

# VOAz Project and Event Management Guide OUTLINE

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## Project And Event Management Guide

### GETTING STARTED

This guide includes tasks usually done by the Project Leader and Event Manager *at the start of a new project and/or event*. It covers both field and website work associated with this process. The **Task List** at the website provides a dated check list of these tasks.

Thus this documentation contributes to *VOAz's risk management program*. The safety of volunteers and protecting the organization and volunteer leaders from charges of negligence is of paramount concern. While the likelihood of adverse legal consequences arising from an event-related experience is very small - and there are laws protecting volunteers - it is not zero.

This guide is quite detailed, but all Project Leaders and Event Managers should be familiar with the *FAQ* page under About VOAz at the web site.

### Time and Expense Tracking

It is vitally important for all volunteer leads to keep a record of time spent prior to and following each event. All of your pre-and post- event volunteer hours and those of other volunteer leads need to accurately recorded in the Post Event Report.

### VOAZ Website – [www.voaz.org](http://www.voaz.org)

The VOAz website is “dynamic” which means that users can interact with the site in ways that change the site in real time, as when you register for an event and the site adds you to a roster and initiates confirming email messages. Dynamic sites use web-based databases. Unlike database software on your local computer, your entries on the VOAz web site will not be saved until you hit a “submit” on the page. You can also lose your data if you do not make any entries or saves for a few minutes. It thinks you fell asleep or went for coffee and “times out.” After you login you can access the pages that allow you to control what the public sees and how they can interact with the site both before and after they login.

**If you make any changes to any pages on the VOAz website, they will not be saved until you click the "Submit Information" button at the bottom of the page. This rule applies to all data entry pages.**

*If the website crashes while you are entering or editing information*, you should see a yellow screen with largely unintelligible markings. Please cut and paste that info into an email to [admin@voaz.org](mailto:admin@voaz.org), to help with troubleshooting.

## Project And Event Management Guide

### BEFORE THE EVENT – Phase 1

#### Project Memo of Understanding (MOU)

The *Project MOU* provides the framework for preparing an *Event MOU*. It is prepared after a project has been accepted as suitable for VOAz to undertake. This document contains contact information, project goals, and the allocation of responsibilities among the project partners.

VOAz MOUs are not legal documents. They represent the good faith commitments of VOAz and its project partners. VOAz uses a MOU at both the project and event levels because we typically are responsible for much more than delivering volunteers that the host then provisions and supervises. The MOUs also remind our partners of the work involved in producing successful events. We do not use MOUs when we do contracts.

The Project MOU template is under *Event and Project Management* at the [Docs, Forms, and Links](#) page.

#### Site Assessment

Most projects are associated with a single site—the base camp or trailhead where volunteers gather and the walk or drive to work starts. However, a few will have more than one site and a site could be associated with more than one project.

Site assessment for a new project should start with a determination of whether an existing suitable site is already in the database. Check under Sites.

#### *Sanitary facilities*

VOAz requires adherence to appropriate sanitary facility standards for every event. Here is what VOAz means by "appropriate":

- *Primitive camping with fewer than 10 volunteers* - Pit toilet set up by VOAz or cat holes, depending on the environmental conditions. Standards for these methods are published at the web sites listed below.
- *Primitive camping with 10-15 volunteers* - Pit toilet or better.
- *Primitive camping, developed camp grounds, urban sites with more than 15 volunteers* - portable toilets or better. The number of units depends on the size and duration of the event. Consult with the provider of the service and the host.
- *Host standards, if they are higher than the above.*

**Hosts are expected to cover the cost of sanitary facilities.** The [Forms, Docs, Links](#) page has links to web publications on human waste management in the outdoors and information on portable toilet service providers only updated as used).

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### Site Visit

Make a site visit early in the planning process. If possible, the first site visit should include the host and the VOAz Project Leader & TA and the Event Manager. The purpose of a site visit is to gather enough information to complete your planning and prepare web content. This includes verifying directions and distances found in at an existing Site record or building directions from scratch.

Visualize how your event will work at the site starting with the drive to the site and how volunteers will get to the correct parking location. If possible, take a digital camera. You might get a good promotion picture for the Calendar.

Print out the current or a blank **Site Page** to take on the site visit. A site record is required when setting up an event because the online volunteer Fact Sheet requires Site Page data. See more on the Site Page Overview in the appendix for this section.

### Project Promo Page

The Project Leader *may* prepare a “Promo”tion Page for the first event. This is an educational and a marketing tool. It gives prospective volunteers information about the project: goals, background (including scientific/technical information), links to relevant web sites that provide historical information or other relevant and interesting information about the project area.

As a Promo Page is really about the project, it should not include event specifics. Event specifics belong in the calendar text and the event Fact Sheet. Promo pages should be written in present tense so they will work better when they are moved to the Project Report page (“VOAz is doing” not “VOAz will do”) after the first event.

# Project And Event Management Guide

## Recruiting Staff/Volunteer Leaders

Both the EM and the TA have staff recruitment duties. The EM also coordinates and deals with unanticipated developments like covering for staff no-shows. Except for events with less than 15 volunteers, an **EM should assign all event positions to others**. While one volunteer can fill more than one role, there is merit in getting more volunteers involved managing an event.

### *Staff positions to be filled by the EM*

- Food Services Manager (see below)
- Safety Officer (usually the EM or a TA serves in this capacity)
- Photography/Web Album
- Master of the ceremony (often the EM, board member, or officer)
- Day-of Assistance (placement of directional signs, parking, sign-in table, kitchen set-up, shut down work at end of event.
- Delivery/return of service gear
- Shuttle drivers, caravan leaders, parking at shuttle destinations

**Once event positions have been determined,  
ask your leaders to register themselves and set their roles at that time.**

### *Website Notes*

- The “Leaders | Support” page contains the contact information of volunteers able to fill these roles. Email [admin@voaz.org](mailto:admin@voaz.org) if you have exhausted all of these possibilities.
- The registration form has two places to record event roles if a volunteer fills more than one role. The first field has a drop down of roles. Registrants use this field to identify their primary role. Another role for the volunteer may be typed into the second field. This is optional and for the convenience of the EM.
- The Force Registration utility can be used to add staff. The "Force Register" tool is just below the list of participants at the event Roster display. Enter the Volunteer ID for that individual and click the "Begin Registration" button. If you do not know the Volunteer ID, look at "Leaders | Support." Force Registration” should only be used to register volunteer staff that will be working on only that event.  
**Please do not force register friends/family/members/non-members to “save them a spot.”**

### *Food Service Notes*

Except for "mini-events," VOAz normally provides at least one meal for volunteers. A meal is one way to say "thank you" to volunteers. Meals also provide an opportunity for social time. Lunch is typically provided at one-day events and Saturday dinner and Sunday breakfast on weekend events. The longer the event, the greater the travel distance, the higher the proportion of the cultural norm of three meals per day will be provided by VOAz. Pot-luck meals are legitimate. VOAz may provide a main entrée for pot-luck meals.

The Food Service Manager has creative freedom in deciding on the menu within the budget, which is located on the [Forms, Doc, Links](#) page. (If the host is paying for meals, be as generous as they will allow.) The emphasis needs to be on quality and basically healthy meals. We do need to accommodate vegetarians however the food service team has the option of offering to accommodate more restrictive dietary needs. Normally, plan for the total number of registrants. Add to the meal count for host staff that may dine with the volunteers.

**Menus should be reviewed by the EM at least one week out and sent by the FSM or EM to all participants.**

## Project And Event Management Guide

### BEFORE THE EVENT – Phase 2

#### Event MOU

An Event MOU confirms the event dates, scope of work, rough agenda, and partner responsibilities. The **Safety Plan** is part of the Event MOU. The Event MOU template is in the first subsection of [Docs, Forms, and Links](#).

All public land managers have defined procedures for entering into agreements with volunteers. There is usually a Volunteer Agreement form to be signed by a representative of VOAz (PL, TA, EM) and the agency. VOAz retains a copy of this form and can be posted at the web by Admin. The agency usually will need to have the names of all volunteers who are at the event.

In the case of private non-profit hosts, the process may be simpler. Most carry volunteer insurance that provides medical benefits not otherwise covered by the individual's own health care insurance. This is a standard provision on all MOUs. **Verify that the host carries this type of insurance**. If there is no insurance available through the host, contact Admin. VOAz also carries a volunteer medical insurance policy as an additional back-up along with conventional commercial liability insurance.

**The EM needs to create and send a draft Event MOU to the TA and Host.** Generally, no response from a land manager must be taken to mean acceptance.

#### Event Page

After logging in, go to Events on the menu under Admin or Staff (menu bar). Select *Create Event* and new Edit page will open.

This task can be done by the Project Leader or EM. There is contextual help on the page for most items. At the first pass all of the red asterisk (\*) **items** must have an entry. You can make provisional entries because the default Status of the event is “Planning” and will not show on the Calendar. (There is also a “Proposed” status, if things are really not yet to the MOU stage.)

If you are new to this step, see **Additional Notes for Create Event Page** in the appendix for this section.

## Project And Event Management Guide

### Fact Sheet

Volunteer fact sheets are generated by drawing on inputs from the Site Page and the Fact Sheet Create/Edit Page linked to the event. A fact sheet may be worked on in stages before it is released for public view (check box at bottom of fact sheet edit page).

Volunteers can retrieve the fact sheet from:

- The Events Calendar
- The Event page
- Through a link inserted in an email sent by the Event Manager

The fact sheet and site set-up/edit displays have helpful guidance within.

Here is the basic process.

- Work out content, especially agenda and directions before doing Fact Sheet entries on the website. It is a good idea to review the Site page before proceeding to create the fact sheet.
- Login & go to EDIT Page for the event.
- Check Site Field (4a). Associate the event with the correct site, if not done already.
  - If your site is not on the drop-down menu, close EDIT and then open create Site at Sites page, submit, close; reopen Edit for the event and associate it with new Site at 4.a
- Click **Fact Sheet** link at top of the event Edit page and a new tab/window opens (it is "FS" on list of events). It will state **New** in upper left the first time it is opened and **Edit** when opened again for revisions.
- At the top of the page is a box for to use to create a link on the Fact Sheet to the National Weather Service. Follow the instructions below the box to find and copy the applicable URL for the site of the event.

Complete each section or as much as you can at this session (click **Submit** to end). No required fields are marked (red \*) at this stage. Only when a fact sheet is released to public view, will missing required fields be flagged. In fact, all fields are ultimately required except three labeled "leave blank if none." These fields do not appear on the fact sheet if they are left blank.

The information from the Site page that will appear in the fact sheet, except for the map, displays below the link to the Site page.

- Click that link to open Site page in a new tab.
- Complete/verify/update map, Directions to Site and Vehicular Access. Make sure directions are turn-by-turn with a <br> inserted to force needed line breaks.
- Then click the Submit button at bottom of Site page and close tab.
- Use the Preview link at the top right to see how it all presents.
- At the bottom of the page check the box to make the FS visible to the public.
- Click the Submit button at the bottom of the page before exiting.

# Project And Event Management Guide

## Registration

### 1. *Set Status to "Opening Soon"*

The event will appear on the Events Calendar after the event status is set to *Opening Soon* and saved. Getting events on the calendar early allows volunteers to plan ahead. Click the **Preview** link at the top of the page to review the content before it goes public.

### 2. *Admin Sets Status to "Open to Members"*

Events should be "open to members" by admin within +/- a day or two of the date shown on the Event Task Schedule. They may also be set to coordinate with the bulk email schedule. If you want to open an event at a date substantially different from the scheduled date or if you want to by-pass members-only status contact Admin.

### 3. *Set Status to "Open"*

This task should be done within a day of the date shown on the Event Task Schedule unless this is a members-only event.

To set an event to "Open to All":

- Click **Events** and then the link for your event
- Change status at item 4 and **Submit**.

### 4. *Monitor Registrations*

As registrations are made/updated/canceled the EM receives a copy of the auto email sent to the registrant.

Registration targets are set based on the work plan, the desired ratio of crew leaders to crew members, and the number of crew leaders who have volunteered. For the most part, volunteers respond to the Bulk Email messages that go out most weeks. The mailing list alternates between the entire OutdoorVolunteer.org database and the VOAz only database. Mailings to the latter are tailored to promote VOAz events with greatest need. Other recruitment mailings are possible if registration is lagging.

Building a relationship with volunteers is one of our primary goals with every event. Actions that can help us do this include:

- Monitor registrant comments and respond. Even if it is only to confirm that it has been read.
- Send a special message to first time volunteers. There is a link lower on the roster page for retrieving email address for first time volunteers and it appears next to their name. If possible, send a personal email. As our records are not always exactly correct, start a special welcome message with "Our records indicate that this will be your first VOAz event." Make sure they are clear on what is going to happen. Welcome their questions.
- Send a message to members. There is also a link for these addresses. Many join VOAz and continue because of their interactions with people who are already involved. No hard sell stuff but members can be encouraged to share their enthusiasm.
- Invite prior registrants who may have a special interest in the project. Email address link is at bottom of Roster page.
- Take action if registration is lagging. If an event appears not to be filling up about two weeks out, ask Admin to have the event featured in a bulk emailing. Suggest some pitch language.



# Project And Event Management Guide

## Gear and Gear Transport

### *Service Gear*

The **Event Service Gear** list, which covers base camp and food service, is available in Excel and PDF in the first sub-section of [Forms, Docs, Links](#). It does not include tools used by crews. It is important to review this list even for small events. The items common to almost every event are in bold face type.

All gear must be checked out and returned with a written service gear list. The cost of replacing any gear not returned to the warehouse and in the absence of an inventory list may be charged to the EM. Prompt the food service manager to select needed gear in advance so that you have one consolidated list for the event.

Camping gear available for loan is itemized on the inventory. The EM is responsible for having the bag liners washed after the event for loaned sleeping bags.

### *Gear, Food & Tools Transport*

Make sure that all food, tools and other service gear have a ride to and from the event. Check with the TA if you are not certain about the status of tool transport or want service gear transport help from the Tool Manager. Transport assignments noted in the "Role" space or "Comments" on the registration page will appear on the Roster display.

## Week of Event/Final Countdown

### *Reminder to Registrants*

An email should be sent to all registrants about one week out. An auto-email about this task is sent to the EM seven days out. A link in the lower section of the Roster page will aggregate registrant emails in a resident email program's bcc field or copy and paste from the adjoining filed to a web based mail service.

Sample text and items to cover:

- "This is to reconfirm that you are one of the lucky ones registered for the following Volunteers for Outdoor Arizona event: INSERT Project/Event, date, and location. If you or anyone included on your registration cannot attend, please log in at [www.voaz.org](http://www.voaz.org), click on "Events Calendar" and update/cancel your registration."
- Updates and other critical reminders
- Weather forecast summary from the NOAA link on the fact sheet
- Please read the additional details for volunteers at [www.voaz.org](http://www.voaz.org) (at View Details at the Calendar listing) [and/or attach a link to volunteer fact sheet here].
- Thank you for volunteering
- VOAz office phone: 480.966.2689

**You may use the calendar page to post updates.** For example, you could place the words " SPECIAL NOTICE (date)" at the top of the Event Summary Field and follow that with any special message.

### *Ceremony Script*

Use the **Ceremony Template** from [Forms, Docs, Links](#) to prepare a script for your *ceremony*. See the event Roster display for the names of those who will be attending their first VOAz event and those to be recognized for 10, 20, 30, 50, etc. events. Award items should be in the registration case. Ask the host and other partners if they would like to say a *few* words at the ceremony.

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### ***Day-of-Bundle***

Admin normally prepares a "Day of Bundle" on the Thursday before, unless the EM makes other arrangements.

The Day of Bundle includes:

- Registration Case with a notebook containing: roster, waivers, pins, and other items needed at the event
- An appreciation item for each volunteer, if available or not provided by host
- Drawing prizes (not part of mini events)
- yVOAz T-Shirts for youth
- Complementary copies of "The Joy of Trail Work."
- VOAz merchandise (not part of mini events)

### ***Set VOAz voice mail***

Weather conditions or other factors may make it appropriate to change the standard message on the voice mail at VOAz. (Instructions for resetting the message after the event are in the Post-Event part of this guide.)

Here is the standard voice mail message and where you should insert your special notice:

*Hello! You have reached the voice mail box for Volunteers for Outdoor Arizona.*

*Insert your special message here.*

*Please make any changes to your event registration--including cancellations--by logging in to your account at [www.voaz.org](http://www.voaz.org).*

*At the tone, you may leave a brief message, a phone number and we will get back to you as soon as possible. Thank you.*

When you are ready to record:

- Dial 480-966-2689
- The system asks for a password = 2140
- The system will prompt you to press 3 to change a message

### ***Print final roster***

The Roster in the registration case may not reflect late on-line cancellations/registrations. The EM is encouraged to print a final roster as close to the event as possible. A link is at the top of Roster display.

### DURING THE EVENT

#### Completed waivers & data for event report

**Every volunteer must sign the waiver document or an individual waiver at each event.**

##### *Before the End of the Event*

- Read all individual waivers and clarify illegible entries. Do this early--at sign-in, if possible.
- Mark up a Roster or make a list of no-shows so you can mark pre-registrants as either participated or no-show on the web site.
- You will also need a count of all who participated, which is a count of unique waiver signatures.
- Note those who may have left very early - for adjusting hours count.
- Return all waivers, in alpha order, to VOAz in the registration case with other gear.

The last page of the waiver form printed from the Roster page contains all the fields to be completed at **Post Event Entries**, located at the top of the event Edit display.

#### Expense documentation

Retrieve expense forms (blank copies should be in the registration case notebook) with receipts attached and top of form filled in and signed. Leave in registration case for payment by admin.

#### Complaints

Volunteers will sometimes make a verbal complaint/comment about some aspect of the event. The best strategy is to listen carefully and then offer a possible explanation **ONLY** if you are certain you are correct. In every instance, it is good to write down the person's name and their comment and return this information to Admin.

## Project And Event Management Guide

### AFTER THE EVENT

#### Reset VOAz voice mail

If the VOAz voice message was changed before the event, set it back to the standard message:

*Hello! You have reached the voice mail box for Volunteers for Outdoor Arizona.  
If you registered for an event through the VOAz web site, please make any changes to your event registration, including cancellations, by logging in to your account at [www.voaz.org](http://www.voaz.org).  
Please visit our web site at [www.voaz.org](http://www.voaz.org) for complete information about how you may participate in VOAz volunteer opportunities.  
At the tone, you may leave a brief message, a phone number, and we will get back to you as soon as possible. Thank you.*

When you are ready to record:

- Dial 480-966-2689
- The system asks for a password = 2140
- The system will prompt you to press 3 to change a message

#### Counts, Web Reports & Status to "Completed"

**Enter Data and Narrative on Post Event Entries page.** The link is at the top of the Edit page and instructions are on the Post Event Entries page. The TA provides outcomes information, hopefully at the event. The EM will enter participation counts and a brief narrative about the event (without participation or outcome data-this will be generated by system). The narrative should include the link to the photo album. Here is where you get that:

Go to [picasa.google.com](http://picasa.google.com)

- Sign in to VOAz's Web Albums/Google Account:  
email = [admin@voaz.org](mailto:admin@voaz.org) password = voazalbums
- Click your event's Web Album
- Click Link to this album (located on the right hand side, under the description)
- Select text in the box below "Paste HTML to embed in website".
- Select all of the text using your cursor, or press CTL+A to select all
- Right click, copy and go to Post Event Entries page.

Login at [www.voaz.org](http://www.voaz.org)

- At [voaz.org](http://voaz.org), under "Staff", click Events, located your event, click Edit
- At the top of the Event Edit page, click Post Event Entries
- Scroll to the bottom of the page to Item 6: Event Report for Web
- Paste the "Paste HTML to embed in website" text you copied from Picasa Web Albums at the top of the pane above the narrative.
- Click Submit Information

**Enter tips for EMs for future reference** based on anything special learned at the event at **#11 Project Notes at the Project page**. Date stamp entries. Review prior entries--perhaps some are no long useful. Access Project page through the Projects list or the link under item #1 at Edit for the event.

Set the Event Status (Item 4) to "Completed."

## Project And Event Management Guide

### Thank Partners and Volunteers

Thank partners via a personal email. Partner email addresses are available at the event Roster display. Send the photo album link when that is available.

The EM can update the web roster to mark participation after the Post Event Entries are completed.

**A thank you email should always go out to all attendees within 5 days of the event.** If you cannot meet this deadline, ask your TA or Admin to do so on your behalf. Participant emails are aggregated in the lower part of the Roster. It is also OK to send the thank you, to all registrants--let them know what they missed.

The Thank You text should *briefly*:

- Summarize their accomplishments and note any other special information of interest.
- Name and thank your staff.
- Solicit feedback on any ideas they may have about what we could have done better. (Please forward any suggestions to admin.)
- Ask those who brought others to the event to forward the thank you to the volunteer who came with them (These volunteers will not be in the database.)
- Insert link to Goggle photo album (If not ready, email the link when it becomes available.)

Be sure to proofread for typos, misspellings, incomplete sentences, and excess words before sending.

**Send a personal email to each new volunteer.** Ask them to tell you about their experience and if there is any way we could have done a better job, etc. If they are not members, suggest they consider joining as memberships are an important source of support. "Let me know if you have the time to volunteer in other ways to help VOAz continue its work while providing volunteers with the best possible experience."

### Event Photo Album

The EM should coordinate with the photographer(s) to help get the album completed. Download instructions for **Event Photography and Web Album Creation** from [Forms, Doc, Links](#). Instructions for placing a link are above.

### Update Site information

Review, correct and improve upon any erroneous information in the Site record.

### Injury Reports

All EMs should be familiar with the **VOAz Safety Net** document which is located in the TA/Crew Leader area of [Forms, Docs, Links](#). **VOAz event staff involvement in responding to any injury (other than telling a volunteer where their first aid kit is) must be reported to admin.**

If an injury occurs near the event but does not involve VOAz volunteers, the Safety Officer may authorize assistance. Such incidents are then to be treated as if they were VOAz incidents.

Document the following for each person injured and submit to Admin:

- Name of injured
- Injury
- Resolution
- Follow-up plan
- Contact information for injured person and the person responsible for follow up.

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## APPENDIX

### Site Page Overview

- A. Site Name: This is a label that never appears on public or volunteer pages. It should be easy for staff to recognize and associate with a project.
- B. Street Address: Enter if you can get it, but not required.
- C. Site Latitude, Longitude, and map: This is for generating a dynamic map as part of the Fact Sheet. See contextual help at the site page before setting up the Fact Sheet.
- D. Site access map: This NO LONGER is the default. Use the dynamic map (above) where ever possible. This can be used to supplement that tool if access includes remote locations that will not successfully map.
- E. Directions to Site: This information will be in the "How to get there" section of the fact sheet. It supplements the Google mapping tool. Travel directions can influence the critical first impression of a new volunteer. Before your visit to a new site, attempt to construct directions that you can test on a site visit.

There may be road conditions (flood damage, construction work) or special events that affect travel time. Check the Arizona Department of Transportation (ADOT) web site with information on current road work. ADOT also publishes a PDF with mileposts. Links are under *Resources at Other Websites* on the [Docs, Forms, and Links](#) web page.

If volunteers are likely to be arriving from somewhere other than the Valley, but not pass through the Valley, a set of directions "From the Phoenix area" and another from those other places is needed. Here is a partial **annotated** example:

“For those arriving from the Phoenix area and most other locations, the following directions are from the Crow Rd exit (#36) off the US 218. Allow at least 30 minutes for travel to the work site from this point.”  
[Establish a logical and easy to find reference intersection or landmark from which to start detailed directions. Provide a conservative estimate of total travel time from this point to the work site.]

- Drive 15 miles north on Crow Road to the intersection with Old Car Creek Road.  
[include mileage and direction of travel for each leg of the drive]
- Turn right onto Car Creek Rd. and drive 3.2 miles to Lost Puppy Trailhead.  
[turns define "direction segments" - direction segments appear on separate lines created with a <br > at the end of a line in web site text entry fields]

- F. Vehicular access: This information will appear on the fact sheet. How much of the drive is over unpaved roads? What is the likely condition of any unpaved road sections? Check on potential delays due to road work. (See ADOT link mentioned above.)
- G. Site Amenities: This is a catch-all for planning where things will take place. Factors to consider include:
  - Volunteer and staff parking
  - What will be the base of operations?
  - Where will food, gear and tools be unloaded?
  - Need room for tool caches?
  - What is the best check-in point for volunteers?
  - Food preparation and service location
  - Is a canopy advisable? Sometime weather conditions will help answer this.
  - Other considerations are the need for a visible "anchor" and the preferences of the food service manager.
  - Camping areas, if applicable
  - Sanitation facilities
- H. Site Notes: The notes section should also have information about *local emergency services*. You will be asked to verify this later in the management sequence.

## Project And Event Management Guide

### APPENDIX

#### Additional Notes for Create Event Page

##### 10. Event Show Rate

What percentage of registrants will likely show up. Smaller events and ones with high proportion of members will have a higher show rate. A good norm for VOAz events is 85% if there is nothing else to guide you. For Events where the host strictly limits, 100% may be best to avoid any chance of overbooking.

##### 11. Allow Wait List

Effective January 2011, VOAz's automated registration system added the option (Item #11) to create a Wait List when an event fills (default is on). When the event reaches the maximum allowed volunteers, the calendar page will automatically offer prospective volunteers the option of being added to the Wait List. The system auto-emails the EM and the volunteer that s/he is added to the Wait List. The registration system automatically fills any cancellation with the next available volunteer that fits the criteria and sends confirmation emails using the following rule:

- If one registered volunteer cancels, the system will look for the first available single wait-listed person to cancel.
- If a group of two registered volunteers cancel, the system will look for the first combination of wait-listed volunteers to fill the vacancy (to individual registrants or a group of two). It behooves volunteers to wait-list as an individual or group of 2, versus a group of 3 or more.

Note: There is no way to determine the likelihood of a wait-listed volunteer being registered as the system does not show you the order in which volunteers joined the Wait List (but it knows).

Items that complete the VIEW DETAILS page:

##### 14. Event Summary and 15. Event Description

Here are some of the things a good event description includes:

- What we will do & why the work is important--human and wildlife benefits
- Any special skills needed or physical demands for this event
- Something about the place—attractions, amenities, accommodations if an over night event (primitive camping, running water, toilets)
- Entertainment, special speakers, or other things that would draw volunteers
- If camping, note that "VOAz has tents, sleeping bags, and air mats for loan. Make your request in the Comments box when you register."
- Thanks to partners message and other credits. See current calendar for examples.

Note that the Summary also appears along with the Description at View Details—don't repeat.

This is one entry task where spending too long can lead to loss of data when the system times out. Use a plain text editor to compose your text first and then open Edit and cut and paste to the form fields, add a <br> for line breaks and <br><br> for paragraph breaks and click Submit.

16. **Difficulty Level** is set by TA.

##### 17. Minimum Age

Verify with the TA. The EM decides in consultation with the TA if families wanting to bring children below the minimum are to be allowed. Make every effort to accommodate in accordance with what is stated on the FAQ page of the website. (Basically, one parent/authorized adult must be present to supervise and at least one other to work.)



## **Project And Event Management Guide**

### **APPENDIX**

#### **Additional Notes for Create Event Page (continued)**

##### **20. Contact Person**

This does not have to be the Event Manager for the event, but it should be a trained/experienced EM.

Registration Add-ons:

##### **24. Rideshare**

If you check the box, it will place an additional field in the reg. form that will give location information of those interested in ridesharing. An email link at the Roster allows the EM to share this information with all who make an entry in this field.

##### **25. Registration Comment add on**

You may enter a brief request for information from registrants such as: tell us your expected time of arrival; or, high clearance vehicle available for shuttle? The registration form cannot otherwise be customized to obtain detailed information. Any requests entered here will appear on the registration form just above the Comments box. It is also easy to email registrants to gather more details.

Click the Preview link at the top of the page to review the content as it will appear to the public.

## Project And Event Management Guide

### APPENDIX

#### Changing the registration target

Based on the variables set at event Edit display, the program will track registration and close it when the computer target is reached or allow a wait-list to build, if that option has not been disallowed. Should the scope of work change and *more volunteers* are needed for an event that has already been filled, reopen registration by doing the following:

1. Resize the work force for the days of concern to the number you desire at item #8 in Event Parameters area of Edit. Changes to the staff allowance and show rate can also effect the number of registrations allowed.
2. Reset the event status at Edit to "Open to All" (or just Members if it is restricted) at item #2
3. Save by clicking "Submit Information."

If *fewer volunteers* are needed, perhaps the TA can plan on finishing the event a little early. If the reduction is too great to do that you may need to cancel a day of work. You can also reduce the target numbers at item # 8, set Status to "Full", and click Submit.

Note: We are not booking airline seats! Having a few too many or two few volunteers is usually not such a big deal.

#### Closing an event to new registrations so that even cancellations do not cause it to reopen

Set the number(s) at #8 very low, reset status to Full, turn off Wait-List (#11) and click Submit. As the number of registrants drops due to cancellations the event will not reopen, if you set the number desired low enough.

#### Changing event dates

Bad idea because you lose all registrations; but, if you must...

1. Print the current roster
2. Send an email to all current registrants, including any wait-list volunteers and ask them if they want to attend on the new date(s).
3. Change the event dates at #8 and set status to opening soon.
4. On Roster page, Force Register all who still want to volunteer.
5. Return to Edit page and reset status to Open at #2 and Submit.

ALWAYS and ONLY use the "Create New From Existing" button in upper right corner of Edit to create a new event from an old event.