



# PROJECT MANAGEMENT

Project Planning Module

VOLUNTEERS FOR OUTDOOR COLORADO  
**STEPPING UP**  
  
**STEWARDSHIP**



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### **About Volunteers for Outdoor Colorado (VOC)**

Volunteers for Outdoor Colorado is the oldest and largest outdoor stewardship organization in the state. We work to connect people to Colorado's outdoors in ways that inspire them to be caretakers of the state's natural resources. This is especially important because the demands on our outdoor resources are extensive and Colorado's stewardship needs are reaching a near-crisis level. VOC is playing a leading role in addressing these challenges in three ways. First, we're fostering statewide collaboration on issues and solutions. We're also expanding stewardship efforts by helping others build and grow successful volunteer programs. Finally, we're continuing to engage 5,000 volunteers each year in on-the-ground, hands-on stewardship work.

# Executive Summary

This guide will provide the basic steps to completing a project, how to become an effective project manager, and the necessary skills it takes to successfully lead volunteer groups.

- ▶ **5 steps for successful completion of a project:**
  - ▶ **Initiate:** Put together a Project Team to help facilitate and lead the project. Assign team members to roles based on project needs and individuals' experience (i.e. Crew Leader, Tool Manager, Crew Chef, etc. - see [Step 2](#) for more information).
  - ▶ **Plan:** Establish an action plan that the Project Team can follow with a clear idea of what you want the Project Team to accomplish. Have the plan include project goals (results to be achieved), and more specific objectives (short-term accomplishments) to reach those goals.
  - ▶ **Implement:** On the day of the project, Project Team Leaders should be the first to arrive on site: orient the leaders, stage all supplies, and prepare to welcome volunteers. Once volunteers arrive, break them up into crews. Have each leader introduce the project to their group, establishing safety precautions, how to use tools, instructions on what needs to be done, why their work is important, and what effect their work will ultimately have.
  - ▶ **Review & Adapt:** Make sure crew leaders understand how to use adaptive management to continually assess whether they are on track to achieve the project goals. All Project Team leaders should know how to make necessary changes along the way in order to solve problems and make improvements to the plan.
  - ▶ **Evaluate & Close-out:** This is the time to assess the goals and objectives established at the start of the project to make sure they were successfully achieved. Evaluating the deliverables and implementing surveys from the groups involved are effective means of measuring success.
  
- ▶ **Project Manager Requirements.** Project Managers need to have a good understanding of the entire planning process, be well organized, and be a good team player and motivator. Below are 4 crucial aspects of effective project management:
  - ▶ **Leadership:** Find a proper leadership style, know how to motivate others, provide positive feedback, and know how to deal with conflict.
  - ▶ **Communication:** Consistently and clearly communicating with everyone involved to coordinate actions, react to changes, and recognize and solve problems.
  - ▶ **Agency Protocols:** Gather as many details as possible from the land management agency pertaining to the land, the project protocol, and safety information.
  - ▶ **Risk Assessment:** Ensure that Project Team members assess potential hazards during all project activities. They should know how to mitigate those hazards as well as the actions to take if an emergency arises.
  
- ▶ **Key Takeaways:**
  - ▶ **Lay out a step-by-step written plan**, from the initial planning of a project, to implementation, to evaluation.
  - ▶ **Schedule frequent meetings with the Project Team**, land managers, and anyone else involved - this gets everyone on the same page, clarifies responsibilities, and maintains structure and communication.
  - ▶ **In addition to the [Outdoor Stewardship Institute \(OSI\) Crew Leadership training](#)**, Volunteers for Outdoor Colorado (VOC) recommends that future Project Managers work under an experienced Project Manager or arrange for mentoring to gain confidence prior to managing a project independently.

# Introduction

**S**ound project management and oversight is a critical component in delivering high quality outdoor stewardship work. Successful management of a volunteer project helps to guarantee a satisfied land manager while providing a worthwhile experience for the volunteers. An effective management process builds efficiencies which allow for additional time and resources for other endeavors.

Public land agencies rely on well-organized volunteer projects to meet their management responsibilities. In the coming years, as land agencies continue to experience resource challenges and increased recreational use, volunteers will serve vital functions in maintaining, constructing, restoring, and protecting natural areas.

Your organization's ability to structure a skilled volunteer group and manage land agency expectations will be paramount to your ability to successfully anticipate and fulfill land managers' needs in addressing their natural resource management priorities.

The objective of this guide will be to outline processes and strategies your organization can apply to help you successfully manage outdoor stewardship projects.

*Please Note:*

*- This guide contains information to help you develop project management strategies. Some of the content is covered in greater depth in other guides, as noted throughout this one.*

*- All of the Stepping Up Stewardship guides are intended to be complementary and not mutually exclusive. You may need to evaluate all the various resources to determine which offer the most appropriate fit for your specific program or project.*

VOC recommends using this guide in tandem with the additional guide found in the [Project Planning Module](#):

- ▶ [Project Selection](#)





# Recommended Steps

**This guide is organized** into six "steps" to help your organization develop and implement project management strategies.

These are not "linear" steps that must be followed in a specific order. Rather, think of them as sections of information that you can choose to implement based on their relevance.

## Step 1:

Outlines the process for scheduling projects.

## Step 2:

Describes the process for assembling a project team.

## Step 3:

Provides guidance for planning and preparing your projects.

## Step 4:

Offers suggestions for pre-project volunteer communications.

## Step 5:

Provides tips and best practices to execute the project.

## Step 6:

Discusses steps to successfully conclude your project.



**This Guide is accompanied by extra resources, called Supplemental Materials, that you can use in your efforts to manage outdoor stewardship volunteer projects.** They are mentioned throughout the guide and listed at the end, but provided separately.

## Step 1: Project Scheduling

**S**cheduling successful outdoor volunteer projects requires deliberate and careful attention. Once your organization has determined the scope of volunteer projects to be offered (see the **Project Selection Guide** for assistance in choosing projects), you will want to create a schedule that is feasible and realistic given your organization's overall project capacity.

Be mindful and attentive to your organization's limitations and capacities - such as your staff or volunteer leadership capacity and availability, length of your project season, amount of equipment and other project resources you have. These considerations will help you avoid overcommitments and compromises in the delivery of satisfactory project work.

**A variety of factors to consider in the scheduling process include:**

- ▶ **When** – Determine when projects will occur by considering:
  - ▶ **Preferred dates** from partner organizations and/or land managers
  - ▶ **Seasonal and geographic considerations** such as inclement weather, high altitude, and difficulties in accessing the project site
  - ▶ **Conflicting events** that could undermine recruitment or affect project objectives, such as holidays, festivals or similar events organized by other groups
  - ▶ **Funding restrictions** for events that must occur within a certain calendar year or fiscal year, or that must meet specific use criteria
  - ▶ **Avoid scheduling** projects in the same timeframe that may target the same audience, or large projects on the same weekend or two consecutive weekends that would strain volunteer recruitment and available resources.
  
- ▶ **Who** – Determine who will manage the scheduling, considering questions such as:
  - ▶ **Is it within the capacity of your organization** to manage the scheduling process?
  - ▶ **Can experienced volunteers assist** or fully manage scheduling?
  - ▶ **Who has existing relationships** with land managers or other partners involved in the project?
  - ▶ **Who has the time** and can make this process a priority?
  
- ▶ **Partnerships** – Strong relationships with partners can be key to meeting common objectives for the project, as well as securing future work and collaborative opportunities. A few tips include:
  - ▶ **Understand the goals and objectives** of every partner involved with the project and how your involvement will help achieve those goals
  - ▶ **Use written communications** between all partners to outline the roles and responsibilities of those involved in the project. This way there are no surprises, and everything is clearly set out ahead of time.
  - ▶ **Set a timeframe** for confirming all calendar dates and resolving scheduling conflicts, then organize and confirm a project calendar as early as possible
  - ▶ **Develop documentation outlining your strategies, goals and successes.** This could be formalized in a "Scope of Services Agreement" (please see a sample in [Supplemental Materials](#)) that defines each organization's role and obligations for the duration of the project, including:
    - Project goals and objectives
    - Materials/tools
    - Volunteer oversight/recruitment
    - Emergency response services
    - Financial obligations



## Step 2: Assembling a Project Team

The project team is a group of people dedicated to planning, managing and implementing the project. It may be comprised of staff and/or trained/skilled volunteers, fulfilling needed roles for the successful execution of the project. Assembling a project team includes identifying project team needs and organizing the project team; for the purposes of this guide, the person responsible for the project's success is referred to as the Project Manager.



See the [Skilled Volunteer Roles & Training Guide](#) in the [Leadership Development Module](#) for additional information regarding the types of roles needed on an outdoor stewardship project.

- ▶ **Identify project team needs.** Developing a defined scope of work and project objectives will help you determine how to develop your team. Consider the following factors:
  - ▶ **The size of the project.** A larger project will require more team-based oversight and assistance.
  - ▶ **Scope of work.** A more logistically complex project will require smaller crews (groups of volunteers) and skilled volunteer leaders, whereas an easier, less technical project, can be accomplished with less oversight, fewer skilled leaders and bigger crews.
  - ▶ **Partner roles and assistance.** Partner organizations may have indicated their ability to fill certain types of roles (ideally identified in the Scope of Services Agreement) and, therefore, may be able to assist in fulfilling some of the project responsibilities with their staff or volunteers.
  - ▶ **Project experiences.** In addition to the actual project work, you may also be providing other experiences during the project such as meals, entertainment, camping and recreation opportunities. If so, consider the roles that need to be filled to support those experiences, such as transportation, meal preparation and technical assistance.
  - ▶ **Project management.** Who will be the one person ultimately responsible for the successful execution of the project? Who will serve in supporting roles?

A complete description of Project Team roles is available in [Supplemental Materials](#).

- ▶ **Organize the project team.** Once you have recruited your project team based on the needs of your project, we recommend that you outline each person's roles and responsibilities and establish clear lines of communication. Be sure to include the following:
  - ▶ **Communication with land management agency or organizational partners to understand capacity and chain of command.** The Project Manager needs to determine the level of involvement other project team members will have with the land management organization(s) and how much autonomy those members will have in making project decisions.



To ensure a good volunteer experience, the land manager and the project team need to share and communicate clear project outcomes. This helps to avoid unnecessary confusion during the project if volunteers hear mixed responses from the project team and land manager about the work they are undertaking.

- ▶ **Organizing meetings, schedules, and communications.** It's important to appoint a person from the Project Team to take on the task of organizing and managing meetings, schedules and communications.

## Step 2: Continued

A "Project Team Meeting Checklist" and "Project Implementation Timeline" are found in [Supplemental Materials](#) to help identify potential topics of discussion.

- ▶ **Delegate responsibilities to leaders.** Hosting project team meetings is useful and recommended. Ideally, these meetings involve all team members, the Project Manager, and the land manager and other partners involved. These meetings help to identify the various tasks and who will complete them and provide agreed-upon deadlines for each task. Project team meetings are intended to ensure project team members and project partners are aligned regarding the project specifics. These meetings can be in-person or via conference call or internet. Agenda items may include:
  - ▶ Overview of project design and land manager expectations
  - ▶ Project logistics – parking, bathrooms, water, food, directions, tools, transport, camping
  - ▶ Safety net and evacuation plan (see the [Policies & Procedures Guide](#) in the [Risk & Safety Management Module](#) for more information)
  - ▶ Determining the number and size of crews and who will lead them; further refinement of the specific crews and their leaders is typically done at the beginning of the actual project day, before the volunteers are organized into their crews.
  - ▶ Designating specific work areas for trained leaders based on their experience and skill levels



When possible, giving more responsibilities to volunteers on the project team will empower them and deepen their engagement with your group or organization. See the [Skilled Volunteer Roles and Training Guide](#) of the [Leadership Development Module](#) for a more in-depth look at recruitment, training and mentoring strategies for leaders.

## Step 3: Project Planning & Preparation

Once the project has been scheduled and the project team assembled, it's time to begin the planning process. Careful planning and preparation will increase the likelihood that the project will be successful, while also preparing a Project Manager to effectively address unforeseen issues. When working in the outdoors, it's common to experience changing conditions and unexpected challenges. Here are a few tips:

- ▶ **Set a timeline for project-specific goals.** A project management timeline is a great tool for staying on track with the many moving parts related to planning a successful volunteer project. Capturing important dates and designating responsibilities to project team members helps ensure that each step of the process is completed.

A copy of a "Project Implementation Timeline" with recommended timeframes for project planning and management components is included in [Supplemental Materials](#).

- ▶ **Schedule pre-project site visits.** In most cases with VOC projects, the first on-the-ground site visits occur while scouting the project during the project selection process. For more information about project scouting, see the [Project Selection Guide](#). Site visits need to also be scheduled once the project teams are in place. These visits give the project team the chance to understand the project scope and logistics such as parking, camping and



## Step 3: Continued

technical difficulty of the project. From there they can make sound decisions about the project flow, schedule and work plan. A site visit can be held any time before the project date, ideally within a month of the project, and it is not necessary for the entire team to attend. Other tasks during a site visit include:

- ▶ Complete the detailed risk assessment for the project
  - ▶ Complete detailed account of the staging and rollout of the volunteer workday
  - ▶ Discuss and make decisions about any last-minute changes to project logistics
  - ▶ Consider any needed additions to tools, equipment, food, water, and other necessities
- ▶ **Plan budgets and logistics.** Just because it's a volunteer project doesn't mean it's free! Many different costs will be incurred in implementing a successful and effective volunteer project, including some of the following:
- ▶ **Providing food and beverages** to hardworking volunteers is a best practice and goes a long way to making your volunteers feel appreciated. Sustaining a volunteer workforce with meals can be challenging and costly; not all organizations will be able to facilitate overnight food preparation, and some may opt to have volunteers bring their own food. Here are a few tips:
    - Create a template for food expenditures that can estimate the cost of food for an individual project or the entire project season; this is extremely helpful when considering how to feed many people.
    - Consider food costs for single-day versus multi-day projects.
      - *Single-day projects:* Provide a light breakfast and seek an in-kind or cash donation for lunch, or provide sandwich-making supplies. Single-day projects are much easier to prepare for because cooking equipment, dishes, storage and cleaning materials are generally not required. If possible, it is a good practice to solicit a lunch request from a nearby restaurant, offering them recognition on the project as a lunch sponsor.
      - *Multi-day projects:* Provide breakfast, lunch and dinner (only if volunteers are staying the night). This is much more complex, especially if your project is remote. You will need to develop a good plan for managing and preparing food safely and having the needed equipment in good working order.

### VOC Mini Spotlight

VOC uses a spreadsheet to estimate the total cost of food for each volunteer per meal per day.

Every year, this spreadsheet is updated for inflation and when the pertinent information is entered, an estimated food cost is generated. Using formula-driven calculations, we can quickly look at what our breakfast, lunch, dinner and snack costs are for a single volunteer, then multiply for the number of volunteers we anticipate we'll need on the project.

Based on our annual food budget, along with the number of projects we will undertake in a given season, we allocate each project a spending target for food costs. The calculations on the spreadsheet help us keep our budget numbers in check and enable us to budget by the project and the people. We give this information directly to the project team member involved in food preparation who then works with the Project Manager to ensure the budget is met with ample food for every project volunteer.

This is just one example of data-driven predictive budgeting that VOC uses. We also use this type of process for vehicle rental, project and training materials and much more. Using this type of predictive and data driven approach can help your organization be best prepared for annual budgeting and when you need to come up with numbers for grants and other funding opportunities.

## Step 3: Continued

- ▶ **Provide tools, materials, and equipment.** Identifying the tools, materials and other equipment needed to facilitate a volunteer project will depend on the type of work being done and the organization's inventory of such items. When working with partner agencies or land managers, create a clear line of communication to determine who is providing what.

Questions to ask include:

- ▶ **Who is responsible?** While conducting the pre-project meetings, it will be imperative to identify who will provide the tools for the volunteers and the materials for the project work (if needed). Many land management agencies do not have the quantity of tools necessary for many volunteers, so they tend to rely on the volunteer organizations to provide their own tools. If your organization needs to provide all tools and other equipment, you will need to organize a way to transport these items.
- ▶ **Are vehicles available?** Having access to a vehicle or vehicle fleet to support projects is beneficial, as it allows more freedom and flexibility than renting, and may save money in the long run. If your organization can use its own vehicle(s), determine whether volunteers will be allowed to operate the vehicles.
- ▶ **What is the vehicle rental capacity?** It is possible to rent vehicles to assist with the transport of tools and equipment if your organization does not have access to a vehicle. Thoughtful advanced planning and scheduling are required when renting vehicles for projects.
- ▶ **Do volunteer drivers have insurance?** If you are providing transportation of tools and equipment, your organization will want to make sure that all necessary insurance is in place, particularly coverage for all tool truck drivers.



Materials such as hardware, plants, crusher-fines and other items necessary to accomplish project task can come with a significant price tag if they are needed. Additionally, project support items such as portable toilets may need to be rented depending on project location. Make sure you understand what types of additional materials and equipment are needed to be paid for as early as possible during the project scouting and site visit process and who will be responsible for coming up with the budget to procure them.

- ▶ **Seek in-kind donations for food, equipment, and materials.** Volunteer organizations rely heavily on donations to sustain project needs. Donations help reduce the overall budget, provide equipment, materials or food, enhance the volunteer's experience through gift giveaways, help in acquiring new memberships, and provide an effective product incentive when soliciting volunteer survey participation. There are two types of in-kind donations that VOC requests:
  - ▶ **One-time donation of goods.** A common one-time donation is coffee. It is a simple process to call a local coffee shop and ask if they would like to donate to a specific project (many shops budget a certain amount to donate every year). One-time donations of lunch, drinks and snacks are a great way for retailers to give exposure to their products and support a good cause. Other retailers may be willing to provide one-time donation or discounts on tools and materials to nonprofits and community organizations.
  - ▶ **Season-long donation of goods.** This is a much larger request that requires a bit of research and legwork. You must identify exactly what your specific organizational needs are, and research what types of businesses may have the resources and organizational alignment to support those requests. Donations of this type are received periodically throughout the season and go a long way in offsetting associated costs.



## Step 3: Continued



Be sure to track these donations for tax and other purposes and develop a plan to send an informational thank you letter explaining how the donation was used. This is also a great way to continue an annual relationship.

- ▶ **Start volunteer recruitment early.** People lead busy lives and many plan their activities far in advance. Begin the recruiting process for project-day volunteers as early as possible. It is also important to develop a strategy to minimize cancellations and no-shows to your project if you choose to use a registration process.



See the [Recruitment Methods Guide](#) in the [Volunteer Engagement Module](#) for more information about effectively recruiting volunteers.

When communicating with volunteers, set a schedule for pre-project and post-project communications steps. What information do you need to get out to your volunteers who have committed to or registered (if using a registration process) for a project? You will need to repeat information to ensure that important messages – including directions, what to bring, and what to expect – make it to your volunteers. More information about volunteer communication can be found in [Step 4](#).

VOC requires a "Project Risk Assessment" form be used during the project management process; this form is included in [Supplemental Materials](#).

- ▶ **Conduct risk assessment.** Safety is the number-one concern when working with volunteers in the outdoors. For this reason, there is a wide range of protocols a Project Manager should follow when overseeing a volunteer project. When conducting the risk assessment, here are a few key concepts to remember:
  - ▶ **Land manager requirements regarding volunteers.** Land managers, especially government agencies, will have safety criteria and other legal requirements for working with volunteers on their land. It is very important to address these requirements in pre-project meetings with the volunteer project team and the land manager representative(s).
  - ▶ **Organization capacity for medical services.** A Project Manager should have at least a basic level of First Aid certification; a wilderness-based First Aid course is preferred. If working regularly in the remote backcountry, the Project Manager may need to carry a Wilderness First Responder certification. Every project should be equipped with several First Aid kits, and each volunteer leader with a group should have a First Aid kit.
  - ▶ **Land manager support for medical services.** Require the land management partner to provide emergency medical services for remote projects that pose a significant risk level for volunteers.
  - ▶ **Nearest medical facility and medical training on-site.** Identify the proximity of the nearest medical facility. The Project Manager should identify who on site has medical training, what level is required (e.g. Emergency Medical Technician, Wilderness First Responder, etc.) and make sure that all members of the project team know who that is.
  - ▶ **Immediate hazards in the project area.** Conduct at least one in-depth, on-site risk assessment. Develop a risk assessment plan as part of the site visit with the project team that is also supported/approved by the land manager. Then provide the plan to the volunteer leaders on project day to discuss with their volunteer group.
  - ▶ **Safety talks with volunteers.** Discuss safety concerns, tool use and evacuation protocols with volunteers, and identify any medical conditions volunteers may have, and ensure that volunteers have all signed liability waivers.

## Step 3: Continued

- ▶ **Safety Net.** The term "safety net", used by VOC, is essentially an emergency response protocol.



More specific, detailed information about the on-project safety net and other risk assessment protocols can be found in the [Risk & Safety Management Module](#).

## Step 4: Pre-Project Volunteer Communications

**C**ommunication with volunteers before the project begins is a key component to ensuring a successful turnout. A diverse group of people are volunteering, and each will have their own preferences for how information is presented. Being thorough in your approach and repeating or highlighting critical information will be helpful to ensuring good communications.

Here are a few things to remember related to pre-project communications:

- ▶ **Establish a specific timeline and objectives.** Determine when you will be sending volunteer communications out via email and identify what you want the outcomes to be.
- ▶ **Use project information templates and project communication templates.** Before the project season begins, update your project communication templates and messaging. The templates become the basis for providing in-depth information to registered volunteers regarding project logistics. Using templates will save you time and effort down the road when you may be busy with other project details.

"Pre-Project Communication Templates" are available in [Supplemental Materials](#).

- ▶ **Hold a Project Team pre-project conference call/meeting.** Typically held within one week of the project date, this is a chance for the project team to share critical information with the additional volunteer leader(s) who will work directly with the volunteers. Items to be covered in this meeting include:
  - ▶ **Site/scope of services agreement verification:** Verify the scope of services agreement and ensure that all agreed-upon details are met. Review the site visit and discuss pertinent information with the entire project team.
  - ▶ **On-site project team orientation:** Arrange a time for the project team to meet on the project site before the project starts. Invite partner organization/land agency representatives to attend this meeting for a final walk-through and discussion about the project objectives.

### VOC Mini Spotlight

Once a volunteer signs up for a project, the first communication back to them is an automatic reply:

*"If you have signed up for a volunteer project, you will receive a thorough e-mail from the VOC Project Manager within 2 weeks of the project that will provide more details about the work you will be doing, a list of things to bring, directions to the meeting spot, and any other important information you may need.*

*If you are registering within 48 hours of the project start time, please call the appropriate VOC office to make sure you receive information about where to go and what to bring.*

*If you realize you must cancel or update your registration numbers between now and the event, please call the VOC office."*

Once the initial automatic reply goes out, the Project Manager assumes responsibility for communication with the registered volunteer, using the pre-determined timeline as a guide.

## Step 4: Continued



For more in-depth guidance on pre-project volunteer communications, see the [Recruitment Methods Guide](#) of the [Volunteer Engagement Module](#), and the [Community Outreach Guide](#) of the [Marketing & Communications Module](#).

## Step 5: Project Execution

**E**xecution of the project is the most encompassing portion of project management. Below is a set of best practices and checklists that can be referenced when managing a project.

- ▶ **Project checklist.** The Project Manager is the one responsible for assembling and transporting the project administration and support materials to each project or ensuring that someone else does. To help foster good organization around this important logistical task, create a checklist of needed materials and equipment, which will vary from project to project. The following tips can help direct decision making around what will be required:
  - ▶ **Clearly outline the scope of work/volunteer numbers.** This information will dictate the types and quantity of tools needed. As previously explained in Step 3, you will need to discuss these needs with partner organizations as well as the designated tool manager (if you have one) on your project.
  - ▶ **Identify food preparation needs.** Food preparation requirements should have been covered in the pre-project planning process, and at this stage you should only reference this as a last-minute checklist and transport item. You may need to confirm pickup of food for breakfast or lunch.
  - ▶ **Medical supplies and emergency plan.** Double-check all safety measures and risk assessments.

The "Project Manager Packing Checklist" is available in [Supplemental Materials](#).

- ▶ **Equipment preparation and transport.** Proper loading and transportation of food, tools and other equipment ensures a successful project, reduces the risk of injury to others, and mitigates unnecessary costs associated with improperly transported materials. Follow these tips:
  - ▶ **Double-check estimated quantities of tools/food for a volunteer project.** The scope of work and number of volunteers described above may have changed in the time leading up to the project day. Be sure to confirm the scope of work and the final volunteer count at the latest possible moment to adequately adjust quantities of tools and food.
  - ▶ **Determine appropriate transportation.** Depending on the scope of work, the size of the project and your organization's capacity, transportation needs could vary quite a bit. You can transport equipment using a large box truck, a pickup truck or a compact car. Safety is always the number-one concern.
  - ▶ **Ensure proper storage for equipment transport.** Tool and equipment loading is like mastering a puzzle. Every piece in its place for optimum safety and efficiency in storage. Trial and error will lead you to be a master at this but here are some trade-tips that work well to avoid unnecessary frustration!
    - Assembling a number of people to help in tool-loading is a good strategy (many hands make light work)! You may want to announce the time of the tool-loading at the project team leader meeting. The Project Manager may also list the time and location of the tool loading in the project schedule.
    - The tool manager or Project Manager should have a detailed, specific list of needed tools no later than one week before a project.



## Step 5: Continued

An example of a detailed tool list template that VOC uses for each of its projects is included as a "Tool Requirements Worksheet" in [Supplemental Materials](#).

- Load the tools and equipment into the tool vehicle in chronological order of their anticipated project use. For example, if you have cooking equipment and know you will need to prepare food immediately upon arrival at the project site, load those pieces LAST so they can be easily accessed.
- ▶ **Ensure proper storage for food transport.** Follow food safety guidelines regarding transportation of perishable items. Effectively organizing food and labeling containers will create an easier project kitchen set up and layout.
- ▶ **Ensure safe loading of equipment.** Request assistance with loading and unloading, especially heavier items, and recognize the abilities of all participants. Again, safety is essential.
  
- ▶ **Work assignments.** A meeting of the project team at the beginning of the project day is an important final step to establish and fill the roles that will be needed for the project. Here are some tips when assigning work:
  - ▶ Volunteer crew leaders on the project team can be assigned to crews based on their level of knowledge/skills and relevance to the planned work. At this time, the project team should identify specific crew sections of the project that will require volunteers with specific skills, experience and physical abilities.
  - ▶ Consider allowing individual volunteers to self-select the crews they want to join on projects based on the type of work the crew will do, distance to the work site, or difficulty of accessing a particular area. Occasionally, groups of volunteers will want to work together. Project team members should be careful to verify that volunteers for crews assigned to technically and/or physically challenging sections of the project are appropriately prepared for and clearly understand the demands of that work.
  - ▶ When determining working group size, consider the scope of the work to be done at each section, the skill levels of the volunteers, and the volunteer leader's experience.
  - ▶ Volunteer groups must adhere to a high degree of safety in the field. It is mandatory on VOC projects that volunteer leaders discuss safety concerns with the volunteer crews they will be working with before the actual work begins. In addition, land managers may have their own expectations and documentation regarding safety.
  - ▶ Assigning a large group of individuals to working locations requires clear, concise communication that details expectations and provides direction. This communication can be complex and hard to follow, especially for new volunteers. If you are new to this type of process, you may want to outline it in writing according to the specifics of your project for the first few times and seek assistance from your experienced volunteer leaders.



*The safety talk, including proper tool use, that is provided on all projects by VOC is taught in much greater detail in our Crew Leadership for Trails and Crew Leadership for Ecological Restoration trainings, offered through our Outdoor Stewardship Institute (OSI). Visit our website at [www.voc.org/osi](http://www.voc.org/osi) for more information about how to register for these trainings.*

- ▶ **Volunteer check-in.** The Project Manager or a member of the project team should be prepared to check in/register each volunteer at the beginning of a project. VOC does this at a physical registration table. This is an important step to verify each individual volunteer who will be working on the project and that each has completed the necessary liability waivers. This may be the first time new volunteers will meet a member of your organization face to face – they may want to ask questions and receive a brief orientation about what to expect during the

## Step 5: Continued

project. The individual(s) staffing the registration table should be prepared to answer questions and provide any necessary materials for registration. Suggested items to display or provide during registration include:

- ▶ Pre-project volunteer information (a roster with a list of each volunteer who registered in advance; this can be used to verify attendance of volunteers when they arrive)
  - ▶ Liability waivers (ensure that each volunteer has filled out and signed one)
  - ▶ Extra registration materials (waivers, registration cards, info cards)
  - ▶ Organizational information, marketing pamphlets/ brochures, stickers and other swag
- ▶ **Welcome speech.** Once registration is complete, the Project Manager can address the volunteers. This is a unique opportunity for your organization to thank volunteers, provide more information about your organization and encourage future involvement. Things to consider when addressing a volunteer group:
- ▶ **Audience/timing.** Develop your talking points to the audience. Whether it is a large group of new volunteers or a small crew of hardened, veteran trail builders, striking the right tone and focusing on the right subject will go a long way toward making your organization and work relevant.
  - ▶ **Main message.** Define the critical points you want to address regarding your organization and the project's work. Document these talking points ahead of time, and make sure that anyone who will be representing your organization knows these points.
  - ▶ **Recognition and appreciation.** Make it a point to thank your volunteers as many times as possible. A note of genuine appreciation will go a long way in making volunteers feel welcome and valued. See the [Making Volunteers Feel Valued Guide](#) in the [Volunteer Engagement Module](#) for more ideas on how to show your appreciation.
- ▶ **Project documentation.** Thorough reporting of project accomplishments creates a valuable cache of information that your organization can reference for future use. Many stewardship projects have partners, including funders, who are interested in your overall impact, seeing pictures and hearing about experiences from the project. Many require a well-documented report of outcomes and accomplishments as well. A few things to consider when documenting a specific project include:
- ▶ **Taking photos.** Volunteers who attend the projects and work hard enjoy seeing pictures a few days later to remember the experience – and are often happy to share the photos on their own social media networks. Capture before-and-after photos whenever possible to demonstrate what a difference the work made.
  - ▶ **Summarizing project accomplishments.** The ability to report out to partners and funders is a key component of a successful project. Establish the important metrics that need to be collected in advance of the project and create a process for recording data during the project to document accurately the objectives that were accomplished.
  - ▶ **Capturing lessons learned.** Almost every project will have its challenges and successes. Noting what worked and where changes will be necessary will help inform future projects.

### VOC Mini Spotlight

VOC has a well-established registration process. We start with an online registration process collecting key information about the volunteer, including name, address, email, and their signed electronic waiver. We follow up with regular and informative electronic communications regarding the project. We create a list of registered volunteers and provide that to the Project Manager. Once volunteers arrive on a project, we ask them to check in with their name at the registration table.

This way, we can track and report on our volunteer numbers, hours and overall attendance. We are also able to track no-shows and attrition rates. All these data points help us tell the story of our volunteer recruitment, retention and engagement and provide important evaluation tools for organizational improvements.

## Step 5: Continued

- ▶ **Ongoing monitoring.** Continue to monitor on-the-ground project accomplishments if possible – this can be an effective and informative way of understanding the long-term success and impacts of a project.
  
- ▶ **Volunteer engagement and experience.** Interacting with volunteers while on a project should be one of the Project Manager's main priorities. Creating rapport with volunteers enables the Project Manager to collect valuable feedback and gauge how well the project is progressing. While completing the designated work is important, it may not always be possible. The Project Manager must also keep volunteer satisfaction and the volunteer experience in mind and adjust accordingly. Keeping a pulse on the day's progress, in terms of communicating with the land manager and assessing the efforts of project volunteers will help ensure overall project satisfaction by all parties. Here are a few tips:
  - ▶ **Management interaction.** Make it a point to visit as much of the project area as possible and check in on volunteers throughout the day. Take time to get to know the people who are donating their time – they will remember and appreciate it.
  - ▶ **Organizational information.** Volunteers will have a lot of questions; walking around interacting with them creates opportunities for you to address those questions. Make it a point to have informational material on hand to offer not only to volunteers, but to other people you may encounter who are using the public space and are interested in learning more about your work and organization. Also, create a method for collecting questions and contact information from volunteers and other interested parties to follow up after the project.
  - ▶ **Oversight and coordination.** When collaborating with a variety of organizations on a project, such as land managers and other outdoor stewardship organizations, it is important to establish a decision-making process about how you will each interact with the volunteers during a project. This is especially important to be mindful of who has the authority on your project team to direct the technical work being done by your volunteers. You will want to avoid having volunteers hear conflicting information and having to re-do their work.
  
- ▶ **Donation request.** If you represent a nonprofit organization, you know that fundraising is a top priority and projects offer unique times in which you may want to ask for financial support in addition to their donated time. People gifts of time and talent are essential. However, contrary to popular belief, volunteering is not free! All the work that goes into planning, implementing and reporting accomplishments as well as tools, transportation, materials and supplies have tangible costs. Making your volunteers aware of this during a project and asking for a financial contribution to help offset these costs is a good way to bridge your work between volunteers and donors.
  
- ▶ **Thank-you.** At the end of each project, it is essential to thank volunteers for their work and contributions, recognize project donors, sponsors and partners for their support, and let people know about upcoming ways to stay involved. Often VOC gives away volunteer swag via a volunteer prize drawing. Remember that there are a million and one ways to say, "thank you"! A few other ideas to include while thanking your volunteers include:
  - ▶ Mention future projects they can participate in





## Step 5: Continued

- ▶ Highlight opportunities to stay involved including events or programs
- ▶ Discuss additional ways volunteers can support your work including trained leadership and stewardship education



See the [Making Volunteers Feel Valued Guide](#) in the [Volunteer Engagement Module](#) for more information.

## Step 6: Project Wrap-up

**A**t the end of a project, there are several wrap-up tasks:

- ▶ **Immediate post-project tasks.** At the project site as the work completes, you may want to seek assistance from volunteers and project participants for the following:
  - ▶ Equipment clean-up and storage
  - ▶ Food storage
  - ▶ Transportation of materials and unloading of tools, including:
    - Loading all tools, food and other equipment into trucks and other transportation vehicles at the project site
    - Encourage volunteers to assist the project team in helping to unload
    - Unload all coolers and food bins that may contain perishable food
    - Get an inventory of leftover food that can be used on upcoming projects
    - Flag all broken tools or equipment with flagging tape and a description of what needs to be fixed
- ▶ **Data entry.** During project planning you will have defined which metrics and data you will be tracking on the project – both for your own records and for sharing with partners and funders. At the end of the project, we recommend capturing these data points and metrics in one location where you can access them easily in the future. Ideally, you will have a way to capture project level as well as aggregate level information. Examples of categories of metrics include:
  - ▶ Volunteer metrics
  - ▶ Project accomplishments
  - ▶ Lessons learned
- ▶ **Thank-you email and feedback.** Send an email to all project participants to thank them for their hard work. In your email, be sure to also detail the work that was accomplished and solicit feedback by linking to a project survey or giving the volunteer an easy way to provide anonymous feedback.
  - ▶ Include the project location, date, summary of work accomplished, and a list of partners who were involved and/or made the project possible
  - ▶ Highlight any fun or interesting things that may have happened on the project
  - ▶ Options for staying involved including a call to action specific to your needs (i.e. volunteers for an upcoming project, event attendance, trained leadership)
  - ▶ Opportunity to provide feedback anonymously
- ▶ **Project photos.** Share the experience with those involved by posting photos via your various communications channels. See the [Community Outreach Guide](#) in the [Marketing & Communications Module](#) for guidance on this.

A "Post Project Thank You Email Template", Post-Project Survey", and "Sample Facebook Posts" are included in **Supplemental Materials**.

## Step 6: Continued

- ▶ **Project team feedback.** The project team made your project happen and you will want to get their input on what worked and what needs to be adjusted in the future. Create and send out a survey to gather feedback from these trusted volunteers about their project experience, then use this information to make necessary changes to your process and projects.
- ▶ **Land manager feedback.** The land manager's experience in working with you and your volunteers is an important part of your ability to keep organizing volunteers to provide needed stewardship work. Find out what you can do to improve efficiencies and what learning opportunities exist for you and your project team from the land manager's perspective. Again, an anonymous survey or other tool to provide feedback (good and constructive) is a best practice.
- ▶ **Time management.** All the post-project work takes time and can become a challenge during the peak of your project season when everyone is busy. Create systems and processes that make this final part of your project management work easier on those responsible. Check-in with people to ensure they have what is needed to make these tasks go smoothly.





# Conclusion

**T**his guide provided tips, ideas, and best practices to help your organization start or expand its strategies around effective project management. It included tips and guidance for various parts of the process.

A list of Supplemental Materials is provided below.

- ▶ **Scope of Volunteer Services Agreement**  
This document defines the scope of service and outlines the project responsibilities of Volunteers for Outdoor Colorado (VOC) and Project Partner with regards to the project.
- ▶ **Project Team Roles**  
Roles and responsibilities of potential members of the project team. This document should be reviewed by Project Manager to decide which project team roles are necessary for the project. Not all roles will be applicable for every project.
- ▶ **Project Implementation Timeline**  
Comprehensive timeline of tasks from project selection to project closeout.
- ▶ **Project Team Meeting Checklist**  
List of items to consider for site visits, emergency plans, and all project team roles on a given project.
- ▶ **Project Risk Assessment Form**  
This document serves as an outline to be filled out by the Project Manager or crew leader manager to detail the risks associated with the project and the emergency safety net.
- ▶ **Pre-Project Communications / Pre-Project Information**  
Includes VOC's first and second pre-project emails to volunteers, featuring detailed information about where to go, what to expect, and contact, cancellation, and waiver information.
- ▶ **Project Manager Packing Checklist**  
List of materials that the Project Manager is responsible for bringing to a project. The materials listed are suggested and will vary from project to project.
- ▶ **Tool Requirements Worksheet**  
This spreadsheet should be filled out by the Technical Advisor and outline what tools each crew will need to complete the work. This should be given to the Tool Manager a week out from the project so they know what needs to be packed during the tool load.
- ▶ **Post-Project Surveys**  
Includes VOC's post-project evaluation surveys for collecting Project Team feedback as well as Land Manager / Partner feedback.
- ▶ **Sample Facebook Posts**  
Examples of VOC's post-project Facebook posts including project photos and accomplishments.
- ▶ **Post-Project Thank You Template**  
This email details the work that was accomplished, solicits feedback from volunteers by providing a link to the project survey and thanking them for all their hard work.



Check out the rest of the guides for  
**Project Planning**

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Project Selection

Project Management

