



AGENCY CHECKLIST



| ✓ When done | <u>PRIOR TO EVENT</u> | Person Responsible |
|--------------------------|---|-----------------------|
| <input type="checkbox"/> | Check on your insurance policy to ensure adequate coverage for volunteers working at your organization. | |
| <input type="checkbox"/> | Prepare a brief orientation/fact sheet about: <ul style="list-style-type: none"> ☞ Your agency and clients ☞ The volunteer project including the actual physical job and any safety issues ☞ Explain how specific activity will help <u>clients</u> within your organization | |
| <input type="checkbox"/> | Coordinate with the group providing the volunteers <ul style="list-style-type: none"> ☞ Call the group contact person as soon as possible to begin planning. ☞ Invite group team leader for a site visit to discuss your project & goals. ☞ Assist the company with pre-event promotion, as needed. ☞ Confirm details including date, time, location, & directions to the project (including written directions & a map). Let Volunteer San Diego know of any changes. ☞ Determine what project supplies are needed & whether the volunteer group will be able to contribute any of these. ☞ Get name and address of the group leader for thank you letter. | |
| <input type="checkbox"/> | Prepare for potential media coverage. <ul style="list-style-type: none"> ☞ Obtain an authorization form (photo release) for volunteers to sign to allow use of their picture by the agency, media, or company. | |
| <input type="checkbox"/> | Stress to your staff how important it is to greet and welcome volunteers and to give them verbal encouragement during the event. | |
| <input type="checkbox"/> | Prepare a sign-in sheet for volunteers' names, contact information, and total hours worked, so you can send thank you notes to the volunteers. | |
| <input type="checkbox"/> | Arrange to recognize and thank the volunteers for their efforts. <ul style="list-style-type: none"> ☞ Have clients and staff give verbal thank you during the event, if appropriate. | |
| <input type="checkbox"/> | Prepare name tags for staff and volunteers. | |
| <input type="checkbox"/> | Be sure all supplies are on site and that any preparatory work is completed prior to the project date. | |
| <input type="checkbox"/> | Take "before" pictures. | |

| <u>DAY OF THE EVENT</u> | | |
|--------------------------|---|--|
| <input type="checkbox"/> | Provide name tags for volunteers & staff. | |
| <input type="checkbox"/> | Welcome & thank the volunteers for their efforts. | |
| <input type="checkbox"/> | Use the sign-in sheet from Volunteer San Diego's website for volunteers' names and total hours served to track participation. (These sign-in sheets also serve as waivers of liability and photo release forms.) | |
| <input type="checkbox"/> | Provide volunteers with a <u>brief</u> orientation including: <ul style="list-style-type: none"> ☞ Agency purpose and clients served (distribute fact sheet/brochure). ☞ The nature of the project: WHAT is to be done, WHY it is needed, WHO the volunteers will be helping, and HOW the volunteers' efforts will help make a difference in someone's life. ☞ If time permits, you might want to provide a tour of your facility. | |
| <input type="checkbox"/> | Coordinate and supervise the volunteers throughout the project. | |
| <input type="checkbox"/> | Give the volunteers lots of verbal encouragement during the event to keep their enthusiasm up. | |
| <input type="checkbox"/> | Make the project fun! <ul style="list-style-type: none"> ☞ Play music. ☞ Provide refreshments. ☞ Take action shots and "after" pictures. | |
| <input type="checkbox"/> | Assist the media as needed. | |
| <input type="checkbox"/> | Give the volunteers an opportunity to reflect on what they have accomplished. | |
| <input type="checkbox"/> | Let the volunteers know of <u>other</u> volunteer opportunities available at your agency. | |
| <u>AFTER THE EVENT</u> | | |
| <input type="checkbox"/> | Send individual thank you letters to the group's leader, company's CEO, or other key volunteers. Have clients make thank you cards or send photos from the day. | |
| <input type="checkbox"/> | Meet with the group leader(s) to evaluate the project & discuss future opportunities. | |
| <input type="checkbox"/> | Notify Volunteer San Diego of any media that attend event: Stan Miller (858) 636-4133 or Sarah Adams (858) 636-4136. | |
| <input type="checkbox"/> | Follow-up with media. | |
| <input type="checkbox"/> | Contact Volunteer San Diego and let us know the total number of participants at your project(s), how many hours they served, and what they accomplished. | |