How to Launch & Lead a Local Volunteer Movement

A comprehensive guide to connect your people to local volunteer opportunities through building a platform to increase your collective impact.

ServiceReef

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Fellow Local Impact Leaders:

Have you ever wondering what it would take to have a wildly successful local volunteer movement? My guess is that if you're reading this then you're trying to build a strategy to get more people engagement in volunteerism. That's great. But here's the next question… does it feel overwhelming or like there's no actual plan to make that happen? That's been our experienced as well here at ServiceReef, which is why we've created this resources to help you build that path forward to see your local volunteer movement come to go further faster.

Here are some of the problems we're going to solve together in this ebook:
- Where to get started
- How to keep it simple
- How to engage more people
- How to keep people engaged
- How to display all your partner opportunities in one place
- How to present unique opportunities to each person

And here are some of the take aways you'll have from this ebook:
- Your own strategy
- Tools to launch your own movement
- How to see your organization's culture for volunteerism shift
- Stories of how others have gone and done this
- Understanding how the model works and what's happening in the background
- Clear value propositions to instill with your community
- Assessment helping to guide you
- Checklists to make it all happen
- And much more!

This ebook is richly packed with extremely practical and timely resources to help set you up for success. Enjoy diving in and seeing just how this strategy will radically shape your culture and the lives of your members.

Soli Deo Gloria!

ServiceReef Leadership Team

Will Rogers   Micah Pritchard   Drew Davis

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Definitions

Since this strategy applies to so many types of organizations and we're generalizing this strategy, it's important to begin by giving a few definitions.

Aggregated - bringing things together from various sources into one common place.

Fixed Date Opportunity - Single event with a fixed start and end date/time. Ideal for local serving events, international trips, and internships.

Members - these are you people - your audience, your congregation, your students, your employees... anyone who you are leading into this strategy.

Open Enrollment Opportunity - A serving opportunity where participants can apply and then be assigned opportunity dates and fundraising goals.

Opportunity - any type of serving experience from a single hour to a multi-month experience.

Partners - anyone you work with (or partner with) who helps build your list of serving opportunities... whatever you call that relationship.

Repeating Opportunity - A series of repeating events for an ongoing volunteer serving need. Ideal for any regularly occurring volunteer opportunity.

ServiceReef - platform providing volunteer management for local serving to global serving.

What is a Local Engagement Strategy?

So what really are you talking about here?

Local Engagement is when you build a collective listing of serving opportunities from your community partners so that your members can search one list to serve other organizations.

It's essentially a fancy list of serving opportunities that are automatically aggregated from a number of other organizations into one central list. That list becomes the easy place for your members to come and find a serving opportunity without you or them having to manually hunt down various options. It's automated so that the manual work of providing this list is history.

We've seen this strategy emerge more and more as organizations desire to partner together, as we've learned that none of us can do all of it on our own, and as we've seen a stronger desire to lead our members into volunteer matches that make the most sense for them and their skills.

Picture it like this… you're a church of several thousand or you're a high school. For the church, you desire to get your members out serving in the community with any number of your local partners. For the school you require your students to complete a certain number of service hours per month. Your aggregated list allows you a single place to point your members (to one place) where they can find volunteer opportunities (through partner organizations you approve) so that they can serve AND you can keep track of the impact they are having.

This ebook is designed to help you build that strategy for your organization and leverage tools to make it a reality.

Results from this Strategy

So what's all of this going to add up to in the end?! Great question!

We believe there are four primary results that will come from you leading this strategy in your organization. Let's quickly unpack them.

#1 Change Your Culture - leading a Local Engagement strategy in your organization opens the door to shift your culture so that your members are leveraging well their skills to serve their local community. Their serving may not be directly with your organization but you are the one leading them to serve and use their skills. And by leading more people to serve you are building a stronger culture of volunteerism.

#2 People Mobilized - Part of that culture shift is people engaging which is the straight forward benefit of people being mobilized. Mobilization has its challenges and this strategy helps unpack tips and tricks to overcome many of those.

#3 Personalized Matches - A major challenge in mobilizing people is helping to connect each individual with things that interest them... where they can see their gifts and talents being used. This strategy first helps you build a plan to catalog your opportunities based on various interests and then it helps you have the volume to present to your audience.

#4 Centralized Search - the brass tacks problem many of us have had in bringing this to life has been the means to create that centralized search capability with the ability to match to person interests. This strategy will help you build the plan to create that centralized search tool that automates the vast majority of the work.

There are many more benefits and results you will experience from leveraging this strategy, but there are the core ones we wish to focus on through this ebook and this strategy.

Story: Southeast | Unleashed

One of our long lasting partners, Southeast Christian Church, began spinning out a vision months ago to hyper launch into local engagement and mobilizing their 30,000 person congregation into local engagement. The goal was to make this an ongoing part of the church culture. And so began their journey to Unleash the full force of the church... with the simple title of Unleashed.

To mobilize this many people required a few key ingredients. First, it required a large amount of serving opportunities. Southeast rallied together 50+ local organizations to post their trips to an aggregated list. Second, it required a dedicated mobile app to host this aggregated list of opportunities. Third, it took a huge initiative from the entire church to host a big launch.

In March, Southeast launched the entire Unleashed initiative with over 500 serving opportunities aggregated from 50+ organizations with their dedicated mobile app (iOS and Android) for people to download and a half day virtual event to promote and educate the church about opportunities and organizations.

ServiceReef was honored to be part of this project to build the aggregation tools and the mobile app for Southeast. It's been a great journey seeing how so many have signed up and are engaging in serving locally through this Herculean effort by Southeast. This story is a great example of keeping momentum moving even during this pandemic and giving people a strong means of engagement.
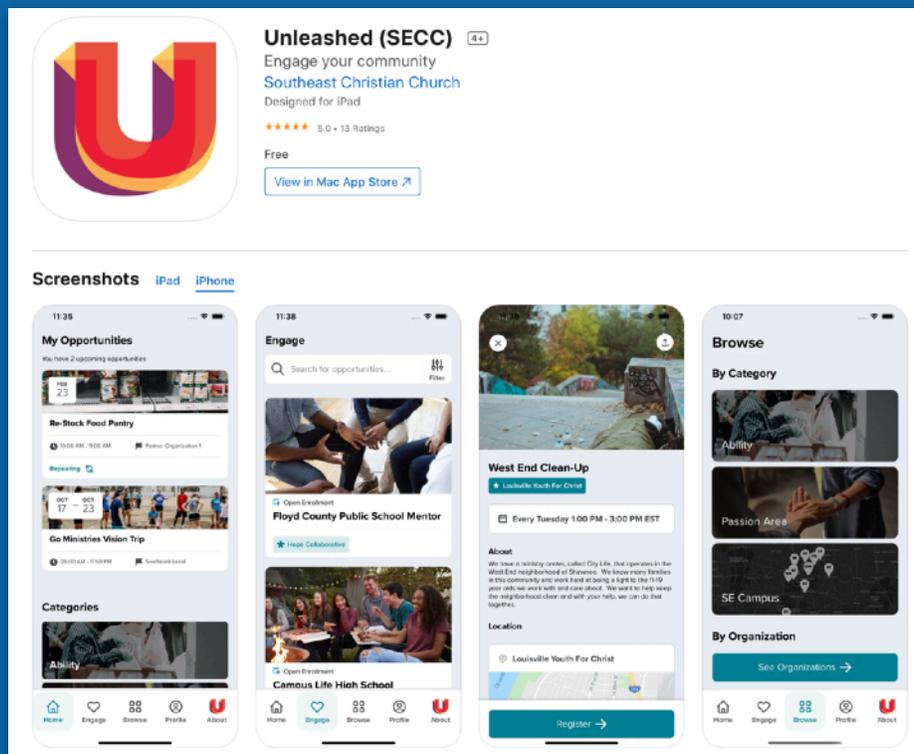
Part 1:

Building a Strategy Plan

Introduction to a Local Engagement Strategy

We've already given some definition and clarity to what local engagement is and it's results but let's take a little more time to unpack the concept, casting its vision, and building a value proposition.

The Concept
The concept is simple... you have members in your audience who you want to connect to serving opportunities. You want that process to be simple and you would love for that to be as automated as possible. You would also like to keep track on their involvement and impact.

The Process
Alright, so no false promises here... this strategy takes work! The impact is huge but there's also a good deal of work to make it happen.

Our goal is to make the process to get there simple:
   • **Build** your Platform – design your structure, strategy, and process
   • **Launch** your Movement – kickoff your plan and infuse your new culture
   • **Connect** your People – guide your members to matched opportunities

Our commitment to you through this ebook is to give you the tools you need to bring this plan to life, to do a lot of the heavy lifting for you (since we've already done this with others before), and to share tips/tricks to help you accelerate your success.

Who is this for?
ANY organization that is trying to connect their members to partner serving opportunities.

Just to name a few:
   • **Churches** - churches looking to offer more serving opportunities and bring together local partners to engage their congregation.
   • **Middle/High Schools** - schools working to instill a volunteer mindset in students and needing to display opportunities from local partners in a single place.
   • **Universities** - universities working to engage their student populate in local serving.
   • **Businesses** - businesses with a corporate mindset for volunteerism and wanting to create tools to connect their employees to opportunities.
   • **Municipalities** - city groups desiring to build a city-wide strategy and structure for anyone to find an opportunity that matches their interest.
   • **Non Profits & Conferences** - non-profit groups focused on volunteerism who also partner with a number of local organizations.

How does it work?

In some ways it's really simple and in other ways it's really complex. The diagram below captures the basic model of what's happening in an aggregated serving strategy. You have multiple organizations posting opportunities into a central database/list. You are the "owner" of that list and you share that with your members. The system backend does all the work to aggregate. Your role is to promote the initiative.

- For the member it's **simple** because they have one central place to look for opportunities and sign up.
- For the host organization (you) it's **simple** because it's all automated once its initially setup.
- For the partner organizations it's **simple** because they have the tools they need to manage volunteerism and it automatically aggregates to the shared list.
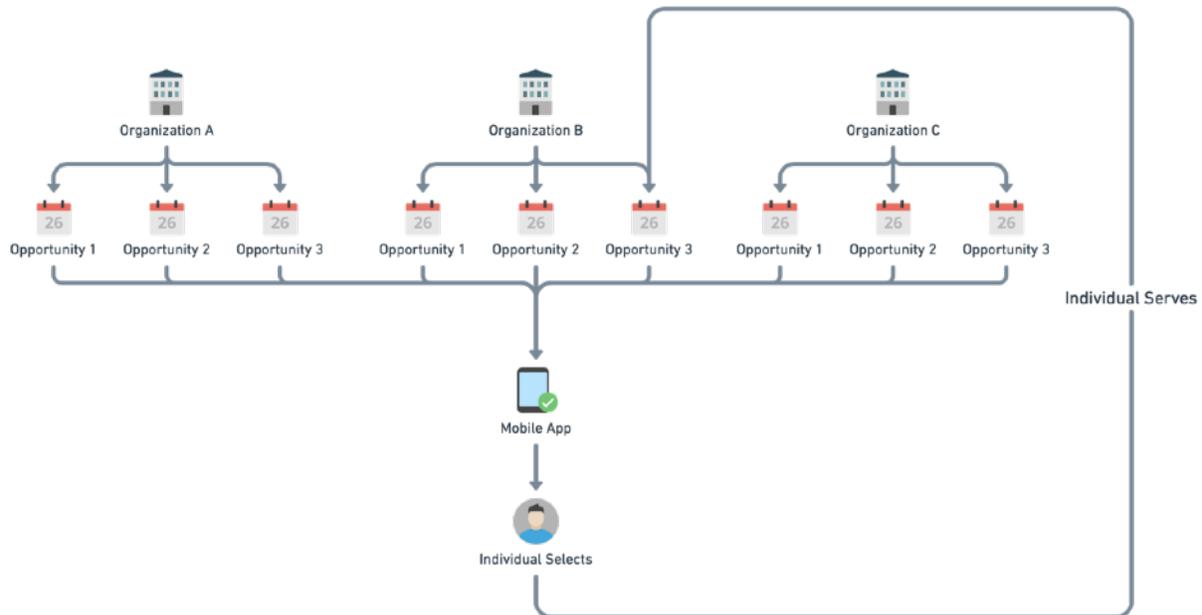
Importance of Ownership

One foundation we strongly believe at ServiceReef is the need to promote you more and ServiceReef less. That might sound strange but our goal is for your members to never even know who we are. That's why you can brand your own subdomain on ServiceReef but also why this mobile app can be completely branded for your organization. Why is that important? Because you are who they trust and who they know. That's why we shy away from using "the ServiceReef app". Why confuse your members and try to "sell" them on something else. Why not make this something that is yours? That's one of our goals in how we've created this tool.

Value Proposition

What's your value proposition? We believe that knowing the value you bring to your team is essential and helps bring clarity. So let's quickly unpack a few value propositions you'll experience with an aggregated serving strategy.

- Your **Members**
    - Encouragement to serve
    - Means to find opportunities that match personal interests and skills
    - Searchable list in their pocket (mobile app)
- Your **Partners**
    - Toolset to manage all of their serving opportunities
    - Access to a much larger group of potential volunteers
    - Part of a larger movement
- Your **Organization**
    - Automated workflow so you don't have to manually create lists
    - Reporting on partner and member engagement
    - Custom branded mobile app to promote
- Your **Local Community**
    - More people engaged and serving
    - Spider network of people serving where they may never have been exposed to before

Frequently Asked Questions

There are always more questions to answer! This ebook will help unpack many questions you might have about this strategy so stick with it… there's a lot of useful information in here. But still, we know there are a number of questions you might be asking so let's unpack a few.

- **Is this part of a church's missions department?** Well, it could be but we most often see this as part of the entire church culture or strategy. Many times the missions department will be the "owner" of the plan but will actively engage other departments in the church sense volunteerism is more than mission trips or local partners - it's also internal serving .
- **How do you get leadership on board?** We should write an entire ebook just on that! Truth is, that's difficult. Our suggestion is that you bring leadership stories and examples of how this has worked for others (some here in this ebook), communicate you have a clear plan (leveraging this ebook), and show the greater impact your organization could have. Keep with it and be persistent. This is a good thing to advocate for and will make a huge difference in the culture of your organization.

Guiding Philosophies

Here at ServiceReef, we believe everything starts with the foundation of WHY… or perhaps also known as your guiding philosophies. Philosophies drive 100% of our technology development which is a bit strange. Most technology companies focus first on functionality. That might work in many places but it doesn't work well in this space. Our "end game" actually isn't technology - it's seeing more people mobilized into missional living. So we start with guiding philosophies that then materialize into how we design and build our technology. So let's dive into a few for this strategy. And hey… please feel free to steal any of these and use them for your organization! After all, we're all in this together.

Creating a Culture
We believe that a local engagement strategy in any organization will shift the culture and help create a fuller culture of volunteer engagement. Functionally, we're working to get people to sign up for volunteer opportunities but bigger picture… we're looking for life change, habit change, and a culture shift.

Everyone has a Calling
We believe everyone has a unique calling (and unique gifting). It's easy to fall into a mentality of "well, someone else is going to do it" or "someone else is called to do that" but the truth is, we are all called to serve our neighbor and engage the world around us (and we don't believe barking at each other on social media qualifies for serving the world around us!). Every single person has unique skills and is called to serve in some way.

People Need a Guide & a Plan
We all need a guide to show us the way at various stages of our lives. How many of us have had mentors and other key influencers in our lives. That's your role right now in this strategy… to guide people into serving. The simplest way to be a guide is to create a clear plan for your members to engage and teaching them how to engage their unique skills. We're going to help you build that plan here so you can be a better guide.

It Takes a Catalyst Leader
So buckle up… if you are reading this ebook then you already have an itch to be that catalyst leader. We've learned that one massive piece of this puzzle is having someone (or some organization) take the lead to build a local engagement model. These things don't just happen. That's why we believe this is a foundational philosophy to a movement like this… it's takes someone like you to lead the charge and make it happen. Good news… we're here with you every step of the way.

Building Your Strategy Plan

Before we dive into the actual tactics of this strategy, let's spend a moment talking about what you need to be doing to build your strategy plan. In some ways this is project management 101, but let's take the time to map out some key action items and resources that will help set you up for better success. And trust us, we've done this a lot and learned some of the most essential building blocks for success.

Define your WIN
We love the language of "the WIN". It forces us to define what success looks like. You should do the same. Take the time to define what success looks like for your organization, for your partners, for your members, and for the local community. These will likely be closely aligned to your value propositions. Just make certain you've defined what success looks like so you can properly measure as things pick up steam.

Define the Owner/Decider
Early on in the process you need to decide who the owner of this project is going to be. You need someone who calls the shots, makes the hard decisions, and is ultimately responsible. It's going to take a team to make it happen but teams are difficult to hold accountable to things.

Culture vs. Initiative
We've already shared that our goal at ServiceReef is to see this become a culture shift for your organization. But before we go too far down that path, you need to decide if you're looking to shift your culture or if this might just be an initiative. Either is fine. Our hope is that it creates a culture for you but sometimes the reality is your audience is seasonal or an initiative is all you have bandwidth for - no worries! You just need to determine which goal is set before you.

Build a Team
You're going to need a team to help make this happen. Sure, some highly skilled people could do most of this on their own, but why miss out on bringing more people into the mix so there's more ownership and buy-in? These team members can be paid staff or very often, they could be volunteers. Let's talk about some skills you will want to engage in your team.
- **Strategy** - the ability to build your overall plan and keep things on track
- **Project Management** - the ability to manage the tasks and team
- **Marketing** - the ability to build a marketing plan, collateral, and promotions
- **Content Writers** - the ability to communicate about this vision and idea
- **Story Tellers** - the ability to capture stories of impact and share those stories

- **Videographers** - the ability to capture video and video presentation
- **Trainers** - the ability to train your teams and partners on the strategy and technology

Building a Timeline

Yes, there's still a lot to unpack in this ebook before you might even know for sure if this is right for you and your organization, but even still, let's talk about a healthy timeline for launching this type of an initiative. Timelines help us set healthy expectations and better achieve our goals.

PREPARE 3-6 Months	LAUNCH 1 Week - 1 Month	SUSTAIN Ongoing
✓Decision to Go ✓Building a Team ✓Creating ServiceReef Account ✓Building Mobile App ✓Onboarding Pastors ✓Marketing Strategy ✓Launch Event Plan ✓Create Collateral	✓Campaigns ✓Launch Events	✓Continued Marketing ✓Cultural Infusion ✓New Member Onboarding ✓New Partner Onboarding ✓Other Launch Events ✓Continued Partner Encouragement ✓Continued Advocacy

Your Launch Date
When would you like to go live with your aggregated serving strategy?

Assessment: Is this for you?

We've already thrown a lot at you. That's on purpose actually. This ebook isn't written as some promotional piece… it's designed to be your resource to create your plan. So yes, this is going to be immersive in details and plans. But before we go a whole lot further, perhaps we should take a quick litmus test to see how you're doing and how this concept might align with you and your organization. So let's do a quick self-assessment.

QUESTION	SCORE 1=LOW / 5=HIGH
1. Do you feel **called to lead** and instill a vision like this in your organization?	
2. Does your **community need** a strategy like this to get better engaged?	
3. Are your **members asking** you for where and how they can serve?	
4. Are your **partners open** to being part of a larger movement and receiving new volunteers?	
5. Is your **team willing** to do the work to launch a strategy like this?	
6. Do you get **personally excited** for what this could mean and do for your organization?	
7. Have you **dreamed** of doing something like this for a while now?	
8. Do you feel a **leadership tug** to lean into a strategy like this and make it happen?	
MY TOTAL	

Great work… so how did you score? If you're over 30 then you most certainly need to keep plowing forward. If you're over 20 then take some time to think and pray through if this is right for you. Our guess is that it is, but take some time to process. No joke… there's a lot of work ahead so you really do need to be convinced this is right for you. We're pumped to be partnering with you to bring all of this to life!

Story: The Global Missions Health Conference

The Global Missions Health Conference (GMHC) is another long term strategy partner of ServiceReef. The GMHC is a 25 year running conference for healthcare professionals engaging in healthcare missions around the world. It's actually the largest event of its kind and draws an amazing audience in November for their annual event.

The GMHC hosts an annual event with over 150 exhibiting organizations and an online platform with over 800 organizations. Many of these organizations host short term trips domestically and internationally. The GMHC leadership team wanted to create a means of aggregating opportunities from these organizations and provide a single hub of opportunity to offer this audience. That initially led to the creation of an aggregated list of opportunities on the ServiceReef platform several years ago with our aggregation/partnership tools and it's currently the drive behind creating a custom mobile app for this community to mobilize more people into healthcare missions. We're excited to see how this continues to propel this community of hundreds of thousands of healthcare professionals forward into missional living.
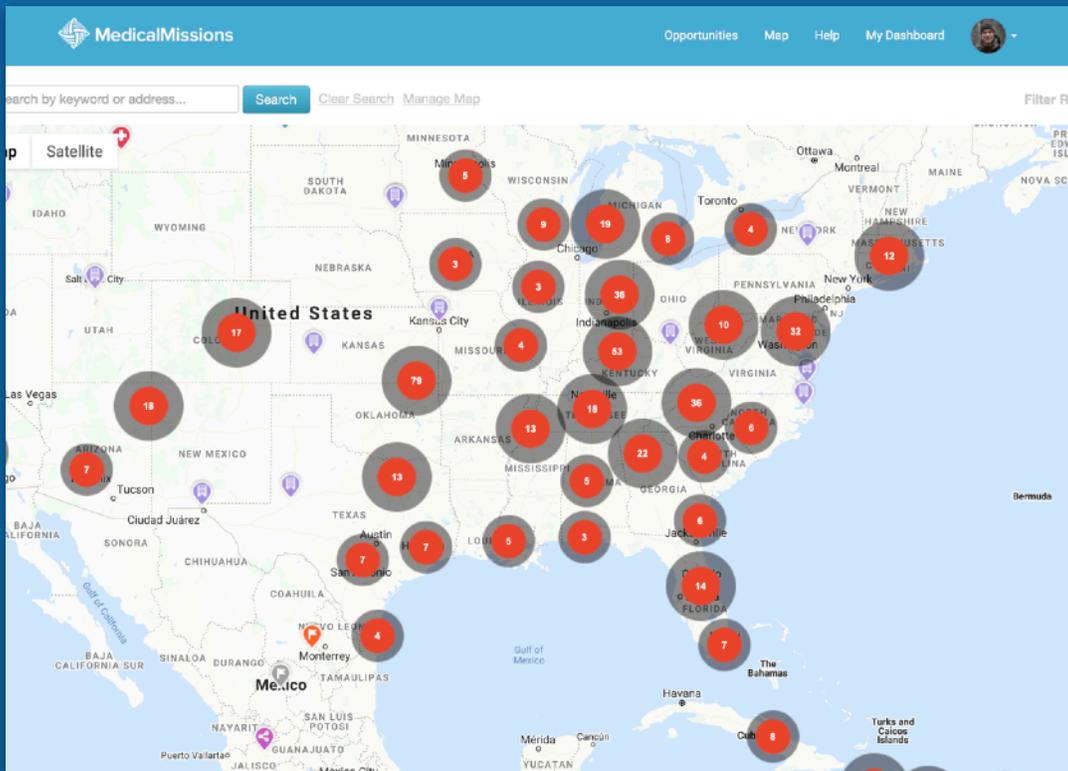
Part 2:

Building a Setup Plan

Setup Plan Checklist

One great place to start with building a plan is having a checklist of what's ahead. Use this page to map out the tasks ahead, who is responsible, when completed, and any notes. There are extra spaces here for you to add other tasks as needed. The key goal here is simply knowing what all needs to be done to have things set up correctly... we've got you!

Task Item	Owner	Completed	Notes
Identify your Team			
Map out Expectations			
Create ServiceReef Account			
Brand your Site			
Build Categories			
Connect with Stripe or PushPay			
Partner Trainings			
Partner Onboarding			
Create Beta Testing Group			
Build a Launch Timeline			

Plan Ingredients

As you build your plan, think of it like making a wonderful meal. Right not we're just collecting ingredients for that meal so that you can create your own masterpiece. In this section, we're going to unpack a number of things you should be considering and mapping out with your team.

Mapping a User Experience
A user experience pathway is just what it sounds like… it's the steps and stages someone would go through as they engage with this initiative. There are many ways you can design this but what you need to do is have a clear understanding of the process they are going to walk through. This helps you guide others, explain things, and have a better grasp yourself. Below is a sample of what a user experience might look like for you.

Introduced to the Vision → Download & Sign Into Mobile App → Search for an Opportunity → Signup → Serve → Continue Serving

Timeline to Launch
We've already discussed a general timeline in the previous section and on the page prior we mapped out a number of key tasks. You will want to take time to map out a timeline for your launch. Here are a few tips:

- **Workback Schedules** – a Workback Schedule is basically a timeline with the launch date as the anchor and then you "work back" the tasks before that launch date to get you to that launch date.
- **Trello Board** – consider building a Trello board or some other project management shared task board to keep track of everything. Two tips: keep each tasks a separate card and set your stages or columns for each week leading up to the launch.
- **Build with your Team** – don't try and build your timeline on your own. It's best if you can get all those who are impacted/effected by the strategy into one room and create a plan together.

Setting Expectations

We focus on this a lot here at ServiceReef and believe things always work out better when you can set some clear expectations. But don't just set expectations, share them! We're going to unpack a few that you might have here but use this as a launch pad for setting and clarifying your own expectations.

Expectations of You (the host)	Expectations of Your Members	Expectations of Your Partners
Lead the project	Engage with the project/app	Participate in project
Setup ServiceReef	Signup and serve	Load serving opportunities
Guide people in the process	Share their stories	Be an enthusiastic advocate
Train and equip members and partners	Invite friends and family	Share with others

Initial Vision Casting

There's a lot of work in vision casting but you need to be thinking now how you plan to engage people in this vision. We recommend you start early and let people know something is coming. Also remember that you need to cast vision internally in your organization, to your members, and to your partners. That's imperative to cast vision to all three parties.

Building Serving Categories

Alright, so what's a serving category? These are how you organize your serving opportunities. You can have endless categories but that's not really helpful for your members. In the ServiceReef tool you can custom create your categories for your network. This will do two primary things: first, it's how your members will search for opportunities and second it's how your partner organizations will tag their opportunities. Here are some of the most common tag categories we see:

- **Passion Areas** - what people get excited about and feel "called to"
- **Personal Ability** - where people have skills and talents
- **Geography** - where people want to serve
- **Groups** - internal organization groups like Student Ministries or Campus
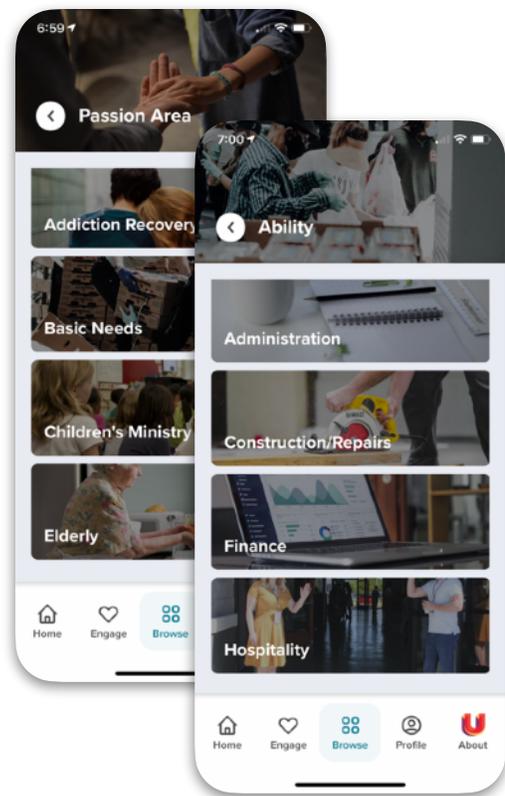
Examples of Categories

Branding

It's important to brand your instance of ServiceReef. We want people to know you (not us). Branding helps people feel like they are in their own environment. That relieves confusion and gets people more quickly to our goal of engaging in a volunteer opportunity. Here are a few things to consider as you setup your ServiceReef branding.

- **Colors** – load your color values into your ServiceReef profile.
- **Logo** – load your logo into your ServiceReef profile – note that there are a few types of logos to load for the various places your logo is displayed.
- **Banner Image** – load your banner image into your ServiceReef profile – the key photo at the top of your profile.
- **About Tab** – create your About page (on your own web platform) that explains about your project and whatever else you want to communicate.
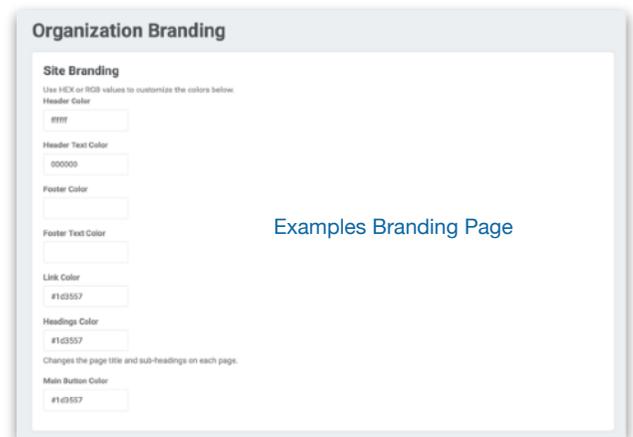
Beta Testing

Consider assembling a beta testing group to help you iron our anything in your communication, training, or process before your big launch. This is another group you'll want to set some clear expectations for them to dig deep and give you feedback for what could be improved. An ideal size for a beta testing group is around 10-12.

Giving it a Name

Internally, here at ServiceReef, we call this the Local Engagement Tool and in this document we call this your local engagement strategy. Well, that's all good and fine for more technical or internal talk but we suggest you give your initiative a name and a brand. We've found it best when you have a short name that captures your goal plus a short name sure fits a lot better on the iPhone when you're looking at app names.

PS – even though we call this "local", it's not limited to local. This could very well apply to aggregating global opportunities.

Partner Onboarding

Quick reminder... partners are anyone in your network who are being invited to post volunteer opportunities into your shared network. You might call them something different, but for simplicity, we refer to them as partners.

Below is a diagram worth spending a moment to study. This model helps show the overall flow while also breaking this down for the three core groups. Each group only really needs to know their line of flow but it's good for you to know the overall flow. This is also important as we unpack how to engage and onboard partners.
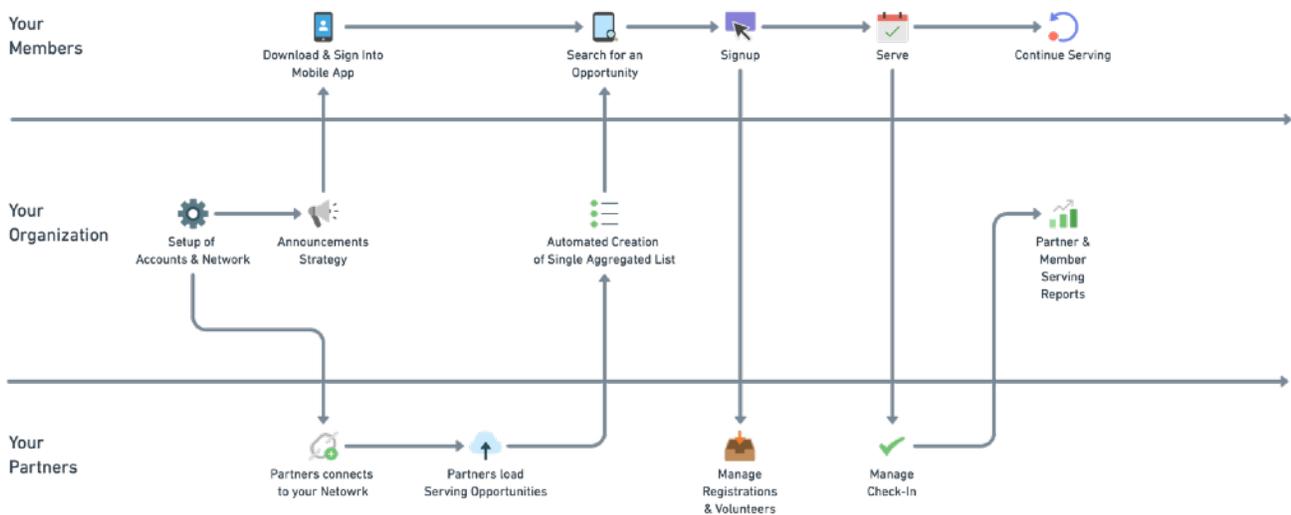
The Process
Since you are serving as the guide, we're going to outline the process to engage and onboard partners. You can modify as needed but this outline will help you more easily engage your partners. It's like a roadmap and it's worth sharing with them.

> **Step 1 : Cast the Vision**
> Before they do anything on the technology, they need to be brought into the vision. Be certain that you've casted the vision and they are fully aware of what they are getting into... and what an impact this is going to make on them.

> **Step 2: Create an Account**
> Each of your partner organizations will need to create a ServiceReef account. You will set this up with ServiceReef and be given a specific sign up URL that will automatically assign them to you as your partner.

Each partner organization will have their own ServiceReef account which means they can manage their opportunities and volunteers as needed. So not only are you helping them intake more volunteers from your organization, you are also helping equip them with a better toolset to do their everyday job.

Step 3: Training
The best model we've seen is when the host organization (you) will provide physical or virtual training to walk your partners through (1) creating an account, (2) setting up their organization profile, (3) posting an opportunity, and (4) managing volunteers.
TIP: ServiceReef has a slide deck and videos available upon request for you to use to run this training.

Step 4: Posting Opportunities
Then starts the race of posting opportunities. We recommend you give partners around 30 days to post opportunities before your big launch. That's enough time to do the work but not too long where they forget. Stay on top of them to be doing their work.

Step 5: Kick Off
Invite them in to your kickoff event if possible and make them part of the overall process, strategy, and launch.

The Invitation
You are introducing something new to many, if not all, of your partner organizations. Here are a few things to think about as you make this invitation.
- **Clarify** - over communicate and clarify what this is and how it works.
- **Questions** - invite your partners to ask questions.
- **Expectations** - set and clarify clear expectations of them and what they can expect from you.
- **Timeline** - give them a clear timeline for the major milestones of the project.
- **Trainings** - explain that you will be providing trainings throughout the process
- **Value Proposition** - explain all the value they will be receiving: more volunteers, more awareness, management tools, reporting tools, etc.

Part 3:

Building a Launch Plan

ServiceReef

Launch Plan Checklist

Yes, we do like checklists here at ServiceReef. But we like them because they help us be efficient and achieve the goals we've set out to run after. That's our hope for you as well. This checklist is designed to help you launch your aggregated strategy well.

Task Item	Owner	Completed	Notes
Build a Marketing Plan			
Design a Kick Off Event			
Send Kickoff Event Invitations			
Create Collateral			
Other:			
Other:			
Other:			
Other:			
Other:			

Launch Plan Resources

So… here's a fun one… your launch plan. There are SO MANY ways you could go about creating a launch plan to release and reveal your new strategy. Let's spend some time talking through some ways you might do this. In the end, we just want to encourage you to do something that helps give this initiative a special kickoff that helps set you, your vision, your members, and your partners up for the greatest success.

Creating a Checklist
On the previous page we provided a checklist of a few known things for you to consider. But only you really know all that needs to get done to host your launch plan. Much of this checklist depends on what you are going to do for your launch so be sure to be keeping some type of a list.

Launch Event
We strongly encourage you consider some type of a launch event (physical or virtual). This helps build momentum, gives you a goal for launch, and creates excitement. Here are a few ideas for how you might host your lunch event.
- **Cast the Vision** – take time again to cast the vision for what you are doing and how people can get involved.
- **Make it Short** – you might have a lot to communicate, but be brief in what you put together so it does't demand a lot of time from people.
- **Celebrate the Success** – start now by painting a picture of success and celebrating that success… like how it will impact people and your community.
- **Include Partners** – find ways to include your partners in the event by allowing them to share about their organizations and opportunities.
- **Guide people** – be the coach people need to help instruct them, encourage them, and push them to sign up (and how to make that happen).
- **Record the event** – everyone might not be able to attend to be sure to record things so others can engage later.

Marketing
Let's talk about getting the word out about your initiative. We're going to call this marketing… you call it what you please. The goal is the same… getting the word out! We've found that there is no silver bullet but it sure helps to have a number of things in play to promote the initiative and your launch. Here are some ideas:

- **Brochure** - in a world where everything is digital, sometimes its just nice to get something in print. Consider creating a brochure about your initiative and launch.
- **Teasers** - create video teasers about what's to come to build anticipation and start calling people into action.
- **Emails** - begin emailing your members to give them a sneak peak of what's to come and invite them to your launch event.
- **Website Notation** - make sure to note on your website about the launch event and then for your mobile app.

Your Ideas

Story: Urbana18

We worked with another large event to bring together an aggregated approach to their exhibitor serving opportunities. Similar to the Global Missions Health Conference, this event was bringing together short term trips. Urbana is a large (10,000+ attendees) missions event for university students and brings together tons of amazing people looking to serve around the world. In this project, we worked to bring together an aggregated list of over 500 short term opportunities that student could search through and find which ones matched their personal interests.

Part 4:

Building a Sustainability Plan

ServiceReef

Creating a Culture of Volunteerism

I think we all agree that one major goal of this strategy is that our organizations have a stronger and healthier culture of volunteerism and that it becomes a way of life for our members. Those are good goals! But those goals take effort to achieve.

The Starting Line
The best way to think about your launch event is to call it your starting line. It's actually where everything begins. It's not the work that go you there... it's actually that launch event. Just own it! That's okay... we just now need to build our plan to make this a sustainable part of who we are. Good news... we've got a plan!

The First 90 Days
We've found that the first 90 days post launch event are the most critical to continue "beating the drum" and advocating for this part of your ethos. You've already built plans for getting you to the launch event so it's no difficult task to build a plan for this as well. Great thing is not, you've got all kinds of great stories and resources at your disposal. Here are a few suggestions for what you might communicate in those first 90 days:
- **Tips & Tricks** - educate them on how to efficiently search, find, signup, engage, etc.
- **Unique Opportunities** - highlight various ways to serve that might not be as common for people to know about
- **Stories** - share stories about how others are engaging and the impact on your partners
- **Various Ways to Serve** - highlight your categories to let people know about how they could be serving
- **Vision of Project** - come back to your vision over and over again
- **Stats & Numbers** - highlight key numbers like how many opportunities, how many signups, how many stories, etc.

Create a Calendar
Before your launch (yes, before the launch), sit down with your team and build a 90-day calendar for how you will continue to communicate and push your new strategy in your organization.

Triggers for Engagement
Think of each additional engagement link a trigger that's going to get people to take an action. Here are some ideas:
- **Email Series** - Create a drip email series for people in your audience (regardless if they have signed up to serve or not)

- **Social Posts**- Schedule a series of social posts with links to you app
- **Continual Sermon Reference**– Come back to the vision and this call to action often in your sermon series (for churches obviously).
- **Website Notation** - Set some notation on your website with a banner image or some means to publicize.
- **Webinars**- Host webinars to share more about the initiative and how people can engage.
- **Stories**- Share stories from people serving or from your partners.
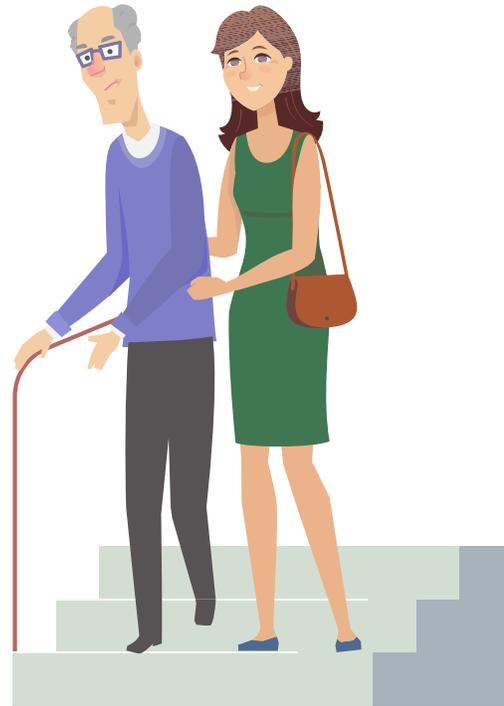
Your Ideas

Part 5:

Building a Tech Plan

ServiceReef

Creating a Technical Plan

We're going to wrap things up here in this ebook with a deeper dive into the technical side of deploying a strategy like this. Why? Because the engine that powers all of this is complex. We believe the better you understand, at a basic level, what's happening then the better you are equipped to succeed in running this. Hey, we're huge fans of the When Helping Hurts model here at ServiceReef and do all we can to set you up for success and ownership. So let's get started.

How does it work?
The two diagram below (used elsewhere in this resource) best describe how this works. ServiceReef simply is the engine that makes it all work in the background.
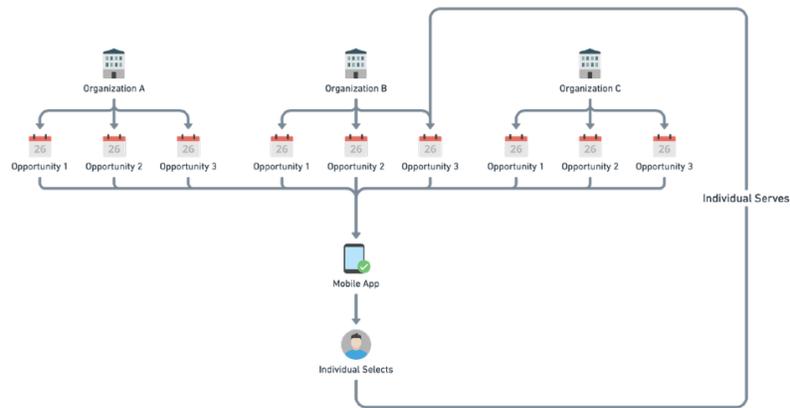
DIAGRAM 1 | OPPORTUNITY FLOW: This diagram displays how organizations post into a shared single database for people to search.
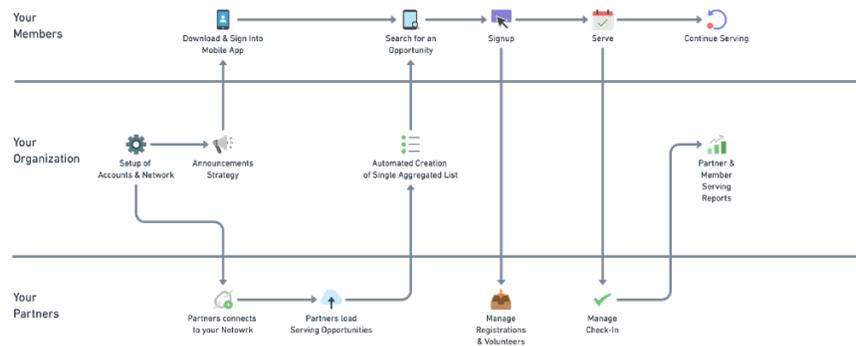

DIAGRAM 2 | FULL FLOW: This digram display how the entire flow works in concert between volunteers, you (the host), and your partners.

How does it look?

Excellent question! Did you know that purchasing software has a certain level of anxiety that comes with it? It's true... you're taking a leap into something new and something else you have to learn. With that in mind, our desire is that you have a really clear picture of what you're getting from ServiceReef. So let's spend a moment taking a look at several examples for how this looks and feels. We get it, this is as important as it's function!
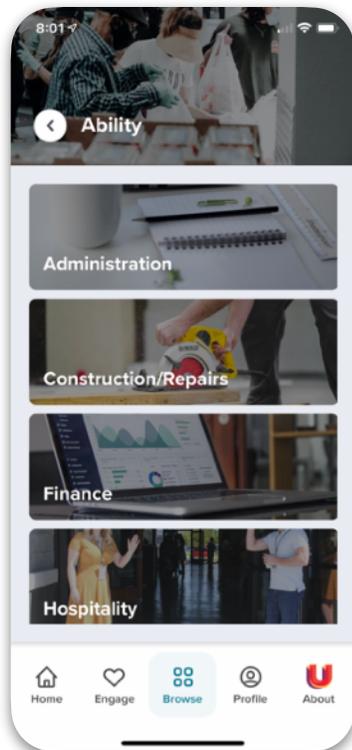
Search Page

Display your core categories (and images) for your collective volunteer events.
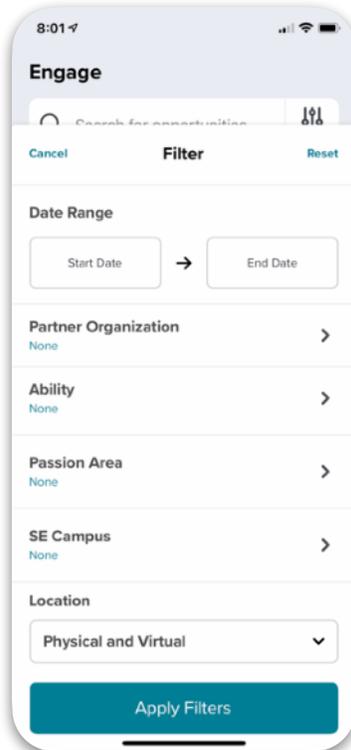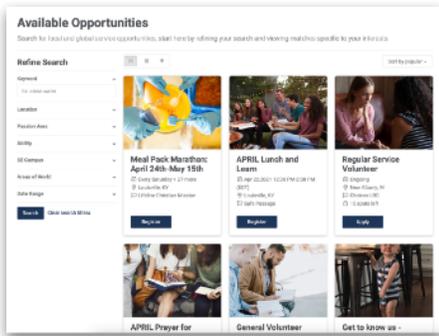
Filters

Use your custom filters along with date, location, and other tools to refine down your interest.
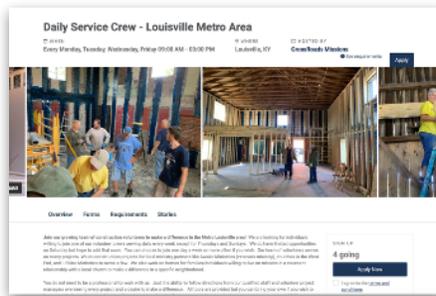
Opportunity Page

Dedicated pages per event with images, videos, descriptions, maps, contact info, and more.
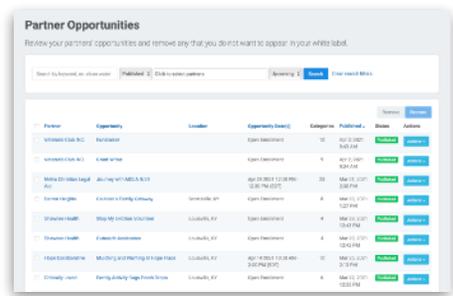
NOTE: Images above are examples, each instance and customized mobile app look unique to the organization's brand and reflect other configured components.
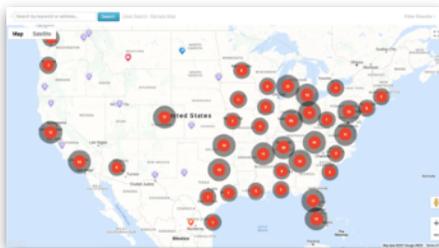
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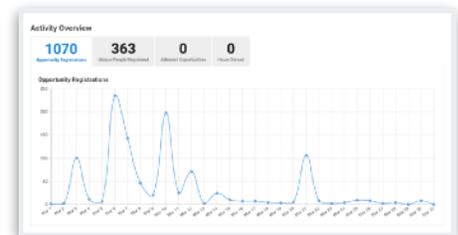

Opportunity Management
Manage all of your partners opportunities in one place and remove any if necessary.

Opportunity Map
View all opportunities on a collective map - embed the map on your website.

Reports
View trends of which partner organizations are having the highest engagement.

Trends
View trends to learn when people are signing up for opportunities.

NOTE: Images above are examples, each instance and customized mobile app look unique to the organization's brand and reflect other configured components.

Training Your Partners

Yes, a strategy like this does take a lot of work. We've created a deck for you to use in your training of your partners to walk them through each and every step of the process and to give you the tools to set everyone up for success. This training walks through some of the following items. This slide deck is provided to our clients as you get started.

- **Overview** - Providing an overview of the project, its vision, how everyone is part of it, history, and anything else that helps give people context.
- **The Process** - Mapping out the process for how the systems works (what's going on in the background) and the process for getting started.
- **Creating an Account** - Step by step walk through on how to create an account for each partner organization.
- **Posting an Opportunity** - Step by step guide on setting up their first opportunity and navigating to the various tools and language of ServiceReef.
- **Managing an Opportunity** - Step by step guide for managing an opportunity plus a review of the management tools.
- **Wrapping Up** - Wrapping up your training and any last key points you need to share with people like what information is shared, support, and key contacts with your organization.

Additionally, we have a video recording of us leading this training that you can share with your partners if you would like. Of course the language is generic, but it's another resource to help propel things forward.

Core Features List

Alright, so you might be asking more questions now about what tools and features are actually available in ServiceReef. Let's take a moment to run deeper into the specific tools available to you, your partners, and your members.

MEMBER TOOLS
- **Mobile App** - Self branded (by you) mobile app for your members to download and find opportunities.
- **Personal Profile** - Personalized profile to manage their upcoming opportunities and other things in their personal profile.
- **Family Accounts** - Members can connect their personal account to others in their family, especially their kids, to better manage everyone in one place.

PARTNER TOOLS
- **Organization Profile** - Individual organization profile to self-manage their own opportunities has it's own branding and subdomain.
- **Management Tools** - Full suite of management tools for running their volunteer events (applications, fundraising, emails, calendars, task management, and more).
- **Communication Tools** - Fully integrated email sender to communicate with their entire member database or specific opportunity teams.
- **CRM** - simple database management of volunteers and member engagement tracking.

AGGREGATOR TOOLS (You... you are the aggregator)
- **Mobile App** - Self branded mobile app for your organization to build and brand and stand up for Apple and Android stores.
- **Reporting** - Report on member and partner engagement with various reporting tools and analytic integrations.
- **Branding** - Configure your site to match your brand colors, logos, images, and messaging.
- **Categories** - Configure your unique categories to better organize your opportunities and have your partners post into our category framework.
- **Removal** - Management tools like the ability to remove specific partner opportunities for various reasons.

Closing Self Assessment

We've been through a lot here together in this ebook. Our goal has been to present an extremely realistic approach, plan, and strategy for what an aggregated serving strategy looks like because we want you to succeed. As we're wrapping up, let's take a moment to re-assess if this is a good fit for you? A little secret… if you're still reading this then we've got a pretty good idea the answer is yes!

CATEGORY	SCORE 1=LOW / 5=HIGH
Vision - Do you have a vision for this? Is this part of the culture you want to create?	
Need - Do you see a need for this? Are people asking for ways they can serve?	
Opportunity - Do you the opportunity for this in your community and with your partners?	
Team - Do you have team to make this happen? Is your staff excited about this?	
Relationships - Do you have the relationships with partners to pull this off?	
Bandwidth - Do you have bandwidth for this? Can you create the bandwidth?	
Budget - Do you have budget set aside for this? Could you allocate money for this?	
Buy-in - Do you have buy-in? Do your leaders, team, and members believe in this?	
Calling - Do you feel a calling to help make this happen and bring this to life?	
Excited - Are you excited about this? Do you have energy and heart to run after this goal?	
SO… WHERE DO YOU LAND?	

Interested in Talking?

Alright, are you ready to dive into a conversation with us here at ServiceReef? Great! Let's get started. Here's how this works next...

Step 1 - Contact Us
Reach out to use here at ServiceReef (support@servicereef.com) and let us know you're interested in the Local Engagement Tool. We'll get right back in touch with you to schedule a discovery call.

Step 2 - Discovery Call (30-60 minutes)
We start with a conversation to learn more about what you are doing and how this might be a good fit for both of us. And don't worry, we're happy to share if we don't think it's a great fit. Your success and satisfaction is far more important to us than just onboarding a new group like you!

Step 3 - Proposal
We will create a custom proposal for you based on your needs. That proposal will take into consideration how you plan to use the app, how many partners you will have, if you'll be covering partner organization subscriptions or not, plus a few more critical items.

Step 4 - Signed Agreement & Build (3-6 months)
Once you've read through the proposal and give us the green light, we'll start building your mobile app and the various other aspects of your project. We will provide you checklists for your tasks and timelines for the overall project.

Step 5 - Launch
Now it's time for your big day... it's time to launch your new mobile app and initiative for aggregated serving.

Step 6 - Support
Following launch, we're here for you for whatever support needs you might have as you continue to grow your aggregated serving strategy.
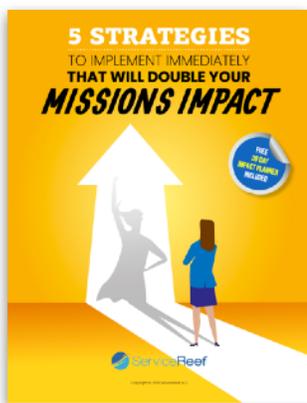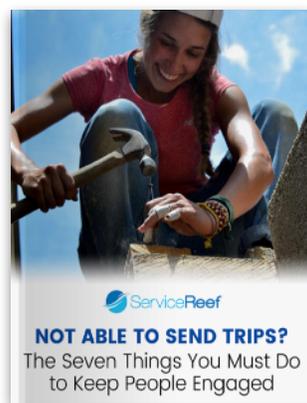
ServiceReef is an online platform for managing missional volunteerism (local, global, short term, and long term)

Find out more today at www.servicereef.com/local

Download other FREE resources from ServiceReef today:

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