

# Planning & Management

*Planning and managing volunteer events that make a positive first impression.*

## Mobilize volunteers for outdoor stewardship

An organization that wishes to mobilize volunteers for the often hard and dirty work of environmental stewardship must never forget the importance of taking good care of volunteers; in particular, to make a positive impression the first time someone volunteers. People who volunteer for this kind of work are highly motivated; but they are just as likely as anyone to be put off by poor event management. Most volunteers can understand mistakes and accept glitches, but only to a point.



**Contributions of well-organized volunteer work are significant and imperative to the success and longevity of outdoor agencies, organizations, and groups.**

The need for outdoor stewardship is too great to settle for poor, lackluster management of volunteer events. The contributions of well-organized volunteer work are significant and imperative to the success and longevity of outdoor agencies, organizations, and groups.

### Topics covered in this document

#### Pre-Event Tasks

1. MOU & Site Assessment
2. Event Promotion & Staffing
3. Detailed Planning
4. Volunteers Fact Sheet
5. Gear Lists and Gear Transport

6. Final Count Down

7. At Event

#### Post-Event Tasks

8. Thank Partners & Volunteers
9. Compile Statistics, Photos & Reports

## Pre-Event Tasks

### 1. MOU & Site Review

#### **Memorandum of Understanding (MOU)**

An MOU contains important provisions and agreements with Land Managers and other agency partners, and includes primary contacts, goals, time parameters, reporting requirements, and specific responsibilities accepted by each partner. This type of MOU is not a legal document; it is simply an explicit statement of good faith commitments. The purpose of the MOU

is to clearly identify each partner’s responsibility. An MOU may be for a single event or for a project that will be completed through a series of events.

VOAz uses a MOU at both the project and event levels. It also serves to remind our host partners of the work required of VOAz to produce successful volunteer events. An Event Safety Plan should be a part of or an attachment to the MOU. *Sample MOU formats are appended.*

**Agency Volunteer Agreement**

Most public land managers have formal procedures to enter into an agreement with volunteers. There is usually a form to be signed by a representative of the volunteer group. The land manager will usually require you to provide the names and possibly addresses of all volunteers. The Agency’s Volunteer Agreement normally extends workers compensation benefits to volunteers.

**Site assessment**

If you are not familiar with the work site, visit the location at the beginning of the planning process. If possible, go with the host and other participating agency representatives. The purpose of a site visit is to gather enough information to complete your planning, prepare promotional materials and create a volunteer fact sheet that contains information volunteers will need to pack appropriately and get to the site. For remote sites a GPS device can be used to collect data and prepare an accurate map. Additionally, coordinates identified using a GPS device can be used to provide directions using online mapping services.

Other site information data you may need:

- What are the road surfaces? Are 4x4 or high clearance vehicles required for some part of the trip?
- How will volunteers get from a parking area to camping and work site?
- Where will food, gear and tools be unloaded?
- Where will you set up a kitchen?
- How will you handle sanitation needs?

Information critical to volunteers may be conveyed through your web site, on a volunteer fact sheet (described below), and other locations where you advertise your events, such as OutdoorVolunteer.org.

**Driving Directions**

Travel directions need to be carefully prepared as they can influence the critical first impression made on a new volunteer. Before your site visit, construct directions that you can “test” as you drive to the site. If directions are already available, confirm their accuracy. If volunteers are likely to be arriving from several different directions, you will need more than one set of travel directions.

*Here is an annotated example of travel directions:*

From the Phoenix area, 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 on Car Creek Rd.

*Turns define “direction segments” - direction segments appear on separate lines*

Continue 6.5 miles east on Old Car Creek Road to Elephant Park Road turnoff, which is marked by a prominent sign and the "Old West Saloon" just past the turn off.

Turn left onto Elephant Park Road and drive about 2 miles to a "pay station"

A short distance past the pay station look for the "Elephant Corral" sign and a VOAz sign. *Note:* VOAz signs sometimes go missing or are knocked down.

*Include any useful disclaimers*

Turn right at the sign - the paved road turns to a good quality dirt road.

Continue for 1.5 miles, and look for a VOAz parking sign/attendant

In addition, 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.

## 2. *Event Promotion & Staffing*

### **Event Promotion**

Event promotion not only helps you recruit volunteers needed to do the work, but it is also good publicity for your organization. Local media outlets, flyers posted at trailheads and other spots where prospects are likely to gather, your organization's website, and OutdoorVolunteer.org are all good outreach tools. People working together on a task they believe is worthy is a powerful experience. It is much more powerful than the traditional paraphernalia of brochures, news releases, and appeals for support through donations. Publicity is needed to get people to the work, but it is the work that forges the bond of lasting relationships and perhaps a stream of continuing financial support.

Many organizations do not have access to publicity professionals to help them develop content and presentation formats. But with a computer you can prepare a simple flyer, and organizations with web sites typically have someone who can help with your web-based advertising. It is important to make your event sound like it will be a fun and exhilarating experience, as well as meeting a real need. Prospective volunteers also need to know if there are some real physical challenges or access issues. You do not need to provide all the details about your event at this stage, but give prospective volunteers what they need to know to make an informed decision to participate:

- The type of work and the degree of difficulty
- Start and end times
- Benefits - meals provided, appreciation items
- Features of the location, and information as to where volunteers will be camping and working
- If there is camping; is it car camping? Are there sanitary facilities or is it primitive?
- Any special requirements to participate
- Especially challenging events (difficulty of work, access, high altitude, weather conditions) may warrant a screening process, provided you have the capacity to conduct a valid screening

OutdoorVolunteer.org is an easy-to-use and powerful on-line tool for managing volunteers. The companion document "User Guide" for OutdoorVolunteer.org explains how to use this web site to promote volunteer stewardship work.

### **Recruit Staff**

While small events may be run by one volunteer or staff person, there are some advantages to creating more roles whenever reasonable. It can provide a way for volunteers who do not want to do the hard manual work to participate. Providing food service is an example of such a role. It engages volunteers more in the operation of the organization if they have a special role at an event. You may select registered participants for some of these roles. For example, if there is someone on your roster who you know would be an especially good greeter, ask them to show up a little early and greet each volunteer while taking care of any paperwork. Having a greeter is especially appreciated by new volunteers. Every event should have a designated Safety Officer who knows your protocols for managing an emergency situation. Make sure all event staff know who this person is.

Many organizations have a designated photographer and post event photos at their website. Participants and prospective volunteers will view these. It provides a richer story of what your organization is about. Volunteers in the photos you use should be smiling!



### 3. Detailed Planning

This phase includes:

- Detailed work planning to specify tool and materials requirements.
- Menus for any meals provided by your organization so that shopping lists can be prepared and food service equipment secured.

#### Sanitary Facilities

Your organization should establish sanitary facility standards for all events. Here is an example of such standards:

- Primitive camping with fewer than 10 volunteers: Pit toilet or cat holes, depending on the environmental conditions.
- Primitive camping with 10-15 volunteers: Pit toilet or better.
- Primitive camping, developed campgrounds, urban sites with more than 15 volunteers: Portable toilet or better. The number of toilets depends on the size and duration of the event. Consult with the provider of the service or the host.
- Host standards, if they are higher than the above

### 4. Volunteer Fact Sheet

As your roster of event participants develops and the event and work plan details are fleshed out, your attention should turn to preparing volunteers for a successful experience. Sometimes the important details of the work and the itinerary for the event are not finalized until you are closer to the actual event date. While you have provided some essential information with your promotional materials, now it is time to flesh out the details. Everyone likes pleasant surprises but no one wants to learn that they needed to bring certain items to an event after they arrive on site.

The key elements of a volunteer fact sheet are provided in a sample template in Appendix C. This template can be downloaded from [www.VOAz.org](http://www.VOAz.org) and tailored to create an agency-specific document to serve as a basis for all of your volunteer fact sheets.



#### Monitoring Registrations

The Comprehensive Option for listing events at [OutdoorVolunteer.org](http://OutdoorVolunteer.org) provides access to a powerful on-line registration tool that allows you to set registration targets and adjust as needed. You may also create a wait-list to handle popular events with registration limits.

If registration is lagging you may want to send a special appeal to your base of volunteers. Those who use [OutdoorVolunteer.org](http://OutdoorVolunteer.org) to manage event registration will, over time build up a database of past registrants and participants to which they may direct special appeals, including funding appeals, which may not be included in the event calendar.

Building relationships with volunteers to create and grow a constituency is one of your primary goals. The registration tool at [OutdoorVolunteer.org](http://OutdoorVolunteer.org) has features designed to support this and assist in event management and communication. These include:

- A confirmation message is sent to the registrant — with copy to the event contact person — after each registration, change of registration, or cancellation.
- Registrants can ask questions on the registration form. A prompt response from the contact person creates a very positive impression.
- Email your first time volunteers with a special welcome.
- It is easy to send special messages, reminder notices, and volunteer's fact sheets.
- After you mark participation on the Roster page following the event, you can pull all participant email addresses into your program to send your thank you message.

Additional information and instructions are available in the *User Guide* for [OutdoorVolunteer.org](http://OutdoorVolunteer.org).

## 5. Gear Lists and Gear Transport

Make a master inventory of all tools and service gear (registration table, food service, water coolers, etc.) in your possession or readily available for each event. Use that to build event specific lists. Make sure that all food, tools and other service gear will be transported to and from the event. The event gear should be the responsibility of a specific individual who will be at the event and make certain all gear is returned after the event. An event tool manager has the same responsibility for tools.

## 6. Final Count Down

### Weather and Reminder

Check the weather and relay that information to your registrants in your event reminder notice. If conditions are rapidly changing, you may need to send updates. Below is one of the most comprehensive links for weather. For rural project sites, the relevant community may not appear on major newspaper or weather information web sites: <http://www.weather.gov/>

If you do not prepare a volunteer fact sheet as a separate document, be sure that your reminder email covers all of the relevant items from the template at the end of this document.

### Ceremony Script

Make a list of all staff, volunteers, and partners to be recognized at your event. You can include membership appeals, guest speakers, and other information volunteers might find useful.

Waivers and host agency volunteer agreements, name tags, extra sun block, agency brochures, list of future events should all be part of the package sent with your on-site management staff or volunteers. All of these items should be on your "gear" inventory so that event managers are reminded to bring them to each event.



## 7. At Event

Complete the necessary paper work and safety orientations. Do the work and have a great time!

Thank your volunteers when they arrive, at your ceremony, and as they leave. Note the outcome statistics for your agency and host.

### Safety Talk

A general safety talk should be part of every work event. At events with 20 or more volunteers, these are better done at the crew level, where it is easier to hold people's attention.

# Post-Event Tasks

## 8. Thank Partners & Volunteers

Those listing their events at OutdoorVolunteer.org using the Comprehensive Option will find a link on the Roster page to email all participants. Be sure to mark Registrants as "Participated" in the Roster. Use the "BCC" address space unless you want to distribute everyone's email address to all participants.

Consider including the following in your thank you message:

- Summarize accomplishments and note any other special information of interest
- Name and thank your staff (paid and volunteer) for the event and host agency
- Solicit feedback on any ideas they may have about what we could have done better

- Ask those who brought others to the event to forward the thank you to the volunteers who attended as part of their group
- Insert a hyperlink to the event photo album, if this is available

## 9. *Compile Statistics, Photos, and Reports*

Your agency and host agency should notify you of reporting requirements before the event. For grant supported work, volunteer time usually counts toward matching requirements.

Photo display web sites, such as Google Albums, or your organization's website are good locations for event photos. VOAz has found that this is a popular feature even among non-participants — providing another recruitment and publicity tool.

### **Incident Reports**

Any injury or illness requiring attention more than a simple Band-Aid must be reported to your agency. 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:

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

The other class of incidents that need to be documented are **conflicts that required event staff intervention**, and may warrant follow-up. Every organization should have a documented policy of conflict reports covering topics analogous to those shown above for injuries. Management may then decide what follow-up action is appropriate.

Incident reporting does not include results or performance reporting.

## APPENDIX A: PROJECT MOU TEMPLATE

[Organization Name]

### MEMORANDUM OF UNDERSTANDING (MOU)

This document assigns responsibilities for certain tasks to be performed by [Organization Name], the project host, and other partnering organizations. This document is not a contractual agreement. All partners are only committed to their best efforts, except that host partners are required to provide access to reimbursement for medical care resulting from injuries incurred while participating as an event volunteer. If more than one event is required, an addendum for each event may be issued.

Project Name: \_\_\_\_\_

Host Agency: \_\_\_\_\_

Agency Contact(s): \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

[Organization] Project Leader: \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

Other Partner: \_\_\_\_\_

Partner Contact: \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

Project Location:

Project Goals:

Summary of Work:

Number of events, days each, and range of number of volunteers likely needed to complete project:

Target Project start date:

Target Project completion date:

Food service costs paid by:

Food service delivery by:

#### **RESPONSIBILITIES OF [Organization Name]:**

Same as Project MOU

#### **RESPONSIBILITIES OF [Host Agency]**

Same as Project MOU including provision of volunteer insurance or access to workers compensation insurance to cover uncompensated medical care required as a result of injuries incurred as a registered event participant.

#### **RESPONSIBILITIES OF [Other Partner]**

APPENDIX B: EVENT MOU TEMPLATE

[Organization Name]

MEMORANDUM OF UNDERSTANDING (MOU)

This document assigns responsibilities for certain tasks to be performed by [Organization Name] and the project host. The MOU is not a contractual agreement as all partners are only committed to their best efforts, except that host partners are required to provide access to reimbursement for medical care resulting from injuries incurred while participating as an event volunteer.

Project Name: \_\_\_\_\_

Event Name: \_\_\_\_\_ Starts on: \_\_\_\_\_ Ends on: \_\_\_\_\_

Host Agency: \_\_\_\_\_

Agency Contact(s): \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

[Organization] Project Leader: \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

[Organization] Event Manager: \_\_\_\_\_ email \_\_\_\_\_

phone \_\_\_\_\_

Other Partner: \_\_\_\_\_ Contact \_\_\_\_\_

email \_\_\_\_\_

phone \_\_\_\_\_

Tentative Agenda:

On-site registration opens:

Work hours:

Meals provided (time):

Appreciation Presentation at:

Summary of work:

Site:

Meals Provided (by):

Volunteer appreciation item:

Entertainment/Education:

**RESPONSIBILITIES OF [Organization Name]:**

Same as Project MOU

**RESPONSIBILITIES OF [Host Agency]**

Same as Project MOU including provision of volunteer insurance or access to workers compensation insurance to cover uncompensated medical care required as a result of injuries incurred as a registered event participant.

**RESPONSIBILITIES OF [Other Partner]**

## [Organization Name] Event Fact Sheet

[Project Name]: [Event Name]

Date(s)

*Please note: You must register in advance for this event. If you or anyone in your registered group is unable to attend, please go online and cancel/change your registration.*

### What to Wear and Bring

- sturdy shoes
- work gloves
- # quart/quarts of water or more to carry with you - additional water will be available on-site
- sun protection (wide brim hat, loose clothing that covers your limbs, sun screen)
- snacks to help you make it to lunch time
- rain gear and warmer clothing, if that is what the forecast indicates
- long pants and shirt sleeves are recommended
- tweezers or needle nose pliers for extracting cactus needles
- chair for meal and hanging out time
- camping gear, including eating utensils. Provided meals do not include eating utensils, plates or cups, unless otherwise noted.

### Physical Requirements to Participate

[Additional details about range of tasks and difficulty. Is altitude a potential factor?]

### Meals

[Who provides. Where meals will be taken]

### Agenda

[Include an itinerary – check-in opens, work begins, work ends, breakfast, lunch, dinner, presentation, etc]

### Camping/Accommodations

[Available accommodations, car-camping, campground, tent-camping, backpacking, amenities, etc]

### Emergency Services

[Optional – cell service, nearest hospital etc.]

### Vehicular Access

[Road conditions - paved, dirt, high-clearance or 4x4 vehicles, etc]

### Ride-share Arrangements

[If any]

### Directions

[Break directions into a series of one line statements for each leg. Consider directions volunteers will be driving from. Include map, if available.]