Pre-Project Planning Checklist

☐ Contact agency to understand project details

☐ Create a proposal for review by SIRC membership and board
  o Submit proposal at a business meeting (email prior to meeting if possible)
  o Include an estimated budget
  o Request a vote for approval of project and budget

☐ If possible, conduct a site visit to meet your Agency Contact and to better understand the logistics at the work site.

☐ Begin recruiting volunteers for your project.
  o Announce during club meeting (ask president to add to agenda)
  o Email members requesting volunteers
    ▪ Be specific about what is required
    ▪ Include dates, times, physical or financial requirements

☐ Prepare and send an email to your volunteers with all necessary information.

☐ Gather items for the Project Supply Kit.

☐ Call your Agency Contact to confirm final details/logistics. Obtain day of project phone number in case of emergency, rain, cancellation, etc.

The B.A.T. Approach

When emailing team members, try the B.A.T. approach for clearer communication! Organize your email into the following sections:

  B ackground – Provide the background information team members need.

  A ctions – Clearly outline actions needed prior to the meeting.

  T imeline – Provide a specific timeline for any deliverables.
Questions to Ask During Planning

Here is a brief checklist to ensure you have all the information you need from your agency to get the project started.

☐ What are the agency’s needs? (This is to gather information, not make a commitment.)

☐ What is the minimum and maximum number of volunteers necessary for a particular event? OR (If resources are needed…) What exactly is needed? How many?

☐ Are there any age restrictions?

☐ What type of tasks will the group be working on? Will they be working as a group or individually?

☐ Is there any training necessary to complete the project?

☐ What is the time commitment for volunteers?

☐ Are there any necessary forms/waivers to be signed?

☐ Do the volunteers need to bring any supplies?

☐ Are there any special instructions for volunteers?
  o Directions?
  o Time to arrive?
  o Refreshments provided?
# Budgeting Template

Use this template to prepare an estimated budget for your project. This can be shared with the membership at a business meeting for approval. Once your budget is approved, you can keep track of all your expenses, and only need to seek additional approval for any changes to the estimated budget.

<table>
<thead>
<tr>
<th>Project Date:</th>
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<tbody>
<tr>
<td>Project Name:</td>
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<tr>
<td>Project Leader:</td>
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<td>Project Team:</td>
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## Estimated Expenses:

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Supplies</td>
<td>$__________</td>
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<tr>
<td>Facilities</td>
<td>$__________</td>
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<tr>
<td>Food</td>
<td>$__________</td>
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<tr>
<td>Donations</td>
<td>$__________</td>
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**TOTAL:** $__________

## Estimated Income:

<table>
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<tr>
<th>Item</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Sales</td>
<td>$__________</td>
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<tr>
<td>Donations</td>
<td>$__________</td>
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</tbody>
</table>

**TOTAL:** $__________

### Estimated In-kind donations (food, facilities, etc.):

List items:
Day of the Project Checklist
(Be sure to print this and bring it with you on the day of the project.)

Before Volunteers Arrive (at least 30 minutes before the start of the project)

- Wear your SIRC T-shirt (if appropriate for the event).
- Bring any supplies that you’ll need (see Day of Project Supply Kit).
- Arrive at least 30 minutes early to meet your nonprofit agency contact and set up for the day.
- If not coordinated by the agency, prepare the volunteer check-in area/process. If you don’t have a table, you may want to have clipboards available.

Starting the Project (the first 10 minutes of your project)

- As volunteers arrive, be sure to greet them, introduce yourself and direct them to the check-in area. Introduce volunteers to each other.
- You may want to recruit a volunteer to help you manage check-in.
- Work with the agency contact to start the project on time. Join the Agency Contact in welcoming the volunteers as a group and thanking them for participating.
- The agency contact should give a brief introduction and description of the project, and outline how this project will help address the needs of the community.
- Print out a copy of your volunteer roster from the Portal & have people sign in and initial.

During the Project

- Circulate and check in with all volunteers to make sure they have all the supplies they need and that they are having a good time.
- Be mindful of the project schedule. Keep track of the time so that your project starts and ends on time.
- Make sure your volunteers drink enough water.
- Take pictures.
- If everything is running smoothly, offer your assistance on one of the volunteer assignments.

At the End of the Project (the last 10 minutes of your project)

- Work with your agency contact and the volunteers to make sure that all necessary clean-up is completed.
- Gather all volunteers so you and the agency contact can thank them for their hard work.
- Be sure to keep a copy of the volunteer check-in list so that you know who was at the project.
- After the project: Remind volunteers to share their feedback using an evaluation form.
Day of Project Supply Kit

The following items can be key in the success of your project:

- Copies of Day of Project checklist
- List of volunteers from Involved Portal
- Nametags
- Small black markers for nametags
- Camera, film
- Water (if necessary)
- Any donation items committed to the agency

Depending on your project, you may also want to consider bringing the following items with you to the project:

- Paper/Notebook
- Clipboard(s)
- Extra pens and pencils
- Large black marker
- Scissors
- Small supply of band-aids, antibiotic ointment and ibuprofen
- Rubber bands
- Tape
- String or twine
- Small plastic bag(s)
- Moist towelettes
- Sun block
- Insect spray
- Radio (be sure to check with the agency to ensure this is appropriate)
- Backpack
End of Project Checklist

☐ Send recognition email/photos to volunteer group.

☐ Remind volunteers to share their feedback by completing an evaluation.

☐ Thank your agency contact for all of their support.

☐ Upload/develop your project photos.

☐ Print any photos that would be good for our Historian to include in the club’s scrapbooks.

☐ Send photos and write a brief summary (bullet points are fine) of the event that the club president could use in an upcoming District Newsletter.

☐ Congratulate yourself for doing a great job as project leader!
SIRC PROJECT/EVENT PROPOSAL

Program/Event: _______________________________________________________________________

Program/Event Date: _______________________________ Time: ______________________________

Chairperson: ______________________________________ Phone #: ______________________________

Committee Members: __________________________________________


(Details to be documented in Notes section at bottom)

□ OK with insurance? □ Food/beverage to be served? □ Volunteers needed? Min #
□ Food/bev. service equip needed? □ Plates/bowls, utensils, cups and/or napkins needed? (Detail below)

Audio/Visual Requirements: (include quantities of equipment/devices)

□ Microphone(s) # □ TV/Projection Screen □ VCR/DVD Player
□ Slide Projector □ Sound equipment □ Easel(s) #
□ Cassette/CD Player □ Flip Chart(s) #

Permits/Facility/Transportation Requirements:

□ Permits needed? Type/Cost $ □ Tables needed? #
□ Janitorial? – Cost $ □ Table coverings? Type? (detail below)
□ Equipment rental needed? – (detail below) □ Chairs needed? #

Advertising/Publicity:

□ Signs need to be made? (detail below)
□ Advertising in Grapevine? Deadline:
□ CCC advertising? CCC Meeting Date(s):
□ Advertising in RC Post?

Special Requirements/Notes:

_____________________________________________________________________________________
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□ Board approved? □ Membership Approved?
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<thead>
<tr>
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