

Defining Community Service Projects and Reportable Volunteer Information

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GENERAL

The purpose of this practice is to define what is and what is not considered an official (or reportable) Pioneer community service project. In addition, this practice provides the details needed for reporting required volunteer information on approved community service projects. This information will be reported on the quarterly Community Service Activity Report, hereafter referred to as the “PA7” report.

WHY A PA7 REPORT?

The primary reasons for the PA-7 report are to provide a vehicle to document and assess the impact of Pioneers activities.

Impact on Community

- ◆ Provides a documented account of Pioneers contributions to the communities in which we live, work and serve
- ◆ Demonstrates Pioneers “giving back” and answering the call
- ◆ Indicative of support to address human and social needs
- ◆ Identifies the equivalent dollar value of volunteer hours rendered
- ◆ Demonstrates the variety of areas in which Pioneers bridge the gap

Impact on Sponsor Company

- ◆ Provides means to demonstrate tie-in to corporate social responsibility
- ◆ Provides a method to capture actual occurrences and opportunities to provide sponsor visibility
- ◆ Demonstrates level of involvement of current and former employees and others
- ◆ Provides a measurable means to demonstrate the extended presence of the sponsor company in the community
- ◆ Aligns us with business expectations of measuring bottom line
- ◆ Provides substantiation to reinforce, solicit, and/or enhance level of corporate support and demonstrate results/impact of that support

Impact to our Partnerships and Alliances

- ◆ Means to substantiate volunteer activity – lends credibility to data
- ◆ Helps to distinguish us as a leading volunteer organization
- ◆ Provides basis for others to want to align with us in our community efforts and presence
- ◆ Means to assess their projects, programs as well

Impact to Pioneers

- ◆ Provides a leadership tool for Pioneer leaders at all levels of the organization to assess unit involvement, allocation of resources, etc.
- ◆ Provides a tool to assess and evaluate project acceptance and continuance
- ◆ Allows the TelecomPioneers to quantify project deliverables
- ◆ Means to determine our effectiveness in recruiting, retaining and engaging others

- ◆ Provides a way to track number of members
- ◆ Provides a means to acknowledge and celebrate our contributions
- ◆ Demonstrates the level of our joint commitment to “building healthy communities”
- ◆ Reinforces the reason for our existence
- ◆ Demonstrates the collective “Power of Pioneering”

WHAT TO REPORT

Projects

There are organization-wide projects that all units need to track. The different projects are listed below by category.

Education

- Project:Connect
- 911 Call Simulator
- Computers for Schools
- Hot Tips
- Junior Achievement
- Playground Maps
- Read to Me Kits
- Smart Bears

Environmental

- Adopt A Mile Park/Beach

Life Enrichment/Health & Human Services

- Beep Baseball
- Easy Access
- Habitat for Humanity
- Heart Pillows
- Hot Trikes
- Hug a Bear
- Talking Books

Optional Projects

The **General Activities** section was created to give Pioneers an opportunity to track all the valuable time they spend on administrative activities or activities involving more than one project. This section of the PA7 is *optional*. Use the descriptions below to determine what should be tracked

Fundraising for Multiple Projects

- Use this category for fundraising that will raise money for more than one project. For example, if you hold a food sale which benefits multiple projects.

- Do not use this category if a fundraising activity will only benefit one project. If a fundraising activity only benefits one project, the hours and participants should only be counted with that project.
- Hours should cover time spent in support of community service projects. Hours spent in support of projects that are solely fellowship in nature should not be counted here.

Newsletter/Communication for Multiple Projects

- Use this category for tracking volunteer work associated with publication of the newsletter or any other type of communication materials for more than one project.
- Do not use this category if you are creating material about a specific project, in that case, indicate the hours and participants in that project's category.

Planning for Multiple Projects

- Use this category for planning and/or administrative duties that encompass more than one project.
- Examples of this include inputting numbers into the PA7 or completing a budget for the year.
- This also includes volunteer hours spent contacting and signing new members and maintaining database records of membership.
- Officers and committee chairpersons' volunteer time spent organizing and conducting the business of the club pertaining to non-fellowship events is included in this category.
- This does not include planning or administrative duties, which focus on one particular project such as Junior Achievement. Planning and administrative hours for a specific project need to be assigned to that project specifically.
- Hours should cover time spent in support of community service projects. Hours spent in support projects, which are solely fellowship in nature, should not be counted here.

Pioneer Store Volunteering

- Use this category for tracking volunteering in the Pioneer store. This does not include any paid time for participants.

Other General Activities

- Use this category for anything that will not fit in the list above that relates to Pioneer general activities for multiple projects. You will need to list each project under the "Other" heading.

What else should you report?

You need to input additional projects for which you participated. You can add projects for tracking if they meet the following general qualifications:

Three questions?

1. Has the Pioneer unit approved the project?
2. Does the project address a community service need?
3. Who does the project help?

Answers to these questions:

1. The Pioneer unit must approve the project.
2. The project answers a need in the community.
3. The project helps people outside of the Pioneer organization.

If your answers match those above.....The project is reportable!

Determining if a Project is a “Reportable Community Service Project”

Following are descriptions of the three key questions above. If the answer to every question is “yes”, then the project qualifies as a “reportable community service project”. If the answer to one or more of the questions is “no”, then the project does not qualify as a “reportable community service project”. The fact that a project does not qualify as a “reportable community service project” does not necessarily mean your Pioneer unit should not be doing it. It just means that particular project does not get reported as a community service effort on the PA7 report.

Question 1: Has the project been officially approved by your Pioneer unit’s committee or by whoever has been given project approval authority in your group?

In other words, has your chapter, council or club given its official approval to have the Pioneer name (and your sponsor company name) associated with this project? Periodically, preferably each year, your committee or your unit’s designated approval authority should approve which projects the Pioneer unit will undertake.

This approval indicates that the project is truly a **Pioneer** project and not community service work individuals are doing as general members of the community or as members of other community service organizations (e.g., Lions, Jaycees, churches). For example,

if a Pioneer happens to take a neighbor to the hospital or to a doctor's appointment as an act of kindness in being a good neighbor; that is not considered a reportable Pioneer community service activity. On the other hand, if the Pioneer unit starts up a community shuttle service where people in the community could call Pioneers for assistance in getting to doctor's appointments, then all such work effort should be reported on the PA7 report. This is not meant to diminish the value of the community service work some of our members provide as non-Pioneers, but rather to make sure only officially approved Pioneer projects are included in our Pioneer reports.

Question 2: Does the project address a "community service" need?

Does the project get to the heart of our Pioneer tag line - "Answering The Call Of Those In Need"? Does the project assist those in the community who truly need our help?

If the project is a fellowship event, this obviously is not a community service project. A project where your sponsor company asks the Pioneers to staff a booth to help answer questions on the roll-out of a new product or service is not considered a community service project. Fund-raising projects, where the net proceeds go into your unit's general fund, should not be reported in the top three categories of the PA7 report. All of these examples are still vital projects, which your Pioneer unit should run, but they should not be reported as "community service" projects, unless you choose to indicate these projects under **<General Activities>**. (Note: Fund-raising projects, where the proceeds are to support a specific community service need, should be reported for the individual project.

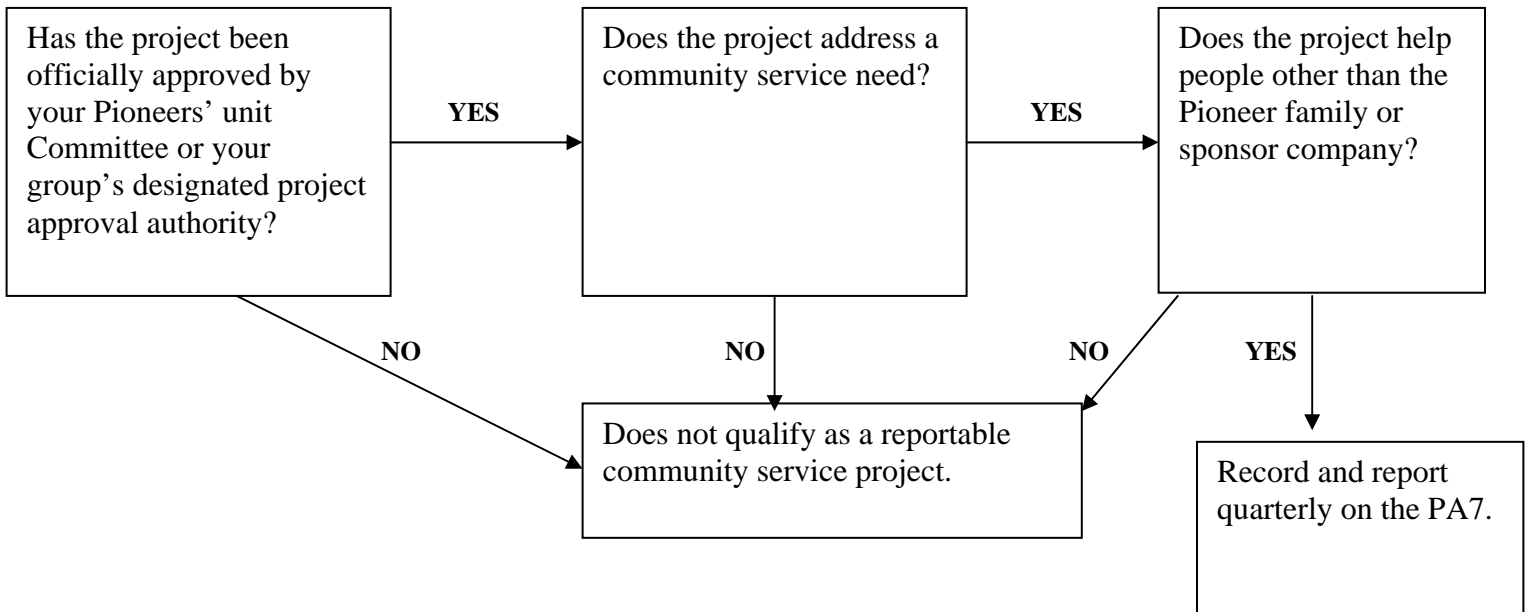
Question 3: Does the project help people other than the Pioneer family or the sponsor company?

For a project to be counted as a community service project on the PA7 report, the project must benefit the open community, not just employees of your sponsor company or your Pioneer unit. This addresses the term commonly known as "HOOP", which stands for Helping Our Own People. HOOP projects, while important, are not counted as community service projects since the inclusion of these can jeopardize our "charitable fraternal" IRS classification and tax status. Based on a 1989 Association Board of Directors decision, hours for HOOP activities are not to be included on the PA7 report. Following is an example of two similar projects, one which would not be reported as a community service project and one which would be reported.

Example 1: A hurricane or flood devastates your area. The Pioneers mobilize and contact all employees of your sponsor company to find out if any employee families need assistance. The Pioneers then respond to those needs by raising money, gathering food and clothing, and delivering those items to the employees and their family members. While this is a very worthwhile and needed effort, this does not qualify as a reportable community service project since the work effort was designed to specifically benefit only our employees who were in need.

Example 2: A hurricane or flood devastates your area. The Pioneers mobilize and form a disaster relief shelter and supply center for the community. Anyone in the community can receive the same assistance from the Pioneers. Since this work effort is not designed to benefit just the employees, but rather the community as a whole, this project does qualify as a reportable community service project. Thus, all participation, including that spent helping our own employees, should be reported.

Summary Flowchart - Determining Reportable Community Service Projects



The above flowchart summarizes the three major questions to be answered in the affirmative before a project is determined to be reportable as a community service project on the PA7 report. Answering “no” to any of the three questions does *not* mean the project is not important or that it should not be run. It just means that the project participation information does not get grouped in with reportable community service project information on the PA7 report.

Miscellaneous Questions

While this practice can't answer every question concerning what is and is not reportable, there are two commonly asked questions. The first is whether a “project” has to involve more than one person. While most of our projects do involve group activities, there are situations where only one person in your Pioneer unit is involved in a project. For example, you might have just one Pioneer working on the Talking Book repairs. While it is hoped more people would become involved, if only one person is providing this community service in the name of the Pioneers, then by all means report it.

The second question asks if a Pioneer has to be working on the project for it to be considered a Pioneer project. You might very well have a project where only Partners are involved. As long as you answered “yes” to the three previously mentioned questions, the project qualifies. If a project, though, has no Pioneer or Partner involvement, then in all probability it is not really a Pioneer project and should not be reported.

COMMUNITY SERVICE ACTIVITY REPORT - PA7

Information for the PA7 needs to be entered on the PA7 web database by the following deadlines:

<u>Quarter</u>	<u>Due Date</u>
Jan. – Mar.	April 25
Apr. – June	July 25
July – Sept.	Oct. 25
Oct. – Dec	Jan. 25

The quarterly PA7 report should reflect as accurately as possible the participation information for the period being reported. However, you may include project information for any Pioneer project being run in the current Pioneer year (January – December). For example, if you are completing the third quarter report (July – September) and one of your project managers turns in participation information not previously reported for a project that was run in June, you may include that in your report since June data is part of the current Pioneer year. If another project leader turns in participation information for a project run last December, you would not report it on the PA7 as last December is not part of the current Pioneer year.

SAMPLE PA7 SPREADSHEET

This is a sample of the PA7 Excel spreadsheet. **Please refer to the document on *Using the PA7 On-line for specific step-by-step instructions on using the PA7 on the Web*.**

Bold letters (A, B, C,...through O) in the remainder of this practice refer to points on Exhibit I.

Project Categories

The PA7 report groups projects into four categories:

- A** - Education
- B** - Environmental
- C** - Life Enrichment/Health & Human Services
 - General Activities - *optional*

There is a need for certain projects to be highlighted on the PA7 report in each of the three top categories. For the most part, these are Heart of Pioneering projects or they relate to Association-sponsored projects/products. The fact that these projects are specifically listed on the PA7 report does not mean every Pioneer unit (council/club) must be involved in every project. It is hoped, though, that each of these projects will be adopted in every chapter by at least one of their Pioneer units.

In the area of Education (**A**), nine specific projects are identified on the summary PA7 report submitted quarterly to the TelecomPioneers. All other education projects beyond these nine are summarized together on line 11. The nine specific education projects, and their associated line numbers on the report, are as follows:

<u>Line #</u>	<u>Project</u>
1	Junior Achievement-Canada
2	Junior Achievement-USA
3	Playground Maps / E-MAPS
4	Read-to-Me Kits
5	Computers for Schools
6	Hot Tips
7	Project:Connect
8	Smart Bears
9	911 Simulator

In the area of Environment (**B**), only one specific project is identified, that being the Adopt-A-Mile/Park/Beach clean-up projects (line 13). All other environmental projects are summarized together on line 14.

In the area of Life Enrichment / Health & Human Services (**C**), seven specific projects are identified. All other such projects are summarized together on line 23. The seven specific projects are:

<u>Line #</u>	<u>Project</u>
16	Habitat for Humanity
17	Heart Pillows
18	Talking Books
19	Hot Trikes
20	Easy Access
21	Hug-a-Bears
22	Beep Baseball

In addition to gathering project information in the three project categories mentioned earlier, the PA7 report gathers three types of information for each approved project :

D - Hours

E - Number of participants

F - Quantities completed

To enter additional projects, you need to enter the name of the project under one of the “Other” categories for Education, Environmental or Life Enrichment on the July worksheet.

For “Hours (D)” and “Participants (E)” information, data is gathered in four categories. These four categories are:

- Regular Member Pioneers
- Life Member Pioneers (includes Affiliate Life Members)
 - Partners/Family (includes Partners as defined in the TPA constitution, as well as immediate family members)
 - Other (includes relatives other than the immediate family, non-member employees, friends and anyone else who is a non-Pioneer)

Hours (D)

Reportable hours (in 15 minute increments) include all hours spent planning the project, fund raising if done specifically to support this project, travel time associated with the project and time spent actually working on the project. Volunteer hours worked on Pioneer community service projects while on company-paid time are considered reportable hours.

“**Actual time spent**” is to be used whenever possible for the reporting of hours. However, estimates or “**certified hours**” may be used in those cases where it is not feasible to determine actual hours spent. Use of “certified” hours is a group option and a group may determine that only actual hours will be used for reporting purposes in their group if they so choose.

Certified hour estimates or formulas must be approved by the Pioneer unit’s committee prior to being used and must be based on a quantifiable study done by the Pioneer unit. For example, the amount of time people actually spend removing pop top tabs (a popular fund-raising project to support community service projects) is probably not easily identified. A study might indicate it takes two seconds to remove a tab, and a sample count shows there are 2,000 tabs in a 10 pound container. Armed with this information, one might state that for every 10 pounds of tabs collected, one hour of community service was contributed (2 seconds x 2000 tabs divided by 3600 seconds in an hour).

An example of a bad “estimate” would be to say that you were going to claim one hour for every can of food contributed for a food drive. Most people are not driving to the store to buy one can of food for a food drive. Be accurate and reasonable in deriving any formulas used for “certified” hours.

Pioneer hours volunteered on projects initiated, sponsored or controlled by other volunteer agencies do not qualify unless approved and supported by the chapter, council or club executive committee or your group’s designated project approval authority. If a project is initiated by another organization and approved by your Pioneer unit, only those hours generated by your Pioneer unit are to be reported and not those of the other sponsor organization. On the other hand, if the Pioneers were the initiators of the project and recruited other organizations to join in, then all hours should be counted, with those from the “other” organizations being reported in the “other” category. When a project/program has been completed and ownership has been turned over to an outside

group or agency such as a school, hospital or nursing home, hours can no longer be reported.

Participants (E)

This section of the report captures the number of people who worked on the project and contributed the hours. A person should be counted only once during a Pioneer year (January – December) for a given project. Most of our projects are short term in duration and this information is easily attainable. A generic Project Sign-in Sheet is attached (see Exhibit II) which will simplify the gathering of this information for the Pioneer units.

Some of our projects are ongoing, with individuals helping out on more than one occasion during the Pioneer year. For example, a person might have worked on the Hug-a-Bear project four times during the year (once a quarter), and worked 4 hours each time. The individual should be counted as a participant only once (during the first quarter), but their 4 hours would be reported every quarter.

It should be noted that if your company needs to report the number of people who have participated in at least one project during the year, this report does not provide that information. A mechanized data base with individual names would have to be created to provide that information. The participant information by project reflects how many people we had working on that project during the year. The grand total of all participants on all projects (line 25) reflects not the total number of participants on all of our projects, but rather the number of participant occurrences. Since many of our participants assist on more than one project, those people are counted more than once in the grand total.

Quantities Completed (F)

To help determine the impact of Pioneering on the community, one key indicator for each project needs to be identified and tracked. For those projects specifically listed on the PA7 report, those key indicators have been identified and defined below.

Education:

Project:Connect	Number of children participating
911 Call Simulator	Number of demonstrations
Computers for Schools	Number of computers placed, installed and working in schools
Hot Tips	Number of kits distributed
Junior Achievement	Number of programs delivered – a program is an entire series (e.g. series of 5 presentations)
Playground Maps	Number of maps completed
Read to Me Kits	Number of kits distributed
Read*Write*Now*	Number of booklets distributed
Smart Bears	Number of Smart Bears distributed

Environmental:

Adopt A Mile Park/Beach Number of projects completed

Life Enrichment/Health & Human Services:

Beep Baseball Number of balls/base sets distributed
 Easy Access Number of projects completed
 Habitat for Humanity Number of homes completed
 Heart Pillows Number of pillows distributed
 Hot Trikes Number of trikes distributed
 Hug a Bear Number of bears distributed
 Talking Books Number of cassettes or talking books repaired

For all other projects (those reported in the “other” categories), the local Pioneer unit should make its own determination of what the key indicator is. The total of your “other” projects’ quantities is not included on the chapter’s PA7 report, although you should maintain that information locally to answer questions which might arise in the future.

EXHIBIT I – PA7 SAMPLE EXCEL SPREADSHEET

	Project Name	HOURS				Total	PA	
		Life Member	Regular Member	Partner	Other		Life Member	Regular Member
(A)	Education:							
	1 Junior Achievement - Canada							
	2 Junior Achievement - USA							
	3 Playground Maps							
	4 Read-To-Me							
	5 Computers for Schools							
	6 Hot Tips							
	7 Project:Connect							
	8 Smart Bears							
	9 911 Simulator							
	10 Read*Write*Now!							
	11 Other Education							
	12 Total Education (1 through 11)	0	0	0	0	0	0	0
(B)	Environmental:							
	13 Adopt-A-Mile/Park/Beach							
	14 Other Environmental							
	15 Total Environmental (13+14)	0	0	0	0	0	0	0
(C)	Life Enrichment/Health & Human Services							
	16 Habitat For Humanity							
	17 Heart Pillows							
	18 Talking Books							
	19 Hot Trikes							
	20 Easy Access							
	21 Hug-A-Bear							
	22 Beep Baseball							
	23 Other Community Service							
	24 Total Life Enr./Health & Hum. Svs. (16 → 23)	0	0	0	0	0	0	0
	25 Grand Total (12+15+24)	0	0	0	0	0	0	0

Membership Data Section:		(N)			(M)
Beginning of Year Membership (baseline)		Regular	Life	Total	YTD
(D)	Start of period membership				
(E)	New regular members signed this period & YTD				
(F)	Adjustments this period				
(G)	End of period membership (I+J+K)				

Region #:	
Chapter Name & #:	
Preparer's name and phone #:	
Date prepared:	
Quarter	First

