

MEMBER ENGAGEMENT

PVT HANDBOOK



**A collection of resources for your
Parish Volunteer Team**

PARISH VOLUNTEER TEAM MISSION STATEMENT

Live our Catholic faith.

Serve our Catholic community.

Support Catholic education.

Parish Volunteer Teams serve as the local platforms for funding and encouraging faith-based education and faith-fueled volunteer service for every generation. As a Parish Volunteer Team, it is crucial to find a mission that encompasses your values and expresses why you come together to do this work for your parish and community.

Consider discussing how you plan to live your faith, serve your community, and support Catholic Education through your work as a Parish Volunteer Team and use the starters below to brainstorm your ideas:

We will live our Catholic faith by...

We will serve our Catholic community by...

We will support Catholic education by...

THINGS TO KNOW ABOUT BEING A PVT

Tax Information

Each Parish Volunteer Team is assigned a Tax ID number to use for all team-related purchase. Catholic United Financial files your team's 990N with the IRS and will maintain the 501(c)8 designation.

Catholic United is not a tax-exempt organization and as such, Parish Volunteer Teams also do not have tax-exempt status.

For reference, your Parish Volunteer Team Tax ID number is _____

Checking Accounts

Parish Volunteer Teams must maintain an autonomous account (checking) for team funds. The Member Engagement Department will use this account information to directly deposit funds for programs throughout the year. The Administrative Coordinator and Team Director should be authorized to sign checks, but their names do not need to be included on the checks themselves. Checking accounts should be named in the following manner:

St. Isidore PVT #760
Catholic United Financial
Lake Wobegone, MN 56789

It is recommended that the group keep a small cushion of funds at the end of each year to support your activities for the start of the next calendar year.

If your team would like to set up an account with the Catholic United Financial Credit Union, please contact the Member Engagement Department for more information.

Leadership Stipend

In the first quarter of every year, Catholic United Financial will send a leadership stipend to the team in the amount of \$500 (or \$100 per team leader if there is not a full roster of team members). This stipend is meant as a 'thank you' for the hard work you have done the previous year to support your local faith community. Catholic United encourages that this money be used for team development but does not place any restrictions on how the team spends the stipend.

Annual Delegate Convention

Catholic United is governed by its members and as such, delegates to the annual convention make up the governing body of the Association. At the convention, delegates vote to make changes to the *Constitution and Bylaws of Catholic United Financial*. Each Parish Volunteer Team, regardless of size, is entitled to two delegates at the convention. Delegate allocation is increased by one for each 125 adult members assigned to the team. At least one delegate from each team is expected to attend the convention each year. The annual convention is held between August 1 and September 30.

PARISH VOLUNTEER TEAM PROGRAMS

Grants4Good

Grants4Good is a program that allows Catholic United to provide funds to our Parish Volunteer Teams that enhance events in parishes and communities. By offering grant opportunities in the areas of social, service, and faith, Catholic communities can thrive and grow in many ways.

Parish Volunteer Teams are eligible to receive up to a total of three grants, up to \$500 per activity, in each of the following Grants4Good categories:

- A social-based grant helps create an opportunity or enhance an existing event that supports and encourages family, fellowship and community.
- A service-based grant helps create an opportunity to bring people together to perform a service or complete a project.
- A faith-based grant helps create an opportunity for spiritual growth or faith development in the parish or community.

Matching Grant Events

Build community among members and friends of Catholic United by holding a fundraiser in your community and Catholic United will match your efforts with funds to support religious education.

Catholic United Financial provides up to \$1000 in matching funds each year for Parish Volunteer Team sponsored fundraisers with the matched funds going to support religious education in some way. Matched funds are based off gross income for an event and are paid 50¢ for every dollar, up to \$1000.

MinisTREE

MinisTREE helps parish communities in three distinct ways: completing needed tasks throughout your community, growing your volunteer base, and the additional bonus of funds. For every 25 tasks identified, completed, and submitted, Catholic United will provide \$100 to your parish. Raise up to \$400 a year while fulfilling unmet needs in your parish and growing your volunteer base.

Member Assistance Grants

Supporting a Catholic United Member in need of financial assistance due to hardship.

Catholic United Financial provides up to \$1000 in matching funds for Council and Parish Volunteer Team sponsored fundraisers that support a Catholic United member in need of financial assistance due to some recent hardship. Councils and Parish Volunteer Teams can hold multiple Member Assistance Grants in a year and the \$1000 is matched dollar for dollar for each event held throughout the year.

PARISH VOLUNTEER TEAM ACTIVITIES

Activities

The goal of the Parish Volunteer Team is to support your parish and community in a variety of ways. Activities that bring people together, enhance and grow the spiritual vitality and faith of your community, and provide needed services to others are the core of what your Parish Volunteer Team will do throughout the year.

Social Activities

A social activity brings people together, creates fellowship, and builds a strong relationship between your team and the community. Social activities are a chance for celebration and a time to come together.

Faith Activities

A faith-based activity enhances the spiritual life of the local faith community and provides opportunity for spiritual development. Faith activities coordinated by the team encourage growth among adults and youth and brings together the community.

Service Activities

A service activity unites members and non-members in achieving a goal toward a greater good. The purpose of service activities put on by the team is to go out and do something to support the parish and community.

Communications

An excellent way to ensure the community is aware of the works the team is doing throughout the year is to spread the word about the team's impact in the community. Newsletters, mass emails, websites, and Facebook pages are excellent ways to share the team's story and get members of your faith community engaged and involved.

Donations

There are many worthy causes to support financially. The team should consider where they would like to direct their funds throughout the year to both support its activities and make contributions.

For a list of groups Catholic United has worked with and encouraged groups to contribute to in the past, contact the Member Engagement Department.

Activities also include the programs available to the Parish Volunteer Team (included on page four of the handbook). Making use of these programs can help plan your activities throughout the year, bring people together, and promote Catholic United Financial and the work your team is doing to all parishioners and your community.

Star Status

Each year the Parish Volunteer Team will be awarded a star status based on the number of activities, donations, and meetings throughout the year. The number of activities and donations the group carries out is entirely up to each individual team but holding at least four meetings per year is expected of all Catholic United groups. Star status will determine the calculation for the team’s activity allowance each year.

Carrying out social, service, and faith activities as well as putting together team communications and donations to the parish and community (as outlined on the previous page) will help ensure that the activities the team does throughout the year are eligible to receive star status. Activities that are eligible to receive star status will be determined at the discretion of the Member Engagement Department.

The criteria for whether an activity/event/donation counts toward star status is based on the following questions. If the answer is yes to at least one of these questions, the activity can be counted toward star status for the year:

- Would the event happen if not for the existence/involvement of the group?
- Were income and/or expenses managed by the group?
- Did the group provide volunteer coordination?
- Did activity promotion include information about Catholic United Financial involvement?

Activity Allowance

The Parish Volunteer Team will receive an activity allowance in the first quarter of every year to help support their upcoming activities. The activity allowance is based on the previous year’s work and is calculated by the number of meetings held and star status-eligible activities and donations. The amount paid to the group is calculated based on the team’s star status (see the chart below) and the number of adult members (16 and older) assigned to the Parish Volunteer Team.

Star Status	Activity Required		Amount
	<i>Meetings</i>	<i>Activities</i>	<i>Per member</i>
Semi-active team	1	1	\$1.00
Active team	2	4	\$2.00
Silver team	4	8	\$2.50
Gold team	4	12	\$3.00
Platinum team	4	12*	\$3.00

**one must be a Grants4Good service activity*

TEAM DIRECTOR DESCRIPTION

Summary of Position

The Team Director is the leader of the Parish Volunteer Team. Other members of the team will look to you for guidance and delegation. As Team Director, the responsibility falls to you in calling the meetings, maintaining positive relationships with parish and school leadership, and appointing an auditor to review the financial statement annually. You are the main contact with your local sales representative.

Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Seek opportunities for the spiritual development of your team (workshops, retreats, events, etc.). Incorporate your team’s religious theme (patron saint) when possible.
- Call and run a *minimum* of four meetings a year
 - Must be in person
 - Set the agenda
 - Invite parish/school leadership (follow up with them if they are unable to attend)
 - Invite local sales representative (follow up with them if they are unable to attend)
- Set goals for the year and work with the team to achieve them.
 - Fundraising totals
 - Increase in membership
 - Star Status
- Meet with parish/school leadership at least twice a year.
 - Assess parish/school needs and discuss how the Parish Volunteer Team can help
 - Share goals and calendar of events; solicit parish/school support if needed.
 - Include Member Engagement Department staff if desired.
- Regular check-in with Parish Volunteer Team members
 - Keep projects moving
 - Work to resolve any issues relating to their position.
 - Recognition/evaluation of volunteer work
- Regular check-in with the Member Engagement Department twice a year
 - Parish insight
 - Opportunities/changes
- Appoint an auditor (cannot be related to you or the administrative coordinator, must be a Catholic United member)
 - Share the annual financial statement for his/her review and signature.

TEAM DIRECTOR TOOLS

Meeting Requirements

To be considered an active team, you need to have at least four meetings per year. You may decide it necessary to have more than four to be sure to accomplish everything you set out to do. It is the duty of the Team Director to plan and call the meetings, however, this position does not necessarily need to lead every meeting.

The Parish Team must have at least 5 members present to constitute a quorum for the transaction of business. If there is not a quorum, financial actions may not be taken.

Meeting Preparation

It is in the best interest of the team to do an annual planning meeting at the beginning of each year to schedule all team meetings and set goals for the upcoming year. Be flexible.

In preparation for each meeting, it is the responsibility of the Team Director to remind the team and to contact the local sales representative and parish leadership (priest, principal, director of religious education, etc.) to invite them to attend. Potential agenda items should be solicited at this time as well.

Contact the Administrative Coordinator to get a copy of the previous meeting's notes. Use this as a guide to track progress and help set the agenda for the upcoming meeting. See sample agenda below.

Send the agenda and previous meetings notes to the entire team at least one week in advance via email. This allows people to finish up any deliverables from the last meeting and to consider any proposals that will be presented at the upcoming meeting.

Making a meeting concise, productive, and positive doesn't happen on its own. Put in the work upfront; you'll thank yourself later.

Goal Setting

Setting goals should be an important agenda item for your first Parish Volunteer Meeting of each year. Goals should be achievable, measurable, and have lasting impact.

Appointing an auditor

It is the responsibility of the Team Director to identify and appoint a member of Catholic United Financial as an auditor at the beginning of each calendar year. The home office should be notified via the team roster that is filled out and turned in before Feb. 15th of each year.

- Must be a member of Catholic United Financial for at least one year before being appointed
- Cannot be related to the Administrative Coordinator or the Team Director

Managing the Parish Volunteer Team

The most important reason people across all generations volunteer with an organization is because it supports a cause they care about. To maintain an efficient, dedicated team, it is important to know your mission and promote it through your activities and interaction with parishioners and the community. Recruiting new volunteers and members is an important part of keeping the vitality of the group going.

Recruitment

- Ask someone you think would be best for the position, not just anyone who will say, "Yes."
- Set up a face-to-face meeting to discuss the opportunity (over coffee or a meal).
- Tell them why you think they would be a good fit.
- Be specific about volunteer expectations and time commitments (see position description).
- Be persistent, but don't be a nuisance. Persistence is not pushy. Set-up a meeting, don't stake out their house and ambush them to talk about the open position.
- "No." doesn't mean "No, never." It could mean, "Not right now." Keep them in mind for future vacancies, and don't be afraid to ask again.
- The number one reason people don't get involved with a cause is because they weren't specifically asked. People want to volunteer, but more than that, they want to feel needed and appreciated. At the very least, they will be flattered that you thought of them.

Appointing Team Members

Each team member agrees to serve for two years in their position and may choose to recommit to the position for at least three consecutive terms. After six years, team members must take a year off from the team before seeking another position. As the Team Director, it is important to monitor the timeline for each member of the team to ensure that preparations are being made for a member stepping down from their position.

If throughout the course of the year, a team member needs to step away from their position, a written resignation should be submitted to the Team Director. Each team member is responsible for recruiting a replacement to be appointed to fill the vacancy.

Please contact the Member Engagement Department for guidance on dealing with any difficulties with team positions.

ADMINISTRATIVE COORDINATOR DESCRIPTION

Summary of Position

The Administrative Coordinator of the Parish Volunteer Team is responsible for managing team information. You will be working closely with the Member Engagement Department of Catholic United Financial to ensure that team activities and projects report correctly. The Parish Volunteer Team looks to you for understanding and knowledge of the guidelines of Member Engagement Programs. You will manage the checking and/or savings account for your team. Other responsibilities include keeping notes of meetings and reporting to the Member Engagement Department when needed. You act as the primary contact for messaging and updates from the Member Engagement Department and it is your responsibility to share those messages with team members.

Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Maintain working knowledge of the Member Engagement Programs offered through Catholic United Financial
 - Follow the guidelines as outlined for various programs.
 - Reach out to the Member Engagement Department for assistance or training as needed
- Manage checking/savings accounts.
 - Will assist the auditor annually.
- Submit documentation to the Member Engagement Department of Catholic United Financial
 - Utilize Isidore Online Activity Tracking System to submit activity alerts along with any necessary publicity prior to events (ie. publicity pre- and post- event as provided by the Publicity Lead)
 - Utilize Isidore Online Activity Tracking System to confirm activities with information about volunteer hours, financial outcomes of events as required by program guidelines.
 - Complete and submit a balanced annual report through the Isidore system, detailing activities and any income/expenses associated with them.
- Maintain contact lists and membership lists for your team.
 - Work with Volunteer Lead to update volunteer contact lists
 - Receives updates about new and transferred members to the team from the Member Engagement Department
 - Work with the Volunteer Lead for welcoming duties.
- Maintain contact list of team members and keep the Member Engagement Department informed of any changes to the team through Isidore.

ADMINISTRATIVE COORDINATOR TOOLS

Reporting Activity

To best-serve your Parish Volunteer Team, we are asking the Administrative Coordinators to submit all activities of the group to the Member Engagement Department in advance of the activity date. Our online activity tracking system (Isidore) is the primary tool for Administrative Coordinators regarding events and activities. Contact the Member Engagement Department with questions regarding online reporting, for access to the system, or for training as needed.

Four Weeks Prior to an Event

Entering your upcoming activities prior to the activity date allows the Member Engagement Department to review your activity and contact you with any questions. Ensuring that your events are entered ahead of time will also create clarity regarding which activities will count toward your star status for the year.

You will want to make sure you have requested information from your team members (flyers, bulletins, expected volunteers) to accurately enter in the tracking system.

After an Event

Log in to Isidore to complete the “Post-Activity” detail section of your activity. This area will ask for income/expense and donations made that are associated with the activity, as well as attendance and volunteer information. Including this information is the final step in completing an activity.

For activities like Matching Grant and Member Assistance events, this information is necessary to calculate the matched amount provided by Catholic United. Not confirming an activity will result in a delay for depositing funds. Once the post-activity details have been entered, payments will be processed and direct deposited into the team checking account.

Donations

Up to two donations to the list of affiliated organizations listed (available by contacting the Member Engagement Department) can count as an activity. However, **all** donations made by the group should be included in the Isidore activity tracker.

Annual Report

Every year, all Catholic United Parish Volunteer Teams must submit an annual report, which is completed through the Isidore activity tracker. As the Administrative Coordinator, it is your duty to ensure that the information included on the report is accurate and that the information provided online matches your books and ledgers.

The Administrative Coordinator coordinates with the auditor (appointed by the Team Director) to review the information before submitting the annual report to the Member Engagement Department.

Meeting Notes

As Administrative Coordinator, it is your responsibility to keep good notes from the Parish Volunteer Team meetings. This is especially important when there are decisions made on the appointment of team members and amounts/recipients of financial contributions and expenses.

The Team Director will rely on good meeting notes to help track the progress and assignments of Parish Volunteer Team Members. We recommend bringing a laptop to the meeting and emailing the meeting summary immediately following the conclusion of the meeting.

Contact Management

What the Member Engagement Department does for you:

- The Member Engagement Programs Coordinator can provide a current listing of all Parish Team **members' contact information** at your request. You can request to have this sorted and filtered in many ways (age, zip code, etc.). This can either be emailed back to you or printed and mailed via USPS.
- If you wish, we can also **print and send out mailing labels** for the specific list that you want. Request labels by emailing MemberEngagement@CatholicUnitedFinancial.org with your Parish Team Name, City, and State and the parameters desired. Plan on two weeks to receive your labels.

What you can do for your team:

- Communicate regularly with the Volunteer Coordinator to keep an up to date database of volunteer contacts, otherwise known as "Friends of Catholic United". Many will be non-members and therefore not included in any list received from the Member Engagement Department.
- Provide regular updates to your team on the growth of your Parish Team. This is especially helpful for measuring progress on goals set forth at the beginning of the year.
- Communicate regularly with the Publicity Lead to provide contacts for publicizing team events.

PUBLICITY LEAD DESCRIPTION

Summary of Position

The Publicity Lead of the Parish Volunteer Team is responsible for developing all event and team publicity. This includes flyers and posters, bulletin announcements, and local press. You will be managing a Facebook account and developing a Parish Volunteer Team newsletter. You should be proficient using a computer and working with Microsoft Word, Publisher or some other comparable software. Other responsibilities include building relationships with parish and school contacts that are in charge of publicity. You will be in charge of sharing the Catholic United Financial story to a variety of audiences and should be comfortable with public speaking.

Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Develop appropriate publicity materials for events and team activities.
 - This can include posters, flyers, bulletin announcements.
 - Work with the Member Engagement Department to ensure that publicity guidelines are met (up-to-date Catholic United Financial logo use, appropriate language for matching funds, etc.)
- Submit finalized publicity for events and programs to the Administrative Coordinator for submission to the Member Engagement Department.
- Foster relationships with parish and school contacts in charge of publicity.
- Develop a newsletter (print and/or e-mail) for your Parish Volunteer Team.
 - Highlight Upcoming Events/Programs
 - Welcome New Members
 - Showcase successful events.
 - Thank Volunteers, Members, and Friends of Catholic United for their support of team activities.
- Post regularly to the Facebook page.
 - Follow the Social Media Guidelines provided by Catholic United Financial for maintaining a Facebook page for your team (see page 26)
- Take photos of your events and happenings
- Create relationships with local media (newspapers, radio stations, area church bulletins).
 - Encourage them to publicize announcements about your team activities before they happen to encourage community involvement and support of your events.
 - Follow up after your event to share your success and photos of your activities.

Publicity is an opportunity for your team to tell the story of how you help in your parish and your community. Let people know what you are doing and tell people what you’ve done.

Publicity is also more than just the message that you share with your parish community. Publicity, unlike event promotion, happens before, during, *and after* your activities and events.

PUBLICITY LEAD TOOLS

Photography

Photos of your events help tell your story. We love to see pictures of our Parish Volunteer Teams in action and so do your supporters. Share pictures of your team doing good things in your community. If you are having a pancake breakfast show folks serving pancakes. If your team is raising money to help fund a new computer room at your school, take a picture of kids and your team with the computers.

Taking pictures of your events is often an afterthought, so be sure to make a plan. Assign one or two people on your “team” to take photos when you’re working and when you’re socializing. Involve your youth! Teens are often fearless and can make fantastic photographers – hand them a digital camera and ask them to find unique ways to capture an event. You might just be surprised at their creativity and their viewpoint.

Here are a few simple tips to improve the quality and composition of your photos, and to share them with the world.

- Take pictures of people from the front to capture faces, expressions and action.
 - Avoid taking pictures of people from the back. If you have trouble making this happen, ask people to look at the camera before snapping the picture.
- People bring life and context to photos so include a living, breathing person in every photo you take. Even if you only want a picture of the pies in the bake sale, make sure a person is in the shot with those beautiful pies.
- When taking photos in a large room, get close to the people or thing you’re photographing.
 - Most camera flashes only work for short distances, so get up close for better lighting.
- Take lots and lots of pictures. Gone are the days of expensive film and developing, so snap away!
- Try to take two shots of every moment, especially when taking group photos.
- Good photos often come from being at the right place at the right time and the more you take, the more likely you’ll find that moment.
- Reduce blur by stabilizing your camera or yourself. A tripod or monopod works best for this, but there are simple alternatives.
 - Rest your elbows on a table or pew to steady your camera.
 - Before you press the shutter button, exhale.
 - Always hold the camera with two hands.
 - If you have a heavier camera with a lens, like a DSLR, always hold your camera with one hand under the lens.

Catholic United has a photograph release form that may be used for pictures taken at your events. If you would like to make use of this form, Contact the Member Engagement Department for a copy.

Basic Publicity

It is important to share your publicity, flyers, and posters with your greater community. Ask your parish administrator, local businesses, and schools to support your efforts by displaying your posters in their shops, stores or offices.

Bulletins

Bulletins are a great way to get your message out to the entire church community. Information can be shared as a bulletin insert or a bulletin announcement. Bulletin announcements are often short due to the small space available – so be sure to tell people who they can contact or where they can get more information.

Remember to use your bulletin announcements or bulletin stuffers to thank volunteers and donors after your events. Let people know about your success! Be sure to tell them where their donations or efforts helped.

The Member Engagement Department, your Sales Representative, and our Marketing Team have a variety of bulletin inserts that can highlight what your Parish Volunteer Team has done in support of Catholic Religious Education as well as showcase Catholic United Financial stories and products.

Posters and Flyers and Signs

The most common type of publicity used by our Parish Volunteer Teams is the poster or flyer.

For your flyer to be effective, make sure that it has the following:

- The Catholic United Financial logo and name are prominent
- Use the full name of the sponsoring Parish Volunteer Team
- Name the event
- Clearly name the parish school (or religious education program) that will benefit
- Provide the date, time, location and cost
- The fundraiser is open to the community

For some of our programs, like our Matching Grant, we have additional requirements to ensure that the publicity meets program guidelines. We ask that the publicity clearly states that Catholic United Financial is the sole sponsor of Matching Grant programs, and we ask that the event be identified as a “Catholic United Financial Matching Grant Fundraiser”.

Using the Catholic United Logo

It is important that the Catholic United Financial logo is displayed correctly on your publicity materials. We encourage you to use the full banner logo but understand that in some instances space issues may mean the emblem is used alone.

The logo and emblem are available by contacting the Member Engagement Department, at which point you will receive an email with an assortment of logo options for your use.

The logo should be clear and the edges clean, not jagged or blurry. If the logo you currently have appears to have jagged edges or is blurry – please contact us for a new version of the logo.

Advanced Publicity

Newsletters and e-Newsletters

Newsletters are a great way to keep your members up to date with the events and happenings of your Parish Volunteer Team. Newsletters can be as simple as a single sheet of paper highlighting upcoming events and meetings or they can be as detailed as a full color, folded affair.

A newsletter is a great way to:

- Showcase the work that you've done in your community.
- Thank your volunteers and recognize those who have helped with your events and programs
- Encourage participation at upcoming events, meetings, or programs
- Highlight your Catholic United Financial Sales Representative
- Ask your Sales Representative to write a short article
- Include the Sales Representative's photo and contact information
- Include information from the home office of Catholic United Financial as it pertains to your area Parish Volunteer Team.

E-newsletters are a great way to keep in touch with your Parish Volunteer Team members but keep the printing and mailing costs down. The Member Engagement Department can provide a list of members with e-mail addresses on file for you to start building an e-mail list for your e-newsletter. A great way to obtain e-mail addresses is to provide a door prize drawing at your events or meetings where the winner is notified via e-mail.

Local Media Coverage

People like to hear about success. Local media is often looking for new stories. However, sending a flyer isn't going to give them enough information to check out your event.

Develop a media contacts list for your Parish Volunteer Team. Keep track of the names, e-mail addresses, and telephone numbers of the people to share your story. Think bold! It's more than just the person at your parish who publishes the bulletin (although that's a key person for your list).

Press Release

Writing a press release isn't as intimidating as it might sound. If you haven't done it before, now is a great time to think about people you can add to your Publicity Team that can help you with this type of publicity.

- Write a headline, keeping it short and clear. Writing the headline after writing the story can help you decide what it should be.
- Write your story. Think about what you want to say and how you want to say it.
- Include the important facts – event date, time, place, what's the goal, who is impacted by the project. Remember the 5Ws of writing: Who, What, When, Where, Why and How.
- Include information about your Parish Volunteer Team and Catholic United Financial. Write a short description of who you are and what you do.

EVENT LEAD DESCRIPTION

Summary of Position

The Event Lead of the Parish Volunteer Team is responsible for addressing all of the logistical needs of Volunteer Team activities. You are given the flexibility of assigning other Catholic United members, or friends of Catholic United (non-members), specific responsibilities to achieve a successful event. The other members of the Parish Volunteer Team are looking to you to make sure that each event is professional, organized, and runs as smoothly as possible.

Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Work with the rest of the team to assess all logistical needs for each Volunteer Team Event.
 - Volunteer and Publicity Needs
 - Set-up/Clean-up
 - Preparation Timeline
 - Think through all of the details – parking, garbage, delivery of materials, etc.
- Work with vendors on supplying event materials and submit invoices to the Administrative Coordinator. Be sure to make sure vendors are paid on time.
 - Rent (parks, permits, contracts, etc.)
 - Liability Insurance (contact the Member Engagement Department if needed)
 - Catering
 - Decorations
- You or an appointed event team member are the first to arrive and last to leave events:
 - Space should be clean (or cleaner) than when you arrived
 - Lights off, doors locked
 - Troubleshooting during the event
- Event evaluation – record keeping for next year’s events

EVENT LEAD TOOLS

Sample Event Checklist

What to consider before an event:

- Select a Primary Event Organizer from your Event Team as the main contact person.
- Select the event date and room/venue. To avoid potential conflicts, consult the parish calendar.
- Set up a timeline for planning the event, including tasks and persons responsible.
- Prepare schedule for the day of the event:
- Prepare a budget:
 - Identify who will pay for the event
 - Determine break-even amount if applicable
 - Consider and estimate possible costs
- Venue/Location
- Food/Catering: number and type of meals
- Speakers: honoraria/gifts
- Travel and Lodging
- Consider possible income
- Registration fees/stipends
- Work with the Publicity Lead to determine advertising/publicity needs.
- Work with the Volunteer Lead to determine volunteer needs.
- Determine handout needs
 - Name Tags
 - Folders
 - Printed program
 - Pads/pens
 - Gifts
 - Other
- Registration – Events
 - Set registration procedures
 - Set a realistic cancellation date based on the number of registrations received
 - Set up registration database
 - Determine notification process
- Determine technology requirements
 - Sound/microphones
 - Video/audio recording
 - Lighting
 - Computer technology
- Event Logistics - Events
 - Setup – tables and chairs, technology
 - Registration Desk staffing
 - Place cards
 - Speaker Gifts
- Cleanup

Sample Event Planning Timeline

3 Months Out

- Create a committee to help with the planning and participate on the event day
- Design a theme or brand feel for the event
- Nail down exact total budget amount (then deduct 10% to use as actual amount)
- Set the date- Checking all calendars (parish, school, national, special guests, etc.)
- Send out save the date information if applicable
- Secure a location
- Invite and confirm with speakers/hosts if applicable

2 Months Out

- Compile a guest list
- Contact and book food caterers
- Develop a program for event (be sure to schedule breaks between speakers, etc.)
- Establish who/what is the entertainment if applicable
- Develop PR/invitations medium

4 Weeks Out

- Send out/post invitations, making sure all the appropriate information is included
- Develop menu with catering company (be sure to note any special needs, dietary etc.)
- Establish who will capture the event (Coordinate with Publicity Lead)

3 Weeks Out

- Organize promotional/marketing activities (Coordinate with Publicity Lead)
- Establish your events staffing needs (Coordinate with Volunteer Lead)
- Plan for traveling needs of guest (parking, drivers, etc) if applicable
- Establish what AV needs there are (make sure you ask your speaker what they will need)

2 Weeks Out

- Confirm: RSVP's List, Catering/Drink Menu and any additional vendors
- Pay deposits
- Call any guest that have not confirmed their acceptance/decline of invitation

1 Week Out

- Brief Staff and ensure everyone knows what their job will be day of event
- Confirm all arrangements again
- Make sure event (if appropriate) is well advertised (posters, flyers, etc.)
- Pre-pay parking or any charges guests might incur

Day of Event

- Give yourself plenty of time to set-up
- Check all AV inputs and chair arrangement
- Meet caterers and ensure there are the proper accessories (cups, forks, etc.)
- Serve as host

Post Event (within one week)

- Make sure all invoices are turned in and paid by the Administrative Coordinator
- Complete budget chart
- Fill out Post-Event Evaluation (cc those necessary)

Sample Event Evaluation

Name of Event:

Date/Time of Event:

Location of Event:

Description:

1. Did the event fulfill the purpose that was intended?
2. Did the event meet your goals? What went really well? Why or why not?
3. Did the date and time work well? What suggestions would you make for holding this event in the future?
4. Did the location work well? What would have worked better?
5. What parts of the publicity plan worked the best? Was it timely? What would you change for future events?
6. Was the budget accurate? Would you recommend cutting or adding items for the future?
7. Did you utilize outside vendors (food/entertainment/speakers)? Who were they and would you use them again? Why or why not?
8. In what ways did the parish volunteer team work well together? In what ways could you have better included/utilized members? Did everyone follow through with their assigned responsibilities?
9. Additional Comments:

VOLUNTEER LEAD DESCRIPTION

Summary of Position

The Volunteer Lead of the Parish Volunteer Team is responsible for addressing all of the volunteer needs of your team's activities. You are given the flexibility of assigning other Catholic United members, or friends of Catholic United (non-members), specific responsibilities to achieve a successful event. The other members of the Parish Volunteer Team are looking to you to make sure that each event is professional, organized, and runs as smoothly as possible. Other responsibilities include recognizing outstanding volunteers, welcoming new members to your team, and offering referrals to your local sales representative.

Expectations

- Know your mission: "Live our Catholic Faith; Serve our Catholic community; Support Catholic education."
- Work with the rest of the team to assess all volunteer needs for each Volunteer Team Event.
 - Logistical and Publicity Needs
 - Involve/Assign as many people as possible
- Volunteer Recruitment
 - Volunteers working with you should have clear expectations on length of time and responsibilities needed.
 - Manage relationships with key parish/school staff as resources to access volunteers (youth group, school parents, seniors)
- Annually recognize at least one Catholic United (or friend of Catholic United) volunteer for their outstanding service. (see the Catholic United Store for gift ideas: www.catholicunitedstore.com)
- Send thank you notes after each event to those that helped to make it a success.
- Work with the Publicity Lead to communicate what's been achieved at specific events (what's your impact?).
- Welcome new Catholic United members to your team.
 - Via phone call or letter
 - Personally invite them to an event
- Provide referrals (friends of Catholic United) for the local sales representative. This should align with the membership goals set forth by the Team Director.

VOLUNTEER LEAD TOOLS

Volunteer Contact Management

Volunteer acquisition and retention is vital to the health of the parish volunteer team. Being an organized Volunteer Lead will ensure the Catholic United Parish Volunteer Team will continue serving your parish community well into the future.

It's important to remember that volunteers don't necessarily have to be members of Catholic United Financial. Consider the following list of volunteer pools:

- School Families
- Religious Education Families
- Catholic United Parish Team (list provided by the Member Engagement Department)
- Parish Youth Group
- Confirmation Candidates
- MinisTREE participants

Talk to your parish priest, school principal, or director of religious education to obtain a list of names and contact information.

Using your Volunteer Contact List

This list will serve as your main database for staffing parish team events. It is important to be specific in the duties that need to be assigned, that you personally ask for their help, and that you thank them for their contribution. Highly involved volunteers may be candidates for team leadership. Non-members should be forwarded on to the local sales representative as referrals.

Keeping certain demographic data might be helpful to you. Consider keeping a spreadsheet with the following columns: (update on a regular basis)

- Last Name
- First Name
- Address
- City
- State
- Zip
- Email Address
- Cell phone number
- Birth Date
- Level of Involvement (highly involved, sometimes involved, prospective volunteer)
- Primary connection (school family, MinisTREE participant, Parish Team, etc.)
- Membership in Catholic United
- Last event

Volunteer Recognition

Keep track of who is serving and send a hand-written thank you note within a week after each event. This note could also include:

- If there's room in the budget, a small gift card or a trinket from the Catholic United Store.
- Information on accomplished goals at the event (ex. Amount raised, people served, etc.)

Catholic United thank you notes and envelopes are available from the Catholic United Store. A small thank you can go a long way toward getting someone to volunteer again in the future.

Annually, the Parish Volunteer Team should nominate and select one individual from the community to receive a community service award. Then, complete the following steps:

- Arrange an award ceremony to honor the recipient. This may be part of another event or arranged to be presented at Mass.
- Notify the Home Office to receive an official award certificate.
- Coordinate with the Publicity Lead to take photos during the event to include with a news release to local media.

Membership

Welcoming New Members

Some new members of Catholic United Financial may not realize they are assigned to a Parish Team which does so much to support the local parish community. It's important to reach out to this group to inform and invite them to parish volunteer team activities.

Annually, the Member Engagement Department will send a list of new members to your Parish Team. Here are a few suggestions on how to reach out:

- Send a welcome postcard or personal letter containing information about the parish volunteer team and upcoming events.
- Discuss with your local sales representative on which new members might be receptive to a phone call to get involved as a volunteer for an event. Make some phone calls!

50-Year Membership

For many years, Catholic United Financial has recognized 50 years of membership in the Association and encourages Parish Volunteer Teams to do the same locally. Catholic United members with 50 years of membership receive notification from the Home Office and can select a recognition gift.

The Administrative Coordinator will receive a list of 50-year members each year. Consider incorporating recognition of these long-time members at an existing event or plan another fun activity to show this group how much they are appreciated.