



young leadership council

leave your mark.

2022 Project Leader Manual

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YLC Leadership

Executive Committee

President: Andrew Koehler, andrew.koehler@intralox.com
President-Elect: Patrick Hernandez, patrickahernandez@gmail.com
Past President: Lena McCloskey, yelena.mccloskey@firsthorizon.com
Secretary/General Counsel: Erica Sensenbrenner, erica.sensenbrenner@arlaw.com
VP of Communications: Blake Eckert, blake.eckert84@gmail.com
VP of Development: Lauren Michel, lmichel3@tulane.edu
VP of Finance: Gavin Pitre, gavinpitre21@gmail.com
VP of Membership: Josie Delaune, jodelaune@gmail.com
VP of Projects: Danielle Boveland, danielle.boveland@gmail.com

Board of Directors

Damon Carraby
Cassie Carreras
Cory Cheramie
Morgan England
Ryan Estaris
Katherine Hammer
Diana Hernadez

Kristie Kaaa
Esteban Largaespada
Jeremy McMullin
Olivia Mertensmeyer
Stephen Sewell
Liz Waller
Graham Williams

Staff

Camille Sumner, Executive Director, camille@ylcnola.org
Karin Curley, Director of Operations, karin@ylcnola.org

Standing Committees

Communications Committee
Development Committee
Executive Committee
Finance Committee
Gala Committee
Governance Committee
Projects Committee
Wednesday at the Square Committee
Membership Committee
Nominating Committee
Personnel Committee

Project Leader Responsibilities

Overview

Project Leaders perform one of the most important functions in the organization: they lead a group of their peers to successfully manage and implement projects that build volunteers as leaders. Through this, they have a positive impact on the quality of life in the Greater New Orleans Region.

This process includes:

- Preparing an annual work plan with project goals, managing the project, and tracking performance regularly.
- Preparing an annual budget and managing expenses according to the budget.
- Soliciting and coordinating volunteers from the general YLC membership and outside sources, as necessary.
- Identifying meaningful and specific leadership roles within their project and recruiting YLC members to take on those roles.
- Promoting the project by attending Jumpstart meetings, submitting items for *The Weekly Mark* and media sources, and updating the board and staff about project progress via monthly project status reports when requested.

Project Leader Expectations

Project Leaders must adhere to the following standards during their tenure:

1. Attend each of the quarterly Jumpstart Meetings.
2. Attend Project Fairs and general membership events.
3. Engage YLC members by contacting individuals expressing an interest in your project.
4. Hold eight project activities with volunteer participation each year.
5. Ensure all project events and activities are up-to-date on YLC website/Neon calendar.
6. Submit project announcements for The Weekly Mark newsletter.
7. Track and record ALL volunteer hours spent towards the project in Neon, YLC's online Membership Portal, or send to Director of Operations quarterly.
8. Submit a Monthly Project Status Report.
9. Complete a budget request for the project and manage expenses accordingly.

1. Attend each Jumpstart Meeting (4 - 6 per year).

Jumpstart Meetings serve as a general orientation for new/prospective YLC members to learn about the member benefits and volunteer opportunities available through the organization.

At least one Project Leader from each project is expected to attend Jumpstart Meetings where they will briefly speak about their projects and volunteer needs. This ensures new members

feel welcome and needed as volunteers. It's a great way to represent the organization and recruit members to YLC projects.

2. Attend Project Fairs and general membership events.

Project Leaders are required to showcase projects at YLC Project Fairs (one in January/February, second in September/October). These are a great way for Project Leaders to recruit volunteers and spread the word about his or her project.

Project Leaders should attend at least four general membership events throughout the year, including happy hours, leadership luncheons, or special events like the Leadership Symposium. Many people who attend these events have not yet volunteered, but are looking for ways to become involved.

Project Leaders should bring fliers or handouts to pass around or leave near the check-in table at membership events. This is an easy way to keep members informed on all the volunteer opportunities available to them. If you need assistance with fliers or handouts, please reach out to the Director of Operations or VP of Communications.

3. Engage YLC members by contacting individuals expressing an interest in your project.

It is essential that prospective volunteers 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-up from the organization. YLC depends on its Project Leaders to acknowledge, communicate with, and welcome all potential volunteers.

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

YLC exists to provide leadership development through community projects. Therefore, Project Leaders must ensure they provide volunteer opportunities to the YLC membership. It is suggested that each project holds a minimum of eight activities per year. Activities can vary from planning meetings to hands-on volunteer opportunities to special events.

5. Ensure all project events and activities are up-to-date on website calendar.

Project Leaders are expected to utilize NEON to list all meetings, events, or volunteer needs for their project; this keeps the website calendar and potential volunteers up-to-date on YLC activities.

6. Submit project announcements for The Weekly Mark newsletter and social media postings.

The Weekly Mark and our social media accounts are the main methods used to keep our constituents informed about project news, YLC events, and volunteer opportunities. The *Weekly Mark* goes out every Monday to our current members. Content for the *Weekly Mark* is populated first using the website calendar. If your event is published via Neon to our website's calendar in advance, it will automatically be included in the *Weekly Mark*. If there are specific images to go along with your event listing, please send them to the Director of Operations after creating your event in Neon.

Besides event announcements, Project Leaders are encouraged to create and share other content like general project news, a volunteer spotlight, or event recaps etc. Please submit this type of content to the Director of Operations. Submissions must be made by Thursday at 3 p.m. for inclusion in the following week's newsletter, or with at least 48 hours advance notice for social media posting. With your request, please include a photo, the article write-up/information answering: *Who? What? When? Where?* etc.

If a project requires greater marketing, the Project Leader should contact the VP of Communications to create a communications strategy that will work best for the project's purposes.

7. Track and Record volunteer hours.

It's crucial for YLC to keep records of volunteers and how much time is spent on projects. This allows YLC leadership to evaluate the impact of the organization and projects on the community-at-large. Volunteer hours are required for grant applications. When volunteer hours are not captured in Neon for record-keeping, this can impact a project's funding.

To Log Volunteer Hours:

1. Volunteers can RSVP for a YLC project meeting, activity, or volunteer shift in advance in Neon.
2. To check off those who have attended, go to the Event Page and click the link labeled "Mark Attendance." From there, you can check the box next to their names in Neon.
3. To add volunteers who did not register in advance, go to Register on the Event Page. This will allow you to input a member's name, and it will auto-populate if they are currently in NEON.

A standard sign-in sheet may be used to capture names on-site. Project Leaders will need to add unregistered volunteers to the event and marked as "Attended" for the person and the project to receive volunteer hours.

8. Submit a Monthly Project Status Report.

Project Leaders must send a monthly update report (using the provided template) to the VP of Projects to be shared with the YLC Board of Directors.

Please include:

- Goals or updates for the project
- Meetings, events, volunteer opportunities, or activities that have taken place
- Successes your project experienced
- Issues/struggles your project experienced
- Meetings, events, volunteer opportunities or activities planned for the upcoming month.

- Upcoming volunteer or leadership development opportunities for your project
- Any other information you feel the Board should be aware of

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

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 the opportunity to receive funding for their project.

YLC Board Governance

Project Leaders exercising discretion and managing their projects within the organization's framework is the YLC mission in action: leadership development through hands-on community service.

Project Leaders are asked to always inform and work with the YLC Executive Committee on the following matters:

1. Marketing, communications and publicity.
2. Potential spending outside of your approved budget.
3. Legal matters, especially binding contracts/agreements, risk management issues, and insurance matters.
4. Fundraising and/or donor communication.
5. Engaging government officials and policy makers

1. Marketing/Publicity

Marketing Materials: Aside from *The Weekly Mark* announcements and internal project communication, marketing efforts should be reviewed and approved by the VP Communications and/or Director of Operations. They will flag items that need review by the Executive Director. We do have a professional graphic designer that can be employed for specific projects as needed.

This includes:

1. Social Media Posts
2. Emails to your listservs
3. Press releases
4. Public announcements
5. Project logos and other graphics
6. Brochures
7. T-shirt designs
8. Website designs
9. All other marketing materials

Media and PR: If you have an upcoming program that you'd like to distribute to the press, please email the VP of Communications and/or Director of Operations. They will guide you through the writing process, insights on how to pitch the story to the media, and more.

Once written, all press releases should be sent to the Director of Operations or VP of Communications for review; they will then be shared with the Executive Director for approval. Once approved, staff/contractor will send the release to the appropriate media outlets.

****Please note that 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: YLC budgets for the upcoming year funds that have been raised in the prior year. Every October, Project Leaders must submit a Budget Request and Project Work Plan to the YLC Treasurer. The Finance Committee 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. New Budget Requests and Project Work Plan forms will be provided by the Treasurer annually.

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'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 the funds prior to receiving the appropriate approval, he or she will not be guaranteed reimbursement. The Finance Committee typically meets the third Friday of each month. The Board of Directors typically meets the last Monday 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 YLC Director of Operations. **Food and drink reimbursements must include a sign-in sheet or list of attendees for the event.** Request for reimbursement should be submitted within 30 days of the project activity date.

Project Leaders may submit a check request for larger amounts that can be paid directly to the vendor by YLC. Contact the YLC Director of Operations directly for more details on the procedures for requesting a check.

3. Legal

Contracts: All contracts that are entered into on behalf of YLC must be forwarded to the Executive Director and General Counsel prior to being signed by an authorized YLC signer. Given the time demands for reviewing such contracts, **contracts must be submitted no less than two weeks before they are required to be signed.** Project Leaders do not have any authority, express or implied, to enter into any contract on behalf of the YLC.

Records Retention: Project Leaders must retain a copy of all contracts, correspondence, and other important documents related to their project. When a contract is executed, a copy must be submitted to the Director of Operations.

Background Checks: Staff and volunteers who, as part of their service with the YLC, have

regular contact with minors under the age of 18 must complete a background screening completed prior to beginning volunteer service with minors.

The YLC staff is responsible for running the background checks on volunteers and works with Project Leaders to coordinate the collection of necessary information. It is the responsibility of the Project Leader to work with the YLC office and ensure all volunteers have been properly cleared by the YLC prior to volunteering. Project Leaders should contact the Director of Operations to initiate background checks.

Insurance: 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; 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 the Director of Operations.

Intellectual Property: YLC owns the trademark to its name and Wednesday at the Square, as well as to the “New Orleans: Proud to call it home” slogan. YLC protects 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 and Executive Director.

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, YLC Board of Directors, and Executive Director are charged with the primary responsibility of fundraising 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 the Executive Director.

This policy is not meant to bind Project Leaders in their efforts, but to support their efforts. The staff and board have many existing relationships that can help Project Leaders achieve their fundraising goals. They can also provide coaching and support on how to craft a fundraising ask.

Donor Correspondence: All donations are acknowledged formally through the YLC office with a system that allows for tracking in the master database and accounting software.

If a Project Leader ever receives a donation directly, they should forward it to the YLC office for

processing. Project Leaders are free to write their own thank you note directly to donors, but they should provide the YLC staff with a copy to keep in the donor's file at the office.

Ongoing correspondence with a donor should be coordinated with the VP of Development and Executive Director.

Sponsorship, In-Kind Donations, and Donations: All donations, whether they be in-kind, sponsorships, or financial contributions, must be coordinated through YLC staff. The staff welcomes fundraising ideas and want to support project leaders in soliciting resources for projects, but coordination is key to long-term donor stewardship and to preventing confusion and double-asks.

YLC Building Use

Project Leaders can use the YLC Building's second floor for meeting space based on availability. To book your project meeting/activity, email the Director of Operations.

1. Accessing the Building

YLC staff is not responsible for opening or closing up the building for you.

1. Project Leaders are provided with the access code to the lock box on the front gate.
2. When the gate is opened, the alarm will have a delay beep that goes off for one minute or until deactivated.
3. To deactivate the alarm, you will enter your project alarm code into the box on the left wall by the front door (and then press ENT) It will have a delayed beep to let you know you've successfully disabled the alarm.
4. If the alarm goes off for any reason, the alarm code should be entered again, and it should disarm. **If the alarm is going off accidentally, the security company is first directed to call the office line - so please answer the phone if it rings and notify the company that it is a false alarm! If that fails, Karin should be contacted immediately at (504) 914-9322 to alert her that the alarm is sounding; calling her is essential to ensuring the police are not dispatched.**

Every project has its own alarm code. Project Leaders will receive an email with reminder instructions on the building and your code. You should store it in a safe, accessible place.

2. Leaving the Building

When Project Leaders are ready to leave, they should:

1. Clean up any plates, glasses, or utensils used - empty all garbage into the main kitchen can, bring the bag downstairs to the outside bin if full. Wash any dishes used.
2. Turn off all lights
3. Adjust AC/Heating temp accordingly to save energy (if it was altered, otherwise it will run on a schedule)

To exit the building:

- Be sure that the front gate is shut prior to arming the alarm.
- Enter your four-digit code, and then hit ENT. This will enable the alarm.
- You have about 40 seconds to exit the building.
- Be sure to lock the front door prior to locking the gate and replacing the key in the lockbox.

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

3. Taking Care of the Building

This is your space, but it is also a communal space designed to create collaboration between staff, the board, project leaders, and members. Please take care of it by leaving it just as you found it.

- Arrive in enough time to set up the room and technology as you want it and greet your guests. The staff is not responsible for setting up or greeting your guests.
- There is a refrigerator for you to bring in drinks and for your meeting/activity. Please keep it clean.
- 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. We encourage you to use the non-disposable plates, glasses, and utensils. Please clean them after use.
- Please make sure the bathroom has paper towels and toilet paper before you leave.
- Sweep up the floor and deposit all trash and recycling 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.

4. Parking

YLC volunteers can park on Euterpe Street in front of the building. Please put parking instructions in meeting announcements so everyone will know where to go upon arriving at the building.

YLC Reimbursements, Contracts, and Donation Asks

Reimbursements and Check Requests

- The check request form can be found in the Project Leader Resources SharePoint Folder: <https://ylcnola.sharepoint.com/:f:/s/YoungLeadershipCouncilSharedSite/EnBrKFNVRwRJyS3WwgCsGoBHGFarhymEGpChOIMWBwR4Q?e=MYOy4t>
- Send required documentation to Karin Curley, YLC Director of Operations, at karin@ylcnola.org.
- Reimbursements and check requests submitted with appropriate documentation prior to noon on Thursdays will be reviewed and processed in that week's unpaid bills report, which goes out for approval on Fridays. Any reimbursements or check requests received after 12pm on Thursdays will be reviewed and processed the following Thursday. If requesting reimbursement, payment via ACH is preferred. After your request is approved, look for an email from YLC's Bill.com Account prompting you to enter your banking information. If you prefer payment via check in the mail, please alert Director of Operations when making request.
- When requesting checks and reimbursements for external parties/vendors, please anticipate a two week turn around.

Contracts and Agreements

Send documents to the VP of Projects. They will coordinate approval with the Executive Director, and whether General Counsel will need to review. Because the complexity of contracts varies significantly and may require additional research, please anticipate no less than a two week turn-around.

APPENDIX

1. Monthly Status Report Template
2. Mid-Year Status Report Template
3. Internal communication tools and procedures
4. Intellectual Property Checklist



Monthly Status Report

Project Name:

For the Board/Donor Relations:

- 1. We know you've been busy, and we want to hear about it! Please list the events and volunteer opportunities your project had this month.**
- 2. In your 2022 workplan, you laid out metrics you would use to measure success for the year. Please provide an update of your progress measured in those parameters.**
- 3. Are there any special events, meetings or projects scheduled for next month that you'd like the Board or staff to be aware of?**

Optional:

- 4. Toot your own horn! Give us a recap, anecdote, or success story from your best activity this month. This can include a special event, a teambuilding activity, an example of leadership-in-action, or an interesting accomplishment or milestone. Please include a photo if available.**
- 5. "Volunteer Spotlight" for the *Weekly Mark* and social media: Give special kudos to a volunteer who really stood out this month! Tell us their name and up to three sentences on what they've done for your project. Please include a photo.**

****Are there any upcoming special events, meetings, volunteer opportunities or leadership opportunities next month that you want highlighted in the *Weekly Mark* or on social media? Please email all this info (and images if possible!) to VP of Communications and Director of Operations.**



2022 Mid-Year Project Report

Project Name:

- 1. Please provide a short update on your project's 2022 goals (either from your original workplan or your reshaped goals). Reflecting on your these, how are you tracking to meet those goals?**
- 2. Building connections virtually is a difficult task. Please list anything that you are doing to engage volunteers to set them on the path for future project leadership. Do you have 2023 Project Leaders secured, or in the leadership pipeline? Is there anything that the VP of Projects or the Board can do to help?**
- 3. Are there any special events, meetings or projects scheduled for the rest of the year that you'd like the Board or staff to be aware of?**
- 4. Are there any challenges that your project is currently facing that you'd like the Board or staff to be aware of? Is there anything that the VP of Projects or the Board President can do to help?**
- 5. Are there any specific areas of training that YLC can deliver to help set your project up for future continued success?**
- 6. Are there any areas of improvement that you think the Board, staff, or VP of Projects could put more effort into? (Be honest, you won't hurt anyone's feelings!)**

Internal Communication tools and procedures:

Every project has an '@ylcnola.org' distribution email address that should be listed on the website and other project marketing collateral, and which forwards to the personal email addresses of all Project Leaders for that specific project. The distribution list enables easier communication between project leaders, board, staff etc. and for the public as a whole to reach all PLs at once. Please reach out to the Director of Operations if you believe you are not properly included on your project's distribution list.

ALL current Project Leaders can be reached by emailing pl@ylcnola.org.

Project Leaders can use whatever communication or collaboration tools they would like to manage their own data and workflows **BUT** YLC requests that PLs share relevant documents, images etc. on a quarterly basis for storing on YLC's own shared drive via Microsoft Suite's Sharepoint service, so that staff can access up-to-date information and collateral as needed.

Project distribution list email addresses can be converted to an email inbox, which can be accessed online by all project leaders - this can also be used to access YLC Sharepoint and create your own project-specific shared site. If your project is interested in this, please discuss it with the Director of Operations.

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.)