



young leadership council

leave your mark.

2015 Project Leader Manual

Physical Address: 1840 Euterpe St.
New Orleans, LA 70113

Mailing Address: P.O. Box 56909
New Orleans, LA 70156

Phone: 504.585.1500
Website: www.ylcnola.org

YLC Leadership

Executive Committee

President

T. Semmes Walmsley
semmes.walmsley@gmail.com

President-Elect

Calais Waring
calaishurst@gmail.com

Vice President, Communications

Vicki Bristol
vbristol@neworleanscvb.com

Vice President, Development

Stephen Parker Pate
stephen.pate@saints.nfl.com

Past President

Matthew A. Treuting, Esq.
mtreuting@bhbmlaw.com

Vice President, Projects

Joy Okoro
joy.okoro@teachforamerica.org

Vice President, Membership

Todd C. James
tjames@mathesbrierre.com

Treasurer

Jennifer M. Jeandron, CPA
jjjeandron@gmail.com

Secretary & General Counsel

Michael A. Harowski, Esq.
mharowski@frfirm.com

Directors

Kelley E. Bagayoko, Esq.
David T. Baker
Carolyn S. Buckley, Esq.
Charlie Fenton
September Hargrove
Ashley J. Heilprin, Esq.
Lindsey B. Jakiel Diulus
Daniel Jatres

McKensie Kirchner
Alex S. Lebow
Alexandra Navarre-Davis, Esq.
Brandon M. Roll
Jermaine L. Smith
Scott L. Sternberg
C. Garlan White
Jack Wiles, CPA

Staff

Curry W. Smith
Executive Director

Larissa Muetzel
Finance & Administration Director

Caitlin Rudin
Development Manager

Cate Gunnell
Membership & Programming Coordinator

Standing Committees

Communications Committee
Development Committee
Diversity Committee
Finance Committee

Membership Committee
Nominating Committee
Personnel Committee
Projects Committee

Project Leaders

College Admissions Project

cap@ylnola.org

Mark Clayton September Hargrove Christina Hendrick

Financial Peace University

mj.nodevco@gmail.com

John-Michael Johnson

Grant Writing Corps

grantwriting@ylnola.org

Christopher Anton Lindsey B. Jakiel Diulus Nicole Caridad Ralston

Illuminate NOLA

illuminate@ylnola.org

Buddy Boe Stephen Coburn Dianna Duffy Scott Sternberg

Leadership Development Series

lds@ylnola.org

Nicole Detillier Jacob Evans Erica Washington

One Book One New Orleans

obono@ylnola.org

Jessica Daigle Megan Holt Kaylee Smith Candace Weber

Power Ties

powerties@ylnola.org

Aimee McCarron Kevin Ferguson

Proud To Call It Home

proud@ylnola.org

Bryan Davis Serina Phoenix

RECreate

recreate@ylnola.org

Sam Davenport Alicia Labat Chincie Mouton Tim Robinson Samantha White

Toastmasters

toastmasters@ylnola.org

Beth Adams Mihnea Dobre Kelsey McGill Zach Monroe Kristin Wiseman

VITA

vita@ylnola.org

Danielle Boveland Sam Oliver

Wednesday at the Square

wats@ylnola.org

Sean Landry Kevin Roberts Gerard Schmitz Matt Treuting Kristin Wiseman

Where Ya' Rack?

wyr@ylnola.org

Zach Gorres Dan Jatres Ronnie Rodriguez

YLC Kicks

kicks@ylnola.org

Eric Kugler Richard Pavlick Alex Schoolfield

YLC Recycles

recycles@ylnola.org

Gabe Bordenave Michelle Cohen

* Group emails to all YLC Project Leaders can be sent to pl@ylnola.org.

Project Leader Responsibilities

Overview

By leading a YLC project, Project Leaders perform one of the most important functions in the organization. Generally, Project Leaders are responsible for the overall performance of their projects. Specifically, Project Leaders must:

- Prepare an annual work plan with project goals, then manage the project and track performance regularly.
- Prepare an annual budget and manage expenses according to the budget.
- Solicit and coordinate volunteers from the general YLC membership and other sources, as necessary.
- Promote the project by regularly attending JumpStart and YLC General Membership Meetings, submitting items for The Weekly Mark, and updating the designated board liaison about project progress via the monthly project status report.

Project Leader Standards

Every Project Leader must adhere to the following nine standards throughout his or her tenure.

1. Track and record *all* volunteer hours spent towards the project.

It is crucial for the YLC to keep records of who volunteers and how much time is spent on projects. This also allows YLC leadership to evaluate the impact of the organization and each project on the community-at-large. Oftentimes, volunteer hours are required for grant applications. In other words, if time sheets are not turned in, then the project's funding may be affected. The *only* way to avoid that is by timely handing in the sign-in sheets.

A standard sign-in sheet is attached to this manual. Return sign-in sheets to the YLC Membership & Programming Coordinator Cate Gunnell via email to cate@ylnola.org within seven days of the activity.

2. Submit project announcements to go in The Weekly Mark Newsletter.

If a project leader has any project news or announcements to list in The Weekly Mark Newsletter, he or she must submit them to Cate at cate@ylnola.org by Thursday before 5:00 p.m. each week. This weekly newsletter is sent to all YLC members (and some non-members who have signed up for updates) every Monday afternoon. It is the main method used to keep our constituents informed about project news, YLC events, and volunteer opportunities. If a project requires greater marketing, the project leader should contact the VP of Projects or the designated board liaison so that he/she can coordinate with the VP of Communications.

3. Submit monthly project status report.

Projects leaders must send the a monthly update to the Membership & Programming Coordinator, including the following information, which will be shared with the VP of Projects and YLC Board of Directors at its monthly meeting.

- Goals or updates for the project
- Meetings, events, volunteer opportunities or activities that have recently taken place (and recap accomplishments in general)
- Meetings, events, volunteer opportunities or activities planned for upcoming month or two
- Update on current and future expenses
- Any other information you feel the Board should be aware of

Monthly project status reports are to be submitted to the Membership & Programming Coordinator on the *first day of every month (unless otherwise requested)*.

4. Ensure all project events and activities are up-to-date on YLC website.

Project Leaders are expected to inform the YLC Membership & Programming Coordinator of any meetings, events or volunteer needs for their project in order to keep the website calendar and potential volunteers up-to-date on YLC activities. Submit all volunteer opportunity, committee meeting and project activity details to Cate at cate@ylnola.org with two weeks' worth of notice.

5. Hold eight project activities with volunteer participation each year.

By very definition the YLC exists to provide leadership development through community projects. Therefore, Project Leaders must ensure they provide enough volunteer opportunities to the YLC membership. It is suggested that each project hold at least eight activities per year. Activities can vary from planning meetings, to hands on volunteer opportunities to special events.

6. Attend at least four of six JumpStart Meetings each year.

JumpStart Meetings are specifically designed for new/prospective YLC members. It serves as a general orientation that allows members to learn about the member benefits and volunteer opportunities available through the YLC.

Project Leaders or designated volunteers are expected to come to a minimum of nine JumpStarts to briefly speak about their projects and volunteer needs. It helps to ensure that new members feel welcome and needed as volunteers. It is a great way to represent the organization and recruit members to YLC projects. On average, there are thirty new members at each meeting!

JumpStarts are held on the second Tuesday of every other month from 6:00-7:30 p.m. in the downstairs portion of the YLC Building.

7. Attend both Project Fairs (Jan./July) and at least four General Membership Meetings.

Project Leaders are required to showcase projects at both of the YLC Project Fairs normally held in January and July (in place of JumpStart Meetings). It is a great way for project leaders to recruit volunteers and spread the word about his or her project. *Project Fairs are usually held on the fourth Wednesday in both January and July from 6:00-8:00 p.m. (locations TBA).*

Project Leaders must also attend at least four General Membership Meetings throughout the year. Many people who attend these meetings are not yet volunteers, but are looking for ways to become involved. General Membership Meetings are generally held on the fourth Wednesday of the month from 6:00-8:00 p.m. in various venues around New Orleans.

Project leaders should bring fliers, project boards, handouts or sign-up sheets with them to pass around or leave near the check-in table at these membership meetings. It is an easy way to keep members informed on all of the volunteer opportunities available to them.

8. Get YLC members involved in their projects by contacting those that express an interest in their projects.

It is essential that members interested in volunteering for a project are contacted in a timely manner by the project leader. Nothing discourages a volunteer more than trying to become involved, but receiving no feedback or follow-through from the organization. The YLC depends on its Project Leaders to acknowledge, communicate with and welcome all potential volunteers.

When a member signs up and expresses interest in a project, that information is entered into the YLC database. At any point in time a project leader may request this information and it will be provided. It is expected that project leaders will request this information on a regular basis and contact potential volunteers within the same week they are given the contact information.

9. Complete a budget request for the project and manage expenses accordingly.

Each year in October/November, the YLC Finance Committee will engage in a budgeting process for the following year. Project Leaders are required to create budgets for their projects and submit them to the Finance Committee along with a Project Work Plan for the upcoming year. Any Project Leader that fails to present an annual budget in a timely manner may forfeit their opportunity to receive funding for their project.

YLC Board Governance

The YLC encourages Project Leaders to exercise discretion and manage their projects within the organization's framework. That is what the mission of the YLC is all about: *leadership development through hands-on community service*. However, Project Leaders are asked to always inform and work with the YLC Executive Committee on the following matters –

1. Anything that pertains to **marketing, communications and publicity**
2. Spending outside of your approved **budget**.
3. **Legal matters**, especially binding contracts/agreements, risk management issues and insurance matters.
4. Any **fundraising** and/or donor communication.

1. Marketing/Publicity

Aside from *The Weekly Mark* announcements and internal project communication, all marketing efforts must receive approval from the VP Communications and/or Executive Director. Press releases, public announcements, project logos and other graphics, brochures, T-shirt designs and all other marketing materials are to be directed to VP of Communications Vicki Bristol at vbristol@neworleanscvb.com and Curry Smith at curry@ylcnola.org.

Only the YLC President, Executive Director or their designees are permitted to speak on behalf of the YLC when the press or large audiences of people are involved unless otherwise approved.

Media and PR: All marketing efforts must receive approval from the VP of Communications and the Development Manager. This includes:

1. Press releases
2. Public announcements
3. Project logos and other graphics
4. Brochures
5. T-shirt designs
6. Website designs
7. All other marketing materials

Please direct materials to be approved to the 2015 VP of Communications Vicki Bristol at vbristol@neworleanscvb.com and Caitlin Rudin at caitlin@ylcnola.org.

Press releases should be put into the YLC Press Release template, which is available for download on the PL website. If you would like the YLC office to disseminate a press release for you, please put your content into the YLC Press Release template and send to Caitlin and the VP of Communications for approval. Once approved, Caitlin will send the release to the appropriate media outlets.

Only the YLC President, Executive Director, or their designees are permitted to speak on behalf of the YLC when the press or large audiences of people are involved unless otherwise approved.

2. Budgets

Annual Budget Proposals: The YLC only budgets for a year what funds it has raised in the prior year. Every October, Project Leaders must submit a Budget Request and Project Work Plan to the

Treasurer. The Finance Committee then holds Budget Hearings to review each project or committee request in detail by reviewing each line item. Project Leaders should be prepared to discuss their requested budget allocations. Budget Requests and Project Work Plan forms will be provided by the Treasurer.

To reallocate approved funds to different line items, Project Leaders must submit a request to the Finance Committee for approval of the reallocations.

Additional Budget Requests:

Once a Project Leader's budget has been approved, he or she must notify the Treasurer immediately of any anticipated variance of more than \$100 from the approved budget. ***Budget overages must be approved by the Board of Directors BEFORE spending is incurred.***

To request additional funding, a Project Leader must submit a new budget request to the Finance Committee and obtain Board approval for the additional funds. If the project leader spends funds before receiving the appropriate approvals, he or she will not be guaranteed reimbursement. The Finance Committee meets on the second Monday of each month. The Board of Directors meets on the second Wednesday of each month. Project Leaders must provide additional budget requests in advance of these meetings to be considered for approval.

Expenses:

If Project Leaders make any approved expenses and need to be reimbursed, a check request form* with appropriate documentation (ex: line itemized receipts or an invoice) must be submitted to the Director of Finance & Administration Larissa Muetzel at larissa@ylnola.org. Food and drink reimbursements must include a sign-in sheet for the event. Request for reimbursement should be submitted within 30 days of the project activity date. This is necessary for the YLC to accurately gauge its cash flow and maintain budget projects.

Project Leaders may also submit a check request for larger amounts that can be paid directly by the YLC. Contact the Director of Finance and Administration, Larissa Muetzel at larissa@ylnola.org directly for more details on the procedures for requesting a check.

3. Legal

Contracts: All contracts that will be entered into on behalf of the YLC must be forwarded to General Counsel Mike Harowski at mharowski@frfirm.com for review before being signed. This is very important to protect the interests of the YLC and its volunteers. Given the time demands for reviewing such contracts, contracts must be submitted **5 days** before they are required to be signed. They may be submitted to mharowski@frfirm.com.

Project leaders do not have any authority, express or implied, to enter into any contract on behalf of the YLC.

Records Retention: It is important that Project Leaders retain a copy of all contracts, correspondence, and other important documents regarding their project. Anytime a contract is executed, a copy must be submitted to the Secretary/General Counsel Mike Harowski at mharowski@frfirm.com and the YLC office to Larissa Muetzel at larissa@ylnola.org. The YLC office has a copier that can be used for these documents.

Background Checks: All staff and volunteers, who will have as part of their service with the YLC regular contact with minors under the age of 18, must have background screening completed satisfactorily **prior to beginning volunteer service** with minors. The YLC office is responsible for running the background checks for all volunteers and working with Project Leaders to coordinate the sharing of necessary information. It is the responsibility of the Project Leader to work with the YLC office to be certain that all volunteers with their respective projects have been properly cleared by the YLC prior to volunteering. *Please read the full policy, which is attached to this manual as an Addendum.* Project Leaders should contact Membership & Programming Coordinator Cate Gunnell at cate@ylnola.org to initiate background checks.

Insurance: The YLC maintains a Commercial General Liability insurance policy with limits of \$1,000,000 per occurrence/\$2,000,000 aggregate to cover the general operations of the organization. The policy, however, contains certain limitations and exclusions. Project Leaders should work with the General Counsel of the YLC and VP of Projects to discuss and identify the projected scope and activities of their project to be certain proper coverage is in place, and if not, they should plan to budget for extra coverage. If a Project Leader ever has any questions regarding insurance for the YLC, they should direct their inquiries to Larissa at larissa@ylnola.org.

Intellectual Property: The YLC owns the trademark to its name, as well as to, “New Orleans: Proud to call it home.” Therefore, it is important that the YLC protect its marks from being used by people/entities without the YLC’s expressed permission. If Project Leaders are approached about a person/entity using the YLC name/logo or Proud mark, please forward that request to the Secretary/General Counsel at mharowski@frfirm.com.

Additionally in considering communications for your project, please refer to the Appendix, *Intellectual Property Checklist for YLC Projects*.

4. Fundraising and Donor Relations

Fundraising: The VP of Development and the YLC staff are charged with primary responsibility of managing all fundraising efforts on behalf of the organization – no matter what project it pertains to. ***If a Project Leader would like to engage in fundraising for his or her project, he or she is encouraged to do so, but only in cooperation with the YLC office***, specifically Development Manager Caitlin Rudin and Executive Director Curry Smith. Email them at caitlin@ylnola.org and curry@ylnola.org.

This policy is not meant to bind project leaders in their efforts, but in fact, to support their efforts as the office staff has many existing relationships that can help them with their fundraising needs.

Donor Correspondence: All donations are acknowledged formally through the YLC office with a set system that allows for tracking in the master database and accounting software. If a Project Leader ever receives a donation directly, he or she should forward it to the YLC office for processing. Project Leaders are free to write their own thank you note directly to any donor any time, but they should provide the YLC staff with a copy to keep in the donor’s file at the office.

Any ongoing correspondence with a donor should be coordinated with Caitlin Rudin.

YLC Building Use

Project Leaders can use the YLC Building's first floor for meeting space at any time, *based on availability*. To book your project meeting/activity, email Larissa at larissa@ylcnola.org.

Accessing the Building: The YLC staff is not responsible for opening or closing up the building for you.

The key to the building is in a lockbox, which is placed on the iron gate (on top the mailbox). Project Leaders can get the key out by arranging the combination to read 3333. The access panel is on the right side of the lockbox itself and simply pushes up to reveal a key.

The key will access the first floor doors on the front and the back of the building. When the door is opened, the alarm will have a delay beep that goes off until an alarm code is entered and the ENTER button is pressed. The alarm will go off in one minute if the alarm is not properly turned off. If the alarm goes off for any reason, the alarm code should be entered again, and it should disarm. If that fails, **Larissa** should be contacted immediately on her cell phone to alert her that the alarm is sounding as the alarm company will call her for instructions on whether or not to send the police. **Larissa's cell phone number is 504.352.7383.**

Every project has its own code. Project Leaders will receive a business card with reminder instructions on the building and your code. They should carry them in their wallets at all times.

ADA Access to the YLC Building

During office hours, a guest in a wheelchair can access the YLC Building using the iron gate on the side of the building facing OC Haley Blvd. Once through the gate, there is a call button at the backdoor. The call button will ring a phone in the YLC office, and a member of the staff will come down to open the back door and assist the guest inside.

After hours when the staff is not on site, the Project Leader or Board Member in charge of the event taking place should ensure any guest arriving in a wheelchair knows to go to the side gate for entry, and they should open the back door of the building for entry.

In terms of parking, all disabled visitors are encouraged to park in the OC Haley lot nearest the side gate entryway.

Leaving the Building: When project leaders are ready to leave, they should make sure to empty all the garbage in the trash bin on the front side of building, make sure all lights are turned off and put the Heat/Air Conditioning Unit on 80 degrees in warm weather and 65 degrees in cold weather.

They should make sure all entry doors are closed. When the glass doors are locked in the backroom, the latches *on the inside* of each door should be secured by making sure the pins are in the lock position, then the main lock in the middle of the two doors should be locked. If the inside of the doors are not secured, someone can simply kick the doors in and break into the building.

Once all doors are closed and locked, the alarm must be set. When the alarm pad says: CHAMPION ALARMS. That means the system is ready to be armed. The COMMAND button and the numeral 1 should be entered. After a few seconds it will then say: ENTER PASSCODE. An

alarm code and ENTER should be entered. Then you will hear the delay beep. You have about 1 minute to leave the building and lock the doors.

Please ensure the building is clean and all doors are locked when leaving.

Taking Care of the Building: This is your space. Please take care of it by leaving it just as you found it.

- Arrive in enough time to set up the room like you want it and greet your guests. The staff is not responsible for set up or greeting your guests.
- There is a refrigerator in the kitchen on the first floor for you to bring in drinks and have ice for your meeting/activity, please keep it clean.
- There is a keg and white and red wine, as well as soft drinks, juice, and water for your use at meetings. Please make sure to log your drinks used. This will help us maintain an accurate account of who uses what. There is a log sheet on a clipboard on the kitchen counter.
- The sink is fully functioning in the kitchen, please keep it clean. Wipe down all counters and tables that you use, especially if you bring food in.
- There are two fully functioning bathrooms. Please make sure that there are paper towels and toilet paper stocked before you leave. And please wipe down the sink.
- Sweep up the floor and deposit all trash in a trash bag, then take your trash bag to the trash can. **Please do not leave any food, crumbs or trash anywhere in the building.**

Parking: YLC volunteers can park on Euterpe Street in front of the building, or they can use either the parking lot on the corner of Euterpe/OC Haley, or the one in the back of the building. Please put parking instructions in meeting announcements so everyone will know where to go upon arriving at the building.

Appendix

AN INTELLECTUAL PROPERTY CHECKLIST FOR YLC PROJECTS

1. Have all employees, contractors and consultants (including volunteers) involved in a given project executed an invention, copyright and trade secret assignment agreement?
2. Will any aspect of a given project involve trade secrets or proprietary information? Is there any aspect of the project YLC would want to keep confidential?
3. Is YLC planning to use any of its trademarks or service marks in conjunction with any part of the project?
 - a. If so, will any third parties use YLC's marks? If so, are the proper licensing agreements in place to control the use of YLC's marks (e.g., quality control)?
 - b. Are YLC's marks properly "tagged"? (i.e., are "TM", "SM", and ® properly used?)
 - c. Are any new trademarks being created? Should YLC seek federal registration for said marks?
 - d. If a new logo is created, has YLC secured the copyrights to the new logo from the designer?
 - e. Does YLC have the right to use all logos, slogans, phrases or other marks it plans to use in the manner in which it plans to use them? Should a search be conducted before adopting and investing in a trade name, trademark or service mark? Did YLC secure some indemnification from the designer to protect YLC in cases of infringement by the designer?
 - f. Is YLC properly using its trademarks and service marks in its branding? (for example, using trademarks and service marks as adjectives, and not as nouns, in advertising and brochures)
 - g. Should YLC utilize domestic and international trademark watching services in order to monitor the unauthorized use and registration of your marks by others?
 - h. Should YLC consider recordation of its registered trademark with the U.S. Customs Service in order to prevent unauthorized importation of counterfeit or gray market goods into the United States? (likely more important for consumer goods)
4. Is there a possibility that copyrightable material will be created during this project for YLC or on YLC's behalf?
 - a. If so, does YLC expect to own it, and are the proper agreements in place to ensure YLC does own it?
 - b. If a project creates a collective work, have all contributors signed the proper assignment agreements?
 - c. Can this work be considered a "work made for hire"? Does YLC have the necessary agreements in place to secure this status prior to creation of the work?
 - d. Should YLC file to register its copyrights in a work with the Copyright Office?
 - e. Is the work properly labeled? (i.e., proper use of copyright legend) If online, does every page of a website have the proper copyright legend on display?
 - f. Will the author expect to have any rights to the work after it is created (e.g., to include in a portfolio)? If so, has YLC granted the author rights to do so?
5. Will YLC register any new internet domain names related to this project?
 - a. Ensure that a trusted YLC employee registers the domain name in the name of YLC.
 - b. Ensure YLC has control of the account with the registrar, including login and password on the account related to the new domain name.
 - c. Does YLC have the right to use the new domain name? (see items above related to trademark clearance, indemnity, etc.)