all the different outcomes you hope to achieve as a result of your event.
- What type of service are you most interested in doing? Indoor/outdoor, painting/landscaping, environmental, elderly, homeless, etc.
- What budget and other resources can you dedicate to the project?

WHEN

- What is the date of the event?
- What are other key deadlines that will impact the project?
- How much time can you commit to research, plan and execute the service event?
- How many hours do you have to complete the project on the day of the event?

WHO

- Who is confirmed to work with you on this project—on your Operations Team?
- How much time do you and these team members have to give to this project?
- What type of Service Partner do you want?
- Whose input do you need concerning community needs and resources?
- What external guests, if any, will be invited to serve (customers, suppliers, vendors, family members)?
- What unique skills/experience does your group possess that you can offer to the community?

WHERE

- Do you have travel parameters? (e.g., project has to be within a 20-minute drive)
- What locations are accessible and meet your group's needs?

1.2 ESTABLISH A BUDGET AND PREPARE A PLAN

1.2 Establish a Budget and Prepare a Plan

For quick reference, review the Planning Considerations chart below to examine what resources are needed for full-day events of various sizes:

PLANNING CONSIDERATIONS

EVENT SIZE Smaller events engage departments, business units and customers in meaningful service to the community	Medium events such as company conferences and/or branded events engage large groups of stakeholders	Large, highly leveraged and branded events engage large and varied groups of stakeholders
TOTAL NUMBER OF VOLUNTEERS 25-100	100-300	300-1000+
OPTIMAL LEAD TIME 2-4 months	4-6 months	6-10 months
NUMBER OF PROJECT DIRECTORS REQUIRED 1	1-3	3-15
RATIOS OF TEAM LEADER : VOLUNTEER 1:10	1:15	1:15
NUMBER OF HOURS TO PLAN AND EXECUTE 10-200	200-800	800-4,000
COST CONSIDERATIONS: Service T-shirts, tools/materials, food, water/snacks, transportation, etc.		

You will need to budget appropriately for the size and scope of your event. A simple way to prioritize time and money for your project is illustrated in the graphic on the right.



These three elements are connected. If you have limited time, for example, you may need to spend a little more money and recruit a larger team of leaders to manage the event. If you have less money than time you may want to develop an outreach plan for in-kind donations. Work with your Service Partner to secure lunch donations and discounted rates for tools. Review a prospective budget with your Service Partner and decide where they might be able to lend their support. Maximizing your collective resources is essential to effective project planning.

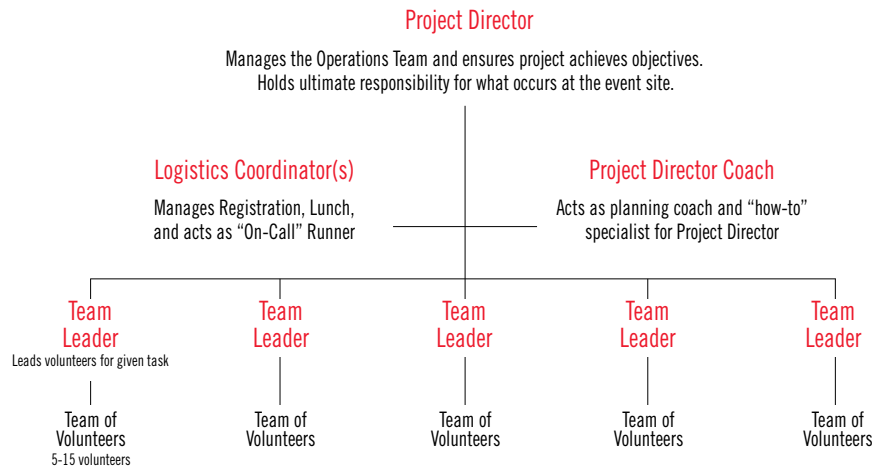
TIPS

In-Kind Donations for Lunch: One easy way to keep costs down for your event is to have lunches donated. Service Partners appreciate the opportunity to thank volunteers.

1.3 Recruit the Operations Team

To implement a service project, you first need to recruit a Project Director. The Project Director leads a team of individuals to produce and execute a meaningful service event. To drive a successful event, a Project Director must have creativity, initiative, attention to detail and people skills.

The Project Director identifies the talent required to execute the service project with distinction. The Project Director's job is not to do all the work—it is to identify and marshal resources. To that end, we recommend that early in the planning process the Project Director recruit a team that follows the structure of the chart below.



Position Descriptions

PROJECT DIRECTOR

The Project Director (PD) is the leader of the service event. The Project Director will:

- research needs and assets in the community
- select a Service Partner
- define a clear set of measurable objectives
- define the parameters of the project
- develop and implement a project timeline and plan
- manage week of event logistics and execution
- evaluate, document and celebrate the impact made

We recommend Project Directors learn as much about their project work as possible. Local do-it-yourself building centers offer helpful guides specific to executing different types of projects. Local libraries are also a good source for reference guides.

PROJECT DIRECTOR COACH

A Project Director Coach (PDC) possesses the kind of experience (i.e. they have led many projects before) and/or expertise (i.e. building trades, project management) that will provide the Project Director with the support needed to effectively lead a service project.

The Project Director will meet regularly with the PDC to discuss the development of the service project plan. The Project Director will update the PDC on progress regarding securing of supplies and planning for volunteer deployment and health and safety concerns.

1.3 RECRUIT THE OPERATIONS TEAM

Ideally, the PDC will join the Project Director on the first site visit. If that is not possible, the Project Director and PDC will arrange a time to walk the site together. The better the Project Director keeps the PDC in the loop, the better advice the PDC will be able to provide. The PDC will be of particular assistance when the Project Director needs to develop the Service Task Planner (Worksheet 6) and Tools and Materials List (Worksheet 7).

LOGISTICS COORDINATOR

Logistic Coordinators (LCs) will play a critical role on the Operations Team. They will help the Project Director by managing the registration process on the day of service and the food/snack/beverage procurement and distribution. On large projects, LCs also manage bus transportation and development of communication materials providing volunteers with directions and other information about the project site. LCs also have an important role as “runners” to address needs that arise unexpectedly. For example, if a volunteer gets injured, LCs can either transport the individual to the local hospital or arrange for an emergency vehicle. Another example might be if more tools are required, LCs can make a quick run to the local hardware store to purchase the needed supplies. *It is best to have one LC for every 25-30 volunteers.*

TEAM LEADER

For every major service task (i.e. planting a garden, painting a room) the Project Director will appoint one Team Leader (TL) to lead a team of 5-15 volunteers who will work on that task.

The Project Director will manage the Team Leaders on the day of service and their role is critical to the success of the project.

Team Leaders will:

- collect and organize all tools needed for the task
- communicate with and manage their team of volunteers from start to finish
- orient the team on how to execute the task assigned to them
- manage the cleanup process
- facilitate the end-of-day debrief with team
- ensure all team members fill out and return end-of-day surveys
- ensure all team members get back to designated area for the end-of-event celebration

Team Leaders join the effort closer to the event date. Their role is purely tactical. Beyond the labor involved in helping prep the project site, Team Leaders implement the plan that the PD and the PDC have developed. The following tasks are appropriate duties for Team Leaders:

- sort tools by team
- help with all outstanding “week of event” tasks
- lead designated team of 5-15 volunteers on the day of event
- manage the distribution and collection of volunteer surveys for respective teams

If you do not have an existing relationship with a Service Partner or if you want to work with a new partner, consider the steps in this section as you begin your research.

Partner research can start in many ways. Consult with community leaders who work for local institutions and businesses. Search the Internet. Read community newspapers for ideas. Consult with local government officials or chambers of commerce. Visit the community and ask for input from community members along the way. How you begin will depend on your particular style and comfort level. We recommend, however, that you use *at least three* of the strategies mentioned above to get a well-rounded view of the community before choosing a project.

2.1 Internet Research

Search the Internet for local coordinating agencies. In the U.S., these may include United Way sites, Volunteer Action Centers, VolunteerMatch.com or other volunteer search engines. These will vary depending on what region or country you research.

Search the Internet by issue and location. For example, if you are looking to find a project focused on housing needs in Stowe, Vermont, type in: Housing + Vermont and see what you find. Follow any links leading to agencies or governmental departments addressing that issue. Call and email those groups for more information.

Search the Internet for socioeconomic data for a given community. In the U.S., you can search census sites for basic information but keep in mind that chambers of commerce, school departments, police stations and other local governmental branches will often have more up-to-date statistics for employment rates, testing scores, school lunch program percentages and other demographic information. In other countries, you may want to start by contacting the local government. Armed with this information you can search for local stories from online news sources and research common themes and issues in the community.

2.2 Community Outreach

While it might make sense to start with the Internet to research the community you wish to support, you should always talk to people in the community. Once you have identified some key resource people in your community, it's time to ask them a lot of questions:

- what are the critical needs in the community?
- what is being done to address those needs?
- who is doing that work?
- what agencies should we contact, given the expertise we might offer (volunteer time, specific skills of your group)?
- what other community leaders should we contact regarding our project research?

Never leave a phone conversation or face-to-face meeting without getting other leads to follow. The more information and the more leads you have, the better positioned you are to apply your resources and make a difference.

2.3 Recognize Community Assets

Communities are webs of interactions between individuals and institutions. Knowing how these bodies connect will help drive your research and will ultimately put you in a position to help convene resources from multiple sources.

“Asset-map” your community to understand “who’s who” and how they connect to one another. Not only will the map help you plan your current service event, but it will also save valuable time when you start the process the next time. To “asset-map” a community, create a simple chart to track the people leading the following institutions:



Questions to consider:

- How do these institutions interact with each other?
- What community initiatives link them (i.e., communities often have committees that meet to address different pressing issues)?
- What role does each institution play in the community?
- What are the needs and strengths of each group?

Here are some tips for how these groups might be of value to you as you plan your project:

Schools might coordinate a group of children to volunteer at your event, provide meeting space or offer you a wide range of indoor and outdoor project ideas. Schools may also have community-based initiatives under way involving teachers, children and parents.

Local Parks Associations, whether managed by a governmental “Parks and Recreation” department or through a private charitable trust, may offer you service opportunities and great venues to convene large groups of people. Note: Often City Parks Departments can loan you tools and provide expertise to help you execute your project.

City and Town Halls and local government representatives can help navigate community needs, provide introductions to leaders from different local agencies and help secure in-kind donations for tools or lunch.

Faith-Based Organizations including churches, mosques, synagogues and other religious congregations tend to be involved with volunteer efforts. Religious centers often provide communities with their space for nonreligious activities like food banks, town meetings, after-school programs and other enrichment activities for children that support the broader community.

Volunteer Associations, such as local Volunteer Action Centers in the U.S., may exist in the community and are extremely helpful guides for researching needs, connecting you to potential service partners and helping you manage your event.

Local Media (i.e. community newspapers or online sites) provide information about the community and often have a calendar of ongoing and upcoming events or initiatives.

Health Centers or Hospitals often act as community hubs for health-related issues ranging from HIV/AIDs to cancer to programs for sick children or for the elderly. They also often act as central hubs where local information is posted and where you can identify volunteer opportunities to work with patients in need of support.

Local Businesses and Local Chambers of Commerce can be helpful by identifying pressing needs and providing you with introductions to local agencies. They can also assist you with in-kind donations for tools and lunch. Heads of local business groups are also good resources for project ideas.

Large Corporations near the community offer opportunities to collaborate on local volunteer efforts. Cross-referencing their lists of local nonprofit grantees will provide you with project leads. Don’t forget to invite their employees to serve with your team.

The Nonprofit Sector—while unique to each community—is usually made up of organizations that meet a variety of pressing community needs. As you explore nonprofit organizations in your community, also remember to seek out and contact any nonprofit associations that convene volunteers. These associations often match the abilities and interests of volunteers with the current needs of local organizations and can save you time as you identify possible service opportunities.

2.3 RECOGNIZE COMMUNITY ASSETS

Housing Developments (or affordable housing associations) often provide services to local populations. They may manage educational centers that need a coat of paint or recreational areas that need repair. They may even offer opportunities to conduct landscaping and other beautification projects.

Fire and Police Departments tend to be involved in the community beyond their obvious functions. Because they interact regularly with local nonprofits, these groups are great sources of information about the community and local leaders.

2.4 Use a Request for Proposal (RFP) Process

Consider using a Request for Proposal (RFP) process to identify local projects. This can work well if you have enough time to manage the process. Worksheet 3 provides a sample RFP that Timberland has used in the past.

Employing an RFP process to solicit project proposals requires:

- Time (at least a couple of months) to distribute, review, select the partner and then plan and execute the project.
- A distribution network. You may have your local Volunteer Action Center, United Way, chamber of commerce or government department send it out to their contacts, or you may randomly mail the RFP to a select number of agencies you target yourself.
- A plan for how you will review and select the proposals. Who will make selection decisions if you receive over 20 applications? Will you select the best three applications and then conduct site visits to decide on the final selection?
- Criteria for making your selections.
- A system in place for responding to every proposal with letters either accepting or declining the opportunity. Bear in mind that by sending out an RFP you will automatically create expectations and raise the hopes of local nonprofits. You will need to diplomatically manage those applicants whose proposals are declined.

Once you have gathered enough information on the community, you are ready to schedule site visits with potential Service Partners. Identifying strong Service Partners with the appropriate type of work for your group and the right capacity to help you develop the project is essential to your success.

3.1 Conduct First Site Visit

Gather information about potential Service Partners by visiting their sites. Always arrive at your meeting with an agenda. It will keep you on track and will communicate your mission and goals to your potential partner.

First Site Visit Discussion Agenda (Sample)

Date _____
Agenda _____

- 1** **Introductions**
- 2** **Your Service Plans**
 - Share goals for service event
- 3** **Project Vision**
 - Review agency mission and long-term plan
 - How would service provided meet critical needs?
 - How would it be sustained?
- 4** **Review potential projects tasks**
 - Fill out Service Task Planner
 - Tools and expertise needed
- 5** **Next Steps**
 - Deadline for making decisions
 - Other next steps?

Inspect the location and assess whether or not the agency has enough work to meet the needs of your volunteers. Spend time looking around the potential project site and take stock of all of the possible tasks that your team can perform.

The biggest challenge in planning a service event is estimating the time needed for each task and the number of people needed to complete each task. Make sure that each volunteer has enough work so they will be busy all day.

TIP

Remember that it is better to have too much work than not enough.
Plan auxiliary projects so you can re-deploy volunteers if needed.

3.2 Use Available Tools to Assess Partner

The Service Partner Checklist (Worksheet 4) will provide you with the means to evaluate the potential for impact, employing our three themes of *critical need*, *transformational service* and *sustainability* to frame your thinking.

Critical Need

What needs will be addressed?

What makes them “critical” needs?

How can you measure the degree to which these needs are met?

Transformational Service

What physical transformation will occur through this project?

How is the work compelling on an emotional level for volunteers?

How is the service transformational to the nonprofit agency?

Sustainability

How will your work be sustained?

How will the project allow for further needs being met by the agency?

How might your volunteers continue to be involved with the project?

Complete Service Task Planner

As you examine the potential project site, note the potential work projects for your group. The Service Task Planner (Worksheet 6) provides you with a task-by-task template to estimate the number of volunteers required, steps involved, timing and prep-work involved. It is a simple tool to ensure you capture, in detail, the full potential of the site. If it helps you review your thoughts, consider taking photos of the site.

Complete Site Visit Scorecard(s)

The Site Visit Scorecard (Worksheet 5) provides a framework for assessing a potential partner's compatibility with your organization. Fill out a Site Visit Scorecard for each agency you visit. If you have multiple projects from which to choose, this form will help you decide which partner to select. Regardless, the information gathered using this form will force you to think carefully about the kind of impact possible with the agency under consideration.

The Scorecard will compel you to define Specific, Measurable, Action-oriented, Realistic and Time-bound (SMART) project objectives. Defining SMART objectives will enable you to measure a clear set of success indicators for your work.

See next page for the elements to consider before selecting a Service Partner.

If you feel the agency meets the criteria in the Scorecard—and is best suited to serve your group's purpose—then you are ready to select your partner. Be sure to manage expectations for the partners not chosen.

Elements to Consider When Selecting a Service Partner

Mission

Does the agency have a strong track record of excellence and accountability in the community?

Capacity

Does the agency have the experience, infrastructure and resources to support a service event effectively? In particular, is your chief contact—the service liaison—an effective planner and communicator?

Commitment / Familiarity

Beyond having the capacity to use your help, is the agency excited to work with your organization? Long-time community partners may be more likely to understand your goals and objectives. Is the agency familiar with your goals and objectives?

Reach / Relevance

Is the agency's agenda relevant to current needs in the community and does it involve a plan for leveraging a coalition of groups to achieve results? Is your service plan with this agency potentially scalable beyond this project? Can it be expanded and replicated?

Service Opportunities

Does the agency have enough transformational projects in mind for your volunteers to do (e.g., planting flower beds, building trails)? Does the agency have a plan for sustaining the work after the event?

3.3 Review Partnership Agreement and Clarify Expectations

Once you select your Service Partner, get to know them. Identify *one contact person* and develop a positive relationship from the start. The more you learn about your Service Partner, the better able you will be to meet their needs and communicate to your volunteers the impact of their work.

It is important to meet with your contact and clarify expectations between organizations. Using the chart below, begin to frame a working understanding about the responsibilities of each party involved.

YOUR GROUP WILL PROVIDE:	YOUR SERVICE PARTNER WILL PROVIDE:
<p>Volunteers to work on the project</p> <p>Project Management of all service activities, including project prep-work plan (with input from service partner)</p> <p>PR Communications (as needed)</p> <p>Money for tools and supplies (as budgeted)</p> <p>Local business and civic contacts (as applicable)</p> <p>For projects that require technical expertise, you will work with the Service Partner to recruit the necessary support (preferably from the surrounding community)</p>	<p>Information about organization and critical needs being addressed</p> <p>Staffing on the day of service</p> <p>Recruit additional resources as needed (financial, in-kind, tools, supplies, lunch, community support)</p> <p>An inspirational speaker for the service kickoff to help frame the context of project</p> <p>Time collaborating with you to ensure all details are addressed including at least 2 site visits (between 5 and 15 hours depending on size of project)</p> <p>Post-event partner surveys</p>

Once you have chosen your Service Partner, it will be time to design your plan. Like all good plans, start with a clear understanding of your key deliverables.

4.1 Define Clear Objectives

Review the proposed project objectives with your Service Partner. Are they specific, measurable and realistic? How will your activities on the day of service achieve the desired outcomes? What is your timetable for implementing the project?

Seek Projects that Achieve Impact

It may be unrealistic to assume that you can achieve long-term, systemic change in a one-day service event. Approach your planning with the knowledge that the most impactful projects are those that meet *critical needs* in *transformational ways* and achieve *sustainable results* for your Service Partner.

It is important to think about these guidelines as you plan your event. There are needs that, while important to your Service Partner, may not be truly critical. Likewise, there are service projects that may address critical needs but may not be transformational enough to inspire profound and continued engagement from volunteers.

Critical Needs: Volunteers must understand why the needs of the project are critical and that their work is important. Ideally, volunteers will have an emotional connection to the service they perform. If they know little about the agency or cause before the day of service, it is imperative that the event is designed in a way that allows volunteers to feel and touch the impact of their service.

For example, a service project to pack food boxes at a food pantry might be accented by an event kickoff by a family member receiving the food, by a video describing the people the food feeds or through the sharing of statistical information about how many people will be fed due to the group's volunteer work.

Transformation: When we talk about meeting critical needs in “transformational ways” we mean that partners, volunteers and other participating community members will *physically transform the space* while *emotionally engaging* with the issues and work at hand.

Sustainability: We aim for whatever work we perform to *build upon previous efforts*, to have a *clear maintenance plan* and to position the partner to *extend the impact* of the work beyond a single day of service. Sustainability plans may include efforts to engage your group in continued and ongoing service.

TIP

Volunteers sometimes feel they have made more of a difference when they witness huge physical transformation on their project (e.g. house build, landscaping, etc.). Human-related projects may lack that visual impression but they can still conjure up the same degree of emotion and pride if planned and communicated in a way that illuminates a clear set of pressing needs.

SMART Objectives

When planning service projects it is easy to become focused on the tasks at hand rather than on the desired outcome. Especially when you plan one-day service events, you may feel as though there really is no way to make a sustainable impact. Creating Specific, Measurable, Action-oriented, Realistic and Time-bound (SMART) project objectives will drive the accountability of your Operations Team and will infuse the day with a clear sense of purpose. Below is an example of SMART objectives.

EXAMPLE – PLAYGROUND BUILD AS CATALYST FOR SUSTAINABLE COMMUNITY INVOLVEMENT

Over 100 local volunteers, from 2 schools, 1 church, 5 nonprofits and the surrounding 20-block radius plan and build a 40-square-foot playground in a neighborhood park. This will result in:

- over 300 children in the neighborhood, aged 4-16, having access to a safe place to play
- over 75% of participants stating they are more predisposed to stay involved with this planning group
- fund-raising over \$30,000 for the playground installation and subsequent park improvements

This project is more than an event—it is a process through which local citizens build stronger community ties.

4.2 Complete Service Partner and Roles and Responsibilities Checklists

Once you have chosen your Operations Team, your partner and your project goals, it is time to develop and implement the project plan.

COMPLETE SERVICE PARTNER CHECKLIST

The Service Partner Checklist (Worksheet 4) will cover the basics of your project. Reviewing this document with your Service Partner will ensure you have a plan to:

- communicate the Service Partner's mission and the importance of the project to that mission
- transport volunteers and provide best directions to project site
- identify key locations for site kickoff, celebration, restrooms, etc.
- procure lunch and set up lunch location and staffing plan
- involve community members
- procure tools and expertise required for the project

Discuss the flow of the day and identify outstanding issues. Do you need any permits from the local town to approve the work? What is the plan for prepping the site prior to the day of service? Who is driving what piece of the plan?

Continue to reference the Service Task Planner (Worksheet 6) to help plan each of the tasks and to prioritize the work to be done. Pay particular attention to the section on prep work. Be sure to plan adequately to ensure all team members know what prep work will happen, when it will happen and who is responsible.

Who will supply lunch for your volunteers? It is not uncommon for lunch and tools to be donated for service events. Work with your Service Partner to get in-kind donations from local stores and restaurants. Enlist the help of your partner in contacting community agencies for donations.

UPDATE THE ROLES AND RESPONSIBILITIES CHECKLIST

The Project Director should leave the second site visit with a clear plan for who is in charge of what activities, a completed Roles and Responsibilities Checklist (Worksheet 2), a clearly laid out project design plan and a timeline detailing when tasks are to be completed.

The Roles and Responsibilities Checklist (Worksheet 2) is a simple template to provide your Operations Team with a common reference tool to review as you assign planning tasks. Alter this template to suit the needs of your project.

4.3 More Key Steps

You are about to enter the most work-intensive period of your project planning. The following key steps will help you stay on course.

COMPLETE TOOLS AND MATERIALS LIST

Determine who will supply the tools and materials. Discuss what tools are needed to accomplish each task and complete the Tools and Materials List (Worksheet 7). You will need to review your Tools and Materials List with your Project Director Coach to ensure you have fully anticipated all potential supply needs.

Having enough tools will be a key factor in the success of your service day. Plan for having too many. You may not use them all but that is far better than having frustrated volunteers because they lack the proper tools to accomplish their tasks.

Contact local stores (paint, landscape supply, hardware, etc.) to get the tools and materials you require. Allow plenty of time to ensure that suppliers have everything you need in stock.

DEVELOP TOOL DELIVERY AND STORAGE PLAN

When will you order your tools and materials? Who is taking the lead on this task? Conduct an in-depth discussion about any project design plans, (i.e. the landscape plan complete with plants required and locations for raised beds) and the timing and strategy for getting this work completed in advance of the service day. The better you prepare your service plan, the better your tools list will be. Make sure you have a plan for when and where the tools and materials (i.e. lumber, mulch) can be delivered, safely stored and collected at the end of the service day. Tools should be delivered to your project site at least three days in advance of your project to allow your Operations Team to sort them by team and task and to ensure that nothing is missing.

To sort and store the tools, you will need a large room or storage shed that can be locked at night to safeguard against theft. Materials can arrive the day before—or even the day of—the event if you feel confident in your supplier's ability to fill your order correctly. Use the Tool Sorting Plan (Worksheet 8) to organize tools and materials according to task.

DEVELOP CATERING AND IN-KIND DONATION PLAN

Plan to have snacks, water, beverages and lunch available for all attendees. Make sure that volunteers have enough water and food to sustain their energy and enthusiasm for the duration of the project. If volunteers are getting to your site early in the morning, you should have light fare and coffee available. Plan for one snack per volunteer (i.e. granola bar or fruit) and two or three water bottles per person. It is best to store drinks in large buckets of ice placed in several locations around the site.

For lunches, we recommend asking your Service Partner to help secure reduced rates or in-kind donations from local vendors. Also remember to consider that some volunteers may prefer vegetarian, kosher or vegan meals. Plan for about 10-20% of such meals to be available. Provide an accurate head count and special meal requests to the vendor well in advance of the service day. If you have to spend money for lunch, make sure you have forecasted for the expense.

IMPLEMENT RECRUITMENT PLAN

Ensure that you have designated someone to lead the outreach efforts for the specific groups you want to involve. Decide what is the chosen method of recruitment and if you will send information via email or using an online registration management system. Determine who is best positioned to engage civic and corporate partners and what deadlines you have set for recruitment efforts.

See Appendix 5 for an example of a Volunteer Project Briefing. It is important to inform people about the context and importance of their work in advance.

Set weekly goals and confirm the volunteer count with each leader. You should have a confirmed list of attendees at least one week in advance of the event.

DEVELOP MEDIA PLAN

If you determine that your service event is newsworthy, work with the communications team at your organization for advice regarding the best way to reach out to the media to promote your event.

DEVELOP TRANSPORTATION PLAN

Develop a Transportation Plan (Worksheet 9) to ensure everyone involved has a way to get to and from the site on the day of the event. When the number of volunteers is confirmed, you will be able to gauge how many people are driving to the project, taking public transportation or are interested in riding with other volunteers on a chartered bus. Remember to provide everyone with directions to the site and specify a meeting place. If you are using a hired bus company or vans, get the drivers' direct mobile phone numbers so they can be reached at any time.

4.3 MORE KEY STEPS

DEVELOP KICKOFF/CELEBRATION SPEAKING PROGRAM

Develop a plan for the kickoff program and an after-service celebration. Find a location that fits a large group of volunteers, conveys the meaning of your project and is central for volunteer deployment. Also check that you have an adequate sound system so that volunteers will hear the people speaking. You may need to secure the space through permits or rope off the area with police approval to ensure the group's safety.

Designate a person to lead the kickoff. Also arrange for a spokesperson from your Service Partner to welcome volunteers to their site. This person will provide the context for why the work will matter and will thank the volunteers in advance for their work.

As a rule, the speaker you choose—whether from your Service Partner or from the local community—should be able to speak passionately and succinctly about the impact you seek to achieve through service. A powerful speaker can set the right tone and make or break the volunteers' service experience. *Remember, you have only one opportunity to set the appropriate mood to ensure volunteers feel inspired and emotionally connected to the purpose of the day.*

Early in your planning process, begin to identify and secure speakers to engage community leaders' in your kickoff and end-of-service celebrations. Contact potential speakers far in advance of the service day and be sure to have a back-up plan in case someone cancels at the last minute.

4.4 Plan for Safety

PROJECT SELECTION AND SAFETY

Safety is a key concern when you select and plan service projects. Work that requires high skill levels usually puts volunteers at higher risk. If projects include large equipment, working at heights, electrical work, heavy construction, tree work or other hazardous tasks, seek advice and expertise from local professionals to ensure safety at your site.

Do not allow any operation you feel is unsafe to continue. Immediately identify and correct any hazards that may cause injuries.

REVIEW THE FOLLOWING POINTS REGARDING SETTING UP A SAFE SERVICE PROJECT.

Personal Protective Equipment

The event site must have ample supplies of personal protective equipment such as safety glasses, face shields, multiple types of protective gloves (leather, cloth and vinyl), hearing protection and hard hats. Ensure proper equipment is on-site for all tasks required to complete the project.

Power Equipment

If power tools are needed to complete your service project, assign only trained and experienced volunteers to these tasks. Prior to service day, designate the people who will use power tools and ensure they are properly trained on the safe operation of the equipment they will use.

Town Services

Contact local emergency dispatchers a day or two prior to the event. Provide basic details of your event such as the location and address, overview of the project and the number of volunteers that will be on-site during the event. This will ensure they have adequate notice and they will be in a better position to help you should you need to call them during the event.

Emergencies

Be prepared for an emergency. Refer to the Emergency Response Plan (Worksheet 19) – to review procedures in the case of a medical or other emergency.

First Aid

The worksite should have first aid kits available (one for every 50 people). Any participants trained in first aid should identify themselves to their Project Director.

Emergency Response Plan

As a safety precaution, it is essential to collect information about the nearest available hospital *prior* to your service day. *Also be sure to have at least one first aid kit at your site for every 50 volunteers*, as noted above. Team members should know where to locate this information and the first aid kit at the event site.

Most incidents can be avoided if you plan for safety. Problems are prevented if common sense is applied and rushing is avoided. For a list of safety tips, see Appendix 1.

Should an incident occur, use the Injury Reporting Form, Appendix 2.

4.5 Metrics

Measuring the impact of a service event through quantitative data collection and analysis provides insight into what did or did not work in the planning and execution of the project. In addition, the feedback gathered from participants and partners becomes a valuable tool in communicating the positive impact made in the community and evaluating and improving the process with each successive service event.

Use the Metrics Sheet (Worksheet 10) to record information about the event, including the:

- number of employees and guests who served (for verification, use the registration lists that were confirmed when volunteers arrived at the service project)
- number of collective hours served
- activities performed and materials used

Because you will be in the midst of so much activity on the day of your service event, we recommend you complete as much of the Metrics Sheet as possible *prior* to the event by recording all the materials purchased for the project. If any materials remain unused at the end of the event, deduct what remains from the totals recorded on the sheet.

The Metrics Sheet not only stores information about your project, it organizes the information so it can be added to data gathered from other projects. As you combine measurements across different projects, you will be able to identify and communicate richer stories about the difference you made.

In addition to these quantitative measures, we recommend that you and your Service Partner establish other milestones that may be relevant in determining the success and impact of the project. Your Service Partners are the experts on the needs of their communities and are best positioned to evaluate the ongoing contribution of the service you provide. If you work with a partner to build a community playground, for example, over time your partner will have information about how many children and families use it and how frequently they visit.

See below for a suggested flow of the week, assuming a Thursday service project. Though not a comprehensive list, the following chart will give you an idea of how to execute final details during the week of your service event.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<ul style="list-style-type: none"> • Print Registration Lists • Complete Team Leader Kits • Orient the Operations Team • Confirm Bus Schedule • Buy Gifts for Service Partner • Distribute Media Alerts 	<ul style="list-style-type: none"> • Prepare the Site for Service • Purchase Final Tools • Review Project Schedule with Service Partner • Complete the Plan for Distributing Surveys 	<ul style="list-style-type: none"> • Complete Service Prep • Sort Tools by Team • Prepare Deployment Lists • Rehearse Kickoff 	<ul style="list-style-type: none"> • Project Director Reviews Service Day Schedule • Team Leaders Review Service Day Schedule • LEAD SERVICE • Debrief • Store Tools / Garbage • Collect Surveys 	<ul style="list-style-type: none"> • Collect Tools • Debrief with Service Partner • Collect Service Partner Survey

5.1 Communicate Your Plan

We recommend you develop a very detailed Service Day Schedule (Worksheet 11). The document will outline who is responsible for specific tasks, when the tasks need to be performed and where they will take place. Update the document on a regular basis throughout the planning process. Be certain to make all final changes to this document and to distribute the final version to your team to ensure everyone has current and accurate information for the day of the event.

DISTRIBUTE LOCAL MEDIA ALERTS

See Appendix 3 for a standard Media Alert used by Timberland. Be sure to provide the scope of your service and the reasons why the event matters to the audience of the media outlet.

COMMUNICATE VOLUNTEER DEPLOYMENT PLAN

Share your Volunteer Deployment Plan (Worksheet 12) with participants in advance of the event to help them prepare for what is expected of them on service day. Provide details about who is on their team, what their tasks will be on service day and any specifics related to their task (such as “bring painting clothes and garden gloves” to the project site).

On event day, post alphabetized Team Lists in a central gathering place. This will serve as a quick reference and helpful reminder for anyone who may have forgotten the number or title of their assigned team.

TIP

Visit your local photocopy center a week in advance of the service event to enlarge and photocopy your Team Lists. Get lists mounted on poster board for a more effective display.

5.2 Manage the Operations Team

The Team Leaders and Logistics Coordinators play critical roles on the day of service. We recommend that the Project Director conduct an Operations Team orientation one or two weeks before the event. This is the time to make sure Operations Team members understand their responsibilities and are trained in specific tasks prior to the event.

TEAM LEADERS

Team Leaders need to review all pertinent logistical and service-related elements of their projects. It is important for the Project Director to spend adequate time (often at least an hour) walking everyone through the Project Director's Service Day Checklist (Worksheet 15) so that each Team Leader understands his or her role throughout the day.

We recommend that you compile a **Team Leader Kit** and distribute it to all Team Leaders. In the Team Leader Kit, be sure to include the following important information:

- the Service Day Schedule
- the Service Partner's history and information
- clear breakdown of the Team Leader's role
- a description of the project (including pictures/schematics of the site)
- any 'how-to' information pertaining to their particular project task
- safety information
- a Team Leader's Service Day Checklist (Worksheet 14) which serves as a day-of-event reminder for Team Leaders regarding what to do when

The Project Director must also review with the Team Leaders how to get their teams started on the day of the event. The basic points the Team Leader must communicate to the team throughout the day include the following:

- the Service Day Schedule
- safety concerns
- the location of the first aid kits, snacks, water and restrooms

LOGISTICS COORDINATORS

One week before the event, Logistics Coordinators need to organize volunteer deployment lists, confirm and secure catering services and confirm scheduled arrivals and departures. The day before the event, all surveys, waivers and paperwork must be organized according to plan. On the day of the event, Logistics Coordinators will be responsible for the following:

- purchase bags of ice for water stations around the project site
- set up registration tables, set up deployment signs and prepare paperwork
- set up snacks and water stations
- set up for and manage lunch
- be "on-call" for needs as they arise

PROJECT DIRECTOR COACHES

Project Director Coaches will help Project Directors oversee the service prep plan. The skills of the coaches will be needed throughout the week as prep-work proceeds.

Remember that service projects cannot be perfectly scripted. The better you anticipate and plan for potential problems, the better you are able to handle them well.

Event day is a time for being decisive, upbeat and solution-oriented. No matter what happens, it is imperative that the Operations Team's demeanor be confident and personable. People will follow that attitude. The answer to any emerging challenge must be: "Okay, let's handle it."

To ensure that you are fulfilling your responsibilities on service day, refer to your Project Director's Service Day Checklist (Worksheet 15).

6.1 Coordinate On-Site Arrival of Volunteers

On the morning of the event, volunteers should report to a designated area where they can sign in. The Logistics Coordinators need to make sure that each volunteer:

- signs in at registration
- signs a waiver
- is assigned to a task team
- receives a name tag (make sure you have enough pens, markers and name tags for the whole group)

6.2 Welcome and Kickoff Program

A powerful kickoff is important to set the right tone for your event. Based on your group's personality, you will need to decide how best to structure a brief but relevant speaking program. Open the program by thanking everyone for coming. Be sure to review the top two or three goals you have for the day; and one or two key statistics that reflect the importance of the work you are about to do. Introduce your Service Partner and have him or her thank the participants and explain the community need that will be met by their help.

With all attendees assembled in one place, review the timetable of the day (i.e., "we will serve from now until 12:30 when we will break for lunch. We will then resume service until we meet again here in this spot at 3:30 in the afternoon..."). Ask people to work hard and safely and, most importantly, to work together as a team.

Ensure you have an orderly process to group work teams in specific areas. For example, at large events have all Team Leaders in front of the group with Team Leaders holding a sign with a team number. Ask teams to follow their Team Leader out to their project site in the order called (the project with the farthest distance to walk is called first).

6.3 Manage Volunteers

The Project Director should stay in regular contact with the Team Leaders to make sure the day runs smoothly and stays on schedule. At a minimum, the Project Director will touch base with each Team Leader prior to the start of service and two hours before cleanup time to see if there is anything they need. See Team Leader's Service Day Checklist (Worksheet 14).

6.4 Close Out Your Project

After completing much of the hard work to plan and execute great service, many people forget their work is not yet complete. In order to place the event in its full context, a thoughtful closing is required. Gather all volunteers for a brief closing. Plan to have the Project Director or the Service Partner say a few words to leave the volunteers with a clear sense of what they accomplished.

DISTRIBUTE SURVEYS

Once the teams have completed their service and stowed their tools, the Team Leaders will distribute post-service surveys to their teams of volunteers (Worksheet 20). Volunteer comments and reactions provide useful information for developing future service events. We recommend that the Logistics Coordinators organize envelopes or plastic folders in advance with enough surveys and pens or pencils for each team.

FEEDBACK

At the closing gathering, Project Directors can invite some of the volunteers to share their service experience with the group. Ask for representatives from different teams to report briefly on the work they performed.

EXPRESS THANKS TO THE TEAM

The Project Director must thank all participants for their hard work, especially the Service Partner. Ask the Service Partner to say a few words about how the results from this project will help the agency to serve the community. Think about a creative and meaningful gift that can be given to your Service Partner as thanks for supporting your event and for all they do to support the community.

7.1 Aggregate Event Surveys

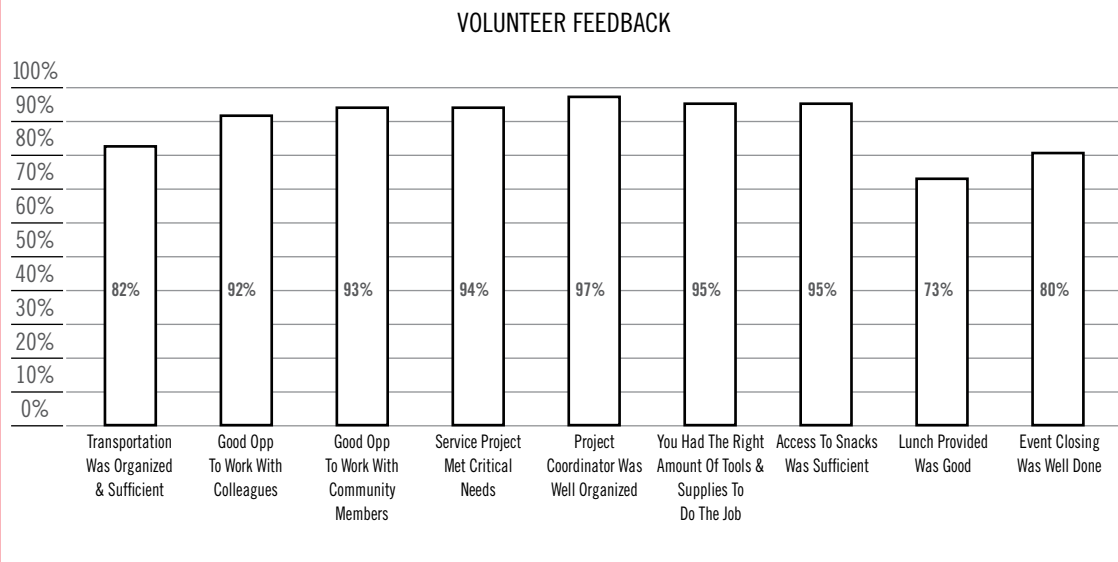
Whatever strategy you employ to distribute post-event surveys to your volunteers and your Service Partner, it is important to aggregate the responses and chart the findings as soon as possible (Worksheet 17). We strongly recommend that you invest the time to measure your effectiveness in the eyes of participants and Service Partners. It will improve planning for your next event.

Use these charts to identify key trends, successes and opportunities for improvement.

EXAMPLE #1

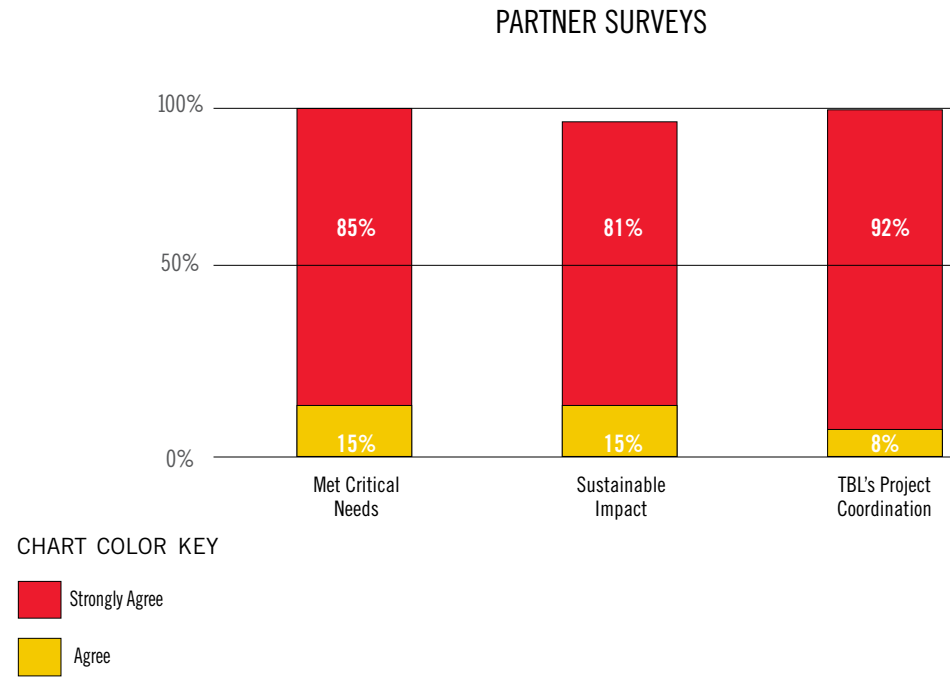
A mean average rate of 88% agreed or strongly agreed with key quality measures (sampling includes surveys).

- 56% of participants rated their service experience as a 9 or 10 (“best ever”) in comparison to past events (on 1-to-10 scale)
- 456 participants surveyed identified themselves as first-time volunteers



EXAMPLE #2

Service Partner(s) surveyed concluded the project met critical needs through well-organized and sustainable project(s) (mean average of 99% of respondents agreeing or strongly agreeing with statements below).



Sampling of Partner Responses

ON MEETING CRITICAL COMMUNITY NEEDS

“The extensive all-facility landscaping, installed walkways for the disabled, murals painted and bank installation saved us nearly \$20,000 in outside contractor costs. Nearly 100 volunteers made an incredible difference.”

ON ACHIEVING SUSTAINABLE IMPACT

“This has given the town a tangible product for our long-range plan to revitalize our riverfront park and walk.”

ON PROJECT COORDINATION

“I am very impressed by your (Team Leaders) and (Project Director). Teams operated independently with a clear vision provided by team leaders. Especially in light of the size of the project and knowing this was the director’s first project. We are over the moon about the amount of work that was done!”

7.2 Conduct Operations Team Debrief

Take stock of your accomplishments, assess what still needs to be done and celebrate the impact the team has achieved. We recommend that you circulate, collect and aggregate a version of the Operations Team Debrief Survey (Worksheet 18). Once each member of the Operations Team has responded and the Project Director has charted key trends, we recommend that the Project Director conduct a one-hour debrief as a team. The purpose of this debrief is to:

- review the volunteer and partner survey data
- identify the strengths and weaknesses of the planning process
- surface any outstanding work that needs to be completed
- celebrate as a team the impact achieved and each Operations Team leader's role in that success

Compile feedback from this debrief and document the findings for the after-action report to ensure continuous improvement for the next project you lead.

7.3 Complete After-Action Report

Once the Operations Team has compiled the Survey Data and conducted the Operations Team Debrief, the Project Director can complete the event After-Action Report (AAR). The purpose of the AAR is to document successes and map lessons learned for the next project. Regardless of the size, scope and importance of your project you will want to share the findings with all who participated—volunteers, business partners and Service Partners.

In Appendix 4, you will find an example of an AAR. There are a number of other ways to frame your report. Here are some basic items to cover:

- executive summary of highlights and objectives accomplished
- a Civic Engagement Chart—breakdown of groups engaged, hours served
- project task accomplishments
- before and after photos
- volunteer and Service Partner survey data
- recognized opportunities or lessons learned

7.4 Send Thank-You Letters to Participants and Partners

Make sure to send thank-you notes with the AAR attached. Reference steps for any work outstanding after the event.

CD-ROM CONTENT

APPENDICES

1. Service Safety Tips
2. Sample Injury Reporting Form
3. Sample Media Alert
4. Sample After-Action Report
5. Sample Volunteer Project Briefing

WORKSHEETS

1. Sample Budget
2. Roles and Responsibilities Checklist
3. Sample Request for Proposal
4. Service Partner Checklist
5. Site Visit Scorecard
6. Service Task Planner
7. Tools and Materials List
8. Tool Sorting Plan
9. Transportation Plan
10. Metrics Sheet
11. Service Day Schedule
12. Volunteer Deployment Plan
13. Prep-Work Plan
14. Team Leader's Service Day Checklist
15. Project Director's Service Day Checklist
16. Volunteer Registration Form
17. Survey Aggregate Form
18. Operations Team Debrief
19. Emergency Response Plan
20. Volunteer/Service Partner Surveys

We invite you to send us your feedback so we can make future editions of this Service Tool Kit more helpful in encouraging and supporting organizations as they plan their own service events. Please send your comments and suggestions to: anyinfo@skillsusa.org

SkillsUSA
P.O. Box 3000
Leesburg, Virginia
20177-0300
www.skillsusa.org

Service events and the procedures and forms related thereto (including without limitation participant waivers and releases) are subject to laws and regulations that may vary by location. The information in this tool kit is meant to provide general guidance and Timberland makes no representation or warranty with respect to compliance with applicable laws. Be sure to check with counsel and local authorities about your event.



Service events and the procedures and forms related thereto (including without limitation participant waivers and releases) are subject to laws and regulations that may vary by location. The information in this tool kit is meant to provide general guidance and Timberland makes no representation or warranty with respect to compliance with applicable laws. Be sure to check with counsel and local authorities about your event.