



EFFECTIVE SHORT TERM TRIPS WORKSHEET LIBRARY

SECTION ONE
PRE EVENT ENGAGEMENT
STRATEGY WORKSHEETS

PURPOSE

Your first stage of engaging participants begins long before your actual event. These worksheets are created for you to have greater success for engaging your attendees before your event.

SERVICEREEF EVENT STRATEGY

Use this form to begin thinking through the key strategy elements for your upcoming opportunity.

GENERAL INFORMATION	
<p>General What is the goal/objective of this trip? - For Participants? - For the Organization? - For on-field Partners?</p>	
<p>Success What would success look like in the weeks following this trip? - For Participants? - For the Organization? - For on-field Partners?</p>	
<p>Team Leader What skills/experience is needed by the Team Leader(s) to make this successful and accomplish your goals above?</p>	
<p>Team Size/Makeup What is an appropriate size of team for this team to be a success? Is there a minimum/maximum number at which effectiveness starts to decline? Are there any key skills or talents that are needed to make this trip a success?</p>	
<p>Overall Vision How does this trip tie into the overall organizational vision? How can you start communicating with potential Team Leaders/Members to help share this vision?</p>	
<p>Envision the Future If you could talk to yourself in a year, what would be the key practices, processes, or actions you wish you would have implemented sooner?</p>	

SERVICEREEF GENERAL EVENT WORKSHEET

Use this form to begin mapping out the various fields available in ServiceReef for setting up your upcoming opportunity.

GENERAL INFORMATION	
General Trip Name, Start Date, End Date, When Available, Registration Deadline, Description, Privacy Level, Primary Contact, Opportunity Location	
Requirements Maximum Spots Available, Restrictions, Prerequisites, Responsibilities, Preparation Next Steps	
Meetings Name, Description, Location, Start Date/Time, End Date/Time, Required	
Financial Fundraising Goals, Milestones, General Donations, Donation Deadline, Account Event Code	
Budget Pre-Event Expenses, Event Expenses, Post-Event Expenses	
Application Application Fee, Application Required, Master Application, Application Questions	
Admins Event Admins, Admin Permissions	
Communications Team Email Communications, Communication Content, Dates	
Forms Form Title, Description, File Upload, Required,	
Resources Resource Title, File Upload	

SERVICEREEF EVENT MARKETING WORKSHEET

Consider the following triggers as means to market your upcoming event.

MARKETING TRIGGERS	
ALUMNI Who has served before? Who could they connect you with?	
PARTNER CONNECTIONS Who else does this partner know? How could this partner help create awareness?	
AUDIENCES Who is the audience for this event? Where does this audience "hang out"?	
CHANNELS What marketing channels could you use? What social media channels could you use?	
COLLATERAL What information sheets should you create?	

SERVICEREEF GENERAL EVENT PREP QUESTIONNAIRE

Use this worksheet to help you plan out the scope and details of your upcoming opportunity.

PREPARATION THOUGHT	OBJECTIVES
Can you clone this event from a previous one?	
Where and when is this event?	
Who is the audience for this event?	
Are there any privacy concerns?	
Who are the admins to manage this event?	
What are the maximum number of spots available?	
Will you have preparation meetings or retreats?	
What prerequisites and expectations do you have for participants?	
How much does each individual have to fundraise?	
Have you built a budget for this event?	
Do you have photos or videos to help tell the story?	
Will you use the master application?	
What trip specific questions do you need to ask?	
What preparation points do you need to cover?	
What forms are associated with this event?	
What resources do you want to share with this team?	

SECTION TWO

EVENT ENGAGEMENT

PLANNING AND COMMUNICATION WORKSHEETS

PURPOSE

Your second stage of engaging participants begins as team selection and planning begin. These worksheets are created for you to have greater success for engaging your attendees before your event.

SERVICEREEF SIMPLE BUDGET BUILDER

This is a simple way to look through what is needed from a Budget perspective. Think through various items like Travel Insurance, miscellaneous items that might be needed, construction costs, etc. that would apply for a specific trip.

	PRE-EVENT	EVENT	POST-EVENT
Travel Items			
Travel Total			
Meals Items			
Meals Total			
Lodging Items			
Lodging Total			
Projects & Supplies Items			
Projects & Supplies Total			
Activities Items			
Activities Total			
Emergency Items			
Emergency Total			
Other Items			
Other Total			
OVERALL TOTAL			

SERVICEREEF COMMUNICATIONS WORKBACK SCHEDULE

Use this worksheet to map out your preparation and follow up communications to your team. Remember this is how you are intentional to see them success on the trip and the engagement they have after they return.

What do they need to know as they prepare for the event?

What do they need to know for their best success during the event?

What do they need to know to stay engaged after the event?



PRE-EVENT COMMUNICATIONS

TITLE	COMMUNICATION POINTS	DAYS BEFORE EVENT	ATTACHMENTS OR LINKS

POST-EVENT COMMUNICATIONS

TITLE	COMMUNICATION POINTS	DAYS AFTER EVENT	ATTACHMENTS OR LINKS

SERVICEREEF WRITING A FUNDRAISING LETTER

Use this worksheet to help guide participants in writing a fundraising letter. This is a great way to walk through the key elements for all team members, regardless of experience.

GENERAL INFORMATION	
AUDIENCE Who are you inviting into your story? How are you inviting people into your story?	
GOALS Why are you wanting to participate in this trip? What are your personal goals? How do you want to see life differently after this opportunity? How is this going to make you a better person? What impact will this have on the world around you?	
CONTENT What do you need to tell people about? What isn't important to share?	
FUNDRAISING PAGE Cover Image Personal Profile Image Fundraising Letter Text Support Video	

SERVICEREEF PLANNING A RETREAT

Any type of team meeting, kickoff meeting, or retreat should have a clear objective in mind. Use this worksheet to make sure you are covering the key elements at the appropriate time.

GENERAL INFORMATION	
GOALS What is the purpose of this retreat? How would you define success? What expectations do you have of the attendees? What expectations do the attendees have of you?	
CONTENT What topics need to be covered during the retreat? What videos do you need to show? What books do you need to review?	
LOGISTICS Where is this retreat? What are the dates and times for this retreat? How much does this retreat cost? How will you get to the retreat? What do people need to pack? What meals do you need to prepare?	

SECTION THREE

ADDITIONAL RESOURCES

To find additional resources, please consider visiting the following communities powered by ServiceReef:

Additional Tips and Details from today's session:

<https://www.servicereefsupport.com/effectiveSTT>

If you would like to join a FREE community of other Trip Leaders for sharing best practices and asking specific questions related to your organization or trip, join us here:

<https://www.servicereefsupport.com/create-account>

Medical Missions and ServiceReef Integration questions:

<https://www.servicereefsupport.com/gmhc>