



Project Manager Reference Guide



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Introduction

Dear Project Manager,

Thank you for your leadership and your ambition to inspire and direct others to fulfill the mission of Denton County Master Gardener Association through your project. As this organization grows, the importance of our project managers becomes more apparent.

The purpose of this Reference Manual is to provide information about some of the tools you need to be successful.

The Denton County Master Gardener Association (DCMGA) is a volunteer program under the guidance of Texas A&M AgriLife Extension Service. As Master Gardeners, our mission is to educate and engage county residents in the implementation of research-based horticultural and environmental practices that create sustainable gardens, landscapes, and communities.

Project Manager Role and Responsibilities

The goal of a Denton County Master Gardener Association (DCMGA) project is to fulfill the mission of the association, that is, to educate and engage county residents and the DCMGA members in the implementation of research-based horticultural and environmental practices that create sustainable gardens, landscapes, and communities.

- Before initiating a new project, determine the educational benefit it will bring to the community.
- As a project manager, you are DCMGA's liaison to our Community Partners.
- A project is formally initiated by submitting the Project Initiation Form, which is routed to the DCMGA Project Administrator (Vice President), who will schedule it for you to present at an upcoming Board of Directors (BoD) meeting. All projects must be approved by the BoD and County Extension Horticultural Agent.

Once the project is approved:

- Develop detailed statements of the project's goals, scope, boundaries, and requirements.
- Develop a work plan. If possible, schedule a full season of workdays and events in advance allowing team members to plan their schedules. Provide your meeting and workday information for the Members' Calendar via the Request a Members' Calendar Update Form.
- Develop a detailed budget.
- Recruit and train DCMGA members. Enlist help from the Volunteer Coordinator. Clearly explain the goal of the project and keep the team focused on it. Clearly state each piece of work and the project schedule. Clearly explain the project budget. Consider the skills and interest of team members. Clearly define team member roles and responsibilities.
- To provide continuity for ongoing projects, recruit and train an Assistant Project Manager who can step into your position when necessary.
- For all meetings or workdays, provide a DCMGA Sign In Sheet, so that volunteers may record their attendance. Turn these sheets into the Extension Office shortly thereafter, or scan and email the sign in sheet to the Horticulture Administrative Assistant, Nikki Johnson, in the Extension Office, Nikki.Johnson@dentoncounty.com
- Provide consistency and unify the team through good communication at meetings and workdays and via email.
- For meetings or project workdays, if you are unable to attend, arrange for a substitute, such as the Assistant Project Manager, or other qualified team member to be available.
- Should there be cancellations or delays of meetings or in the workday schedule, notify the team members. Notify the Extension Office (940.349.2883) and cancel any room that may have been reserved. Provide an update to the Members' Calendar.
- Track costs as you go and anticipate upcoming expenditures. Make note of over / under runs for future budgeting. If you anticipate that your project will overrun the entire project budget, notify the Project Administrator as soon as possible. You will need to obtain Board of Directors approval prior to an overrun of \$25 up to and including \$2000. An overrun over \$2000 requires that you obtain prior approval of the general membership.

- Monitor activity and progress. Consider risks to success, and develop plans to avoid them. Step in and adjust the project plan if needed.
- Ensure your team members record their time in VMS. Request VMS reports as needed to verify.
- Report outreach statistics to the Education Director monthly.
- Keep the DCMGA Project Administrator (Vice President) as well as project team members informed of activities and progress including highlights and issues.
- Maintain documentation about your project, either electronically or in a notebook. Include tasks, schedules, goals, expenses, etc. Maintain before and after photos along with narratives. From this document, you should be able to develop an educational display of the project emphasizing DCMGA's mission, or provide information to hand your project off to the next Project Manager.
- Work with the Communications Director to publicize your project both to the community as well as DCMGA members.
- Should you have a change in budget, scope or project manager, notify the Project Administrator (Vice President) via the Project Change Request Form, who will present this to the BoD.
- Recognize your team members. Celebrate successes.
- Schedule a closing meeting if appropriate. Capture lessons learned.
- At the completion of your project, submit a Project Termination Form.
- When requested, work with the Awards Committee Chair to prepare your project results for nomination as a State/Local/International year-end award.

For ongoing projects:

- Submit a Project Continuation Form, which includes budget request for the following year.
- Participate in the annual Volunteer Opportunity Fair (February), informing membership about your project and encourage participation.
- Update your project work plan to include additional tasks, lessons learned about cost, schedule, assignments, etc. to prepare for next year.
- If needed, coordinate a smooth hand off of your project to a new project manager.

Member's Calendar

The Members' Calendar, found on DCMGA.COM under Members' Info, lists all DCMGA events, classes, meetings, and workdays. Members can check the calendar to find service and DCMGA-sponsored advanced training opportunities. If the address is listed you can access Google maps to get directions, and you can copy the calendar entry to your own Google calendar. Advanced Training events are marked with 'AT'. Volunteer Service opportunities are marked with 'VS'.

To request a calendar update for an event, or a recurring event, submit the form Request a Members' Calendar Update, providing as concise, accurate and detailed information as possible. The form will be routed to the Calendar Coordinator who will manually add your event to the Calendar.

- Make the title of your event unique and descriptive and include the name of the project if appropriate.
- If you plan to use a room at the Extension office, you must reserve the room in advance of submitting the calendar request.
- If the event will include both Volunteer Service and Advanced Training, indicate the times for each part of the event, in the Event Description or Additional Information fields.
- Requests for changes to existing calendar entries may be made by submitting the Request a Members' Calendar Update form or by sending an email to dcmga.meminfo@gmail.com.
- If a special event will replace an already posted recurring event, please make this clear in your Request, using the Additional Information field.

For best results, it is recommended to submit your Request form at least 10 days in advance of the event. In most cases, Calendar update requests are completed within 3 days. It is recommended that you check the Calendar after a few days to ensure your posting is correct.

When an event is first submitted to be entered in the Calendar, the Request a Members' Calendar Update form can also be used to provide information to the Volunteer Coordinator if you want assistance with obtaining and tracking volunteers. (See below for details.) To request volunteer assistance after the event is already on the calendar, it is recommended that you submit the form Request Volunteer Coordinator Assistance form or contact the Volunteer Coordinator directly.

Plan Your Week

Each week, generally on Friday morning, Master Gardeners and Interns will receive an email titled MG Plan Your Week, which includes AT and Volunteer Opportunities from the Members' Calendar and Websites for additional events, service and AT opportunities which are planned for the following week.

All events appearing on the Member's Calendar by end of day Wednesday will automatically be included in the Plan Your Week email sent out on that Friday.

If you have brief special announcements to be distributed to the full membership, they should be emailed to sglemke@verizon.net no later than Wednesday to be included in Friday's Plan Your Week email.

The email feature in VMS is used for the Plan Your Week email, and it has some limitations. Only one attachment, maximum size 5 MB, is permitted, therefore it is suggested that, whenever possible, a link be provided to any additional information, rather than an attachment.

The preference is to keep all announcements in Plan Your Week, however leaders and project managers may utilize the email feature in VMS if they have more extensive announcements or information on an attachment to be distributed to some or all Master Gardeners. Within VMS, select Member Roster. Select Email Members. On the next screen, make a selection under List of MG Groups, and scroll down and hit the button Email by Interest or Group. On the next screen, deselect any members as desired, complete the email and you may add one attachment if desired.

Sign Up Genius

Project managers may choose to use email to communicate with volunteers about events, if they have a list of interested members, perhaps from the Volunteer Opportunity Fair.

However, for larger events, or to reach a larger audience, an online tool administered by the Volunteer Coordinator, called Sign-Up Genius, may be a preferred way to obtain and track volunteers. The tool is used to send email notifications of an upcoming event to all members which allows them to link to the Sign-Up Genius website to sign up. Members receive reminders of events for which they have registered, and event organizers can view how many and who has registered.

Sign-Up Genius can also be used for such things as coordinating volunteers to bring refreshments to events or to manage / limit sign-ups for smaller events with limited capacity. If you wish the Volunteer Coordinator to assist in obtaining volunteers using Sign-Up Genius, indicate this in the Request for Members' Calendar Update form for a new event, or submit the Request for Volunteer Coordinator Assistance form. Fill in the number of volunteers needed, and provide as much additional information as possible (i.e. what to bring, other relevant information). If you have changes or additional information for an existing Sign-Up Genius event, contact dcmga.volunteer@gmail.com.

For best results, it is recommended to submit your Request form at least 10 days in advance of the event. In most cases, Sign-Up Genius requests are completed within 3 days.

Presentations and Publications, including Flyers, Brochures, and Posters

Several required logos and statements must be included on all presentations and publications, including flyers, brochures, and posters. For information, visit: DCMGA.com > Member Info > Logos and Public Communications Requirements. Please contact the Communications Director with any questions or concerns.

The Communications Team is available to assist you in preparation and/or review of your presentations. Please allow 2 weeks lead time for preparation and at least 3 days for review.

It is recommended that the Communications Director be included in initial project planning meetings to help set communications schedules and deadlines for large programs and other projects/activities that will involve significant public communications.

Flyers, brochures, and posters generally require 4 weeks lead time – 2 weeks for design/development and 2 weeks for printing.

Newspaper ads are rarely used due to the successful leverage of Social Media. Please allow 4 weeks lead time for newspaper ad requests to accommodate the design/development process and to meet submission deadlines.

For support on any of the above, contact the Communications Director or submit the Publicity/Publication Request Form: DCMGA.com > Member Info > Member Forms > Projects & Events > Publicity/Publication Request.

Signs

A variety of DCMGA signs and banners is available in the Resource Room and may be checked out for project events. Please allow 4 weeks lead time for new sign/banner requests – 2 weeks for design/development and 2 weeks for printing.

Social Media

DCMGA maintains several public social media accounts including Facebook, Instagram, Pinterest, and Twitter. Email project/event information to the Communications Director for posting. Please allow three days for turnaround time. Information will also be submitted to area news outlets and community calendars.

A private, internal, members-only Facebook page, DCMGA Community Information, exists for all certified Denton County Master Gardeners. Group members are added by invitation; interns are invited to join after graduation. Any group member may post to this page. If assistance is desired, contact the Communications Director.

Other internal Facebook pages exist for some intern classes and special interest groups.

Photography

Members are welcome to take pictures at DCMGA workdays and events and may share them on the internal DCMGA Community Information Facebook page. If the assistance of a Communications Team photographer is desired, please send the request to the Communications Director at least 2 weeks in advance of the event. Remain aware that while DCMGA members have signed a photography release, members of the community have not. Please use caution and wisdom in photographing/posting pictures of the general public, especially children. If you have a photograph that specifically features a member of the community (as opposed to a general shot of a large crowd), please secure a signed photo consent form: DCMGA.com > Member Info > Member Forms > Projects & Events > Photo Consent Form.

AgriLife Extension Office

The AgriLife Extension Office in the Joseph A Carroll building provides a number of services to the Denton County Master Gardener Association. The office is open from 8:00 a.m. – 5:00 p.m. Monday – Friday. The welcome desk is manned by Master Naturalist volunteers from 10:00 a.m. – 2:00 p.m. and by office staff the remainder of the day. This provides a walk-up point of contact for the DCMGA Help Desk. The office also provides a cubicle, phone, and desktop computer for use by the DCMGA Help Desk.

A number of AgriLife Extension employees work in the office, so be considerate of noise levels so as not to disturb phone calls or meetings when visiting the office.

Meeting Rooms

Meeting rooms in the Joseph A. Carroll building may be reserved by calling the AgriLife Extension office Administrative Specialist Nikki Johnson at 940-349-2883 or emailing Nikki.Johnson@dentoncounty.com.

Three meeting rooms are available for use by Master Gardeners:

- Room 115 – 80 seats, classroom style seating, maximum seating 90
- Room 507 – 20 seats, chairs at tables in a square configuration, maximum seating 30
- Room 625 – 12 seats, conference table, maximum seating 20

Please specify which room you would like to reserve, or if you do not have a room preference, please let Nikki know the number of people the room will need to accommodate. Also, indicate the date and time range for which you wish to reserve the room, including set up and clean up time if appropriate. Provide your name and contact info and the name of your meeting for posting on the hall board on the meeting day.

Room 115 is accessed via card key, so request an Extension employee to open the door. There is a lunchroom and prep area for Extension employees for some of their programs at the rear of the room, so be aware that employees may come and go there during your meeting. The cabinets and refrigerator in the employee lunchroom are for employees' use only, and may not be accessed by MGs. Anything left out on the table should be left alone. Office staff will set out items that are needed for a program, and we would not want them to show up to an event with anything missing or not enough of something. There is a small kitchen beyond the lunchroom which is available for MG use.

Keys for rooms 507 and 625 are checked out from the Extension office desk and must be returned when you vacate the room. Please be aware that there are only two keys, so if there is already someone in 625 (even if they are a MN) you may not be able to check out a key if it is needed for a meeting for 507.

The tables and chairs configurations for each room are posted in the room, and the room must be returned to its proper configuration at the end of your meeting. A vacuum cleaner and Clorox wipes are available in the Extension office if needed.

Cables to the projector and internet connection are available in rooms 115 and 507. Please do NOT unplug these cables from the wall outlets. They will not work in other plugs and can cause problems getting them reconnected and working correctly.

Lastly, if you cancel your event, be sure and cancel your room reservation by calling or emailing Nikki.

Copy and Print Requests

There is a black and white copier in the Extension Office. Master Gardeners are welcome to run small black and white copy jobs themselves, i.e. 50 copies.

For large black and white copy requests and all color copy requests, please email Nikki Johnson at Nikki.Johnson@dentoncounty.com. Large requests will be sent out of the office and require 2 weeks lead time. You will need to indicate number of copies, black and white or color, one or two sided, stapled or bound, two or three hole punched, folded, if a special paper is needed, etc. Specialty paper (such as cardstock or colored paper) is not provided. Please bring specialty paper to the AgriLife Extension office so that it may be sent off to the print shop when the print request is submitted.

Hospitality

The responsibilities of the Hospitality Committee are as follows:

- Arranges setup of the room for 10 monthly association meetings, February through November, including coffee, water, tea, and paper products
- Coordinates other refreshments for general meetings
- Purchases needed supplies (receipts to be turned in to treasurer)
- May consult with projects regarding coordination of refreshments for special events

Sign-Up Genius is used to secure volunteers (usually 4) to assist with these duties.

Sign-Up Genius is also used to coordinate members to bring in food to share.

If a project manager would like to consult with the Hospitality Committee for advice in planning refreshments for a special event, he or she should contact the Hospitality Committee chair when event planning begins, or at least a month in advance of the event. (The Hospitality Committee is not responsible for coordinating refreshments for the event, but may choose to assist.)

- Sign-Up Genius may be used to secure volunteers to handle the set up and return of equipment.
- Sign-Up Genius may be used to coordinate food.
- Equipment (coffee makers, carafes, cold beverage dispensers, serving platters, utensils) is available for checkout from the small kitchen in the back of the 6th floor Resource Room. A Hospitality Equipment Reservation form is being developed and a Sign Out / Sign In sheet is in the room.
- Paper goods are available for use. Note the amount taken on the Sign Out sheet.
- Coffee, creamer and sugar are available for use.

Resource Room

The Resource Room, located on the 6th floor of the Carroll Building, serves as the DCMGA general storage area for materials and supplies used by various programs. To ensure that an account is kept of all the resource items please follow check out procedures listed below.

The key for the Resource Room access must be checked out from the Extension Office on the 1st floor.

The DCMGA Resource Room material Check Out and In process is listed below:

- Consumables items (brochures, handouts, AgriLife Extension publications, etc) can be used by any DCMGA group. Because these are consumables, if you need a large amount of any item or if you notice something is in short supply please notify Steve Spurgin.
- SWAt Curriculum Kits and related materials – SWAt checkout procedure is posted.
- **Resource Room 1** (Rm. 623) – Resource library and a locked technology storage closet which has limited access. The clipboard for checking items in/out of this room is hanging in the room.
- **Resource Room 2** (Rm. 622) – contains banners, posters, stakes, canopies, cones, and other general material. Items in this room **MUST** be checked Out and In on the clipboard hanging in that room.
- **Resource Room 3** (Rm. 626) – Contains Interim Class supplies, Volunteer Fair supplies, Rain Water Harvesting barrels. The Check Out and In clipboard is hanging in that room.
- The shelves labeled “**DCMGA Resource Shelves**” hold bins with materials for specific DCMGA projects: Plant Sale, Veggie Show, Fall Garden Fest, Worm Composting, Plant Propagation and others. Hand trucks and carts are also located in the area. The Check Out and In clipboard for items in this area is hanging on the gray shelf.

There is a conference table with 12 chairs in the room that can be used for meetings. Maximum seating would be about 20. Contact the Extension office to reserve the room. Rm. 630 is a small meeting room which contains a small table with 4 chairs.

Please be considerate and follow the rules outline above for checking DCMGA items Out and In. The Resource Room items are valuable to DCMGA for educating and promoting our program in the community.

Contact Steve Spurgin at sspurgin@hotmail.com or 940-206-0052 if you need more information about the Resource Room.

Budgeting and Expense Tracking

- Projects must budget income, if applicable, as well as expenses.
- Project Managers must obtain prior approval if expenses will exceed your approved budget by more than \$25. Per the Bylaws Article VIII Section 2, the Board can approve up to \$2000 in additional expenses. Expenses that exceed the approved budget by more than \$2000 require full membership approval.
- Project Managers determine how they will manage their budget, i.e. some delegate some amounts to sub-teams, others approve all expenditures themselves
- Look at Treasurer's report monthly and monitor your costs
- Be aware that the Treasurer will pay expense reports, even if it puts project over budget.
- In order for the Board of Directors to accurately budget for organization expenses it is important for members to report and request reimbursement for all expenses rather paying for things themselves.

Field Trip Guidelines

Field Trip Guidelines fall under the responsibilities of the Education Director

1. DETERMINE EVENT DATE AND SITE

- Determine site and date of field trip at least 6 months in advance
- Complete and submit a Project Initiation Form
- Acquire budgetary and other necessary approvals

2. VENUE

- Reserve venue 6 months in advance, earlier if needed
- Confirm “last chance to cancel without penalty” date

3. COMMITTEE FORMATION

- 2-4 people to divide responsibilities

4. SPEAKER/ PRESENTER/ DOCENT

- Arrange 3-6 months in advance, earlier if needed

5. BUS

- Reserve bus 6 months in advance, earlier if possible
- Confirm “last chance to cancel without penalty” date
- Ensure bus includes on-board bathroom facility
- Determine availability of extra buses, if needed

Charter Bus Companies: (Echo, etc.)

Thoroughly vet potential charter companies to ensure that required DOT safety standards are met. Discuss driver qualifications with company officials.

Ask to view operator’s certificate and credentials when bus arrives on site

6. FOOD

- Determine if a caterer will be used as standard procedure for the venue or if boxed meals or a restaurant are the better options. Gather information on area restaurants, prices, menus, etc.

- Set menu with caterer at least one month in advance of event

7. PUBLICITY

- Contact DCMGA Director of Communications

- Publicize the event at DCMGA General Meetings and on DCMGA Facebook page

- Publicize event early with a “save the date” notice at meetings and on DCMGA Facebook page

- Ask for a response with an “RSVP by _____”

- First come, first serve

- Require fees paid in advance “Not Later Than _____”

- Firm on no payment, no ride

- Make sure members pay before the last date to cancel without penalty for transportation, food, etc.

8. MEMBER'S CALENDAR and PLAN YOUR WEEK

Arrange for the field trip to be included on the DCMGA members calendar
Add to PLAN YOUR WEEK two weeks in advance of program

9. SIGN -UP-GENIUS

Send out sign up genius approximately at least 3 months in advance, earlier if needed.
Include all pertinent details and a deadline for collection of money. Instruct participants to inform DCMGA on whether they will ride the bus to the venue or arrange their own transportation to the event.

10. SIGN UP SHEETS

Print at least five sign-up sheets: the first to document payment and the second to check off members as they board the bus.

11. FOLLOW UP WITH TRANSPORTATION VENDOR

Once an accurate count of participating DCMGA members has been obtained, make sure that the correct size bus has been ordered and pricing information is clear. Request emailed bus contract with reservation number. DCMGA president must sign bus contract

12. FOLLOW UP WITH CATERER AND VENUE

Contact the caterer one last time about 1 week prior to the event to touch base, answer any questions and to re-confirm # of meals needed in case the number of participants has fluctuated.

Contact the venue one last time a few days before the event to make sure that all details have been discussed and no last minute changes are necessary.

Book transportation and venue at the same time.

13. FIELD TRIP FEES FROM MEMBERS

Acquire the necessary fees from DCMGA members 2-3 weeks in advance of the trip.

14. BUDGETARY/VENDOR CHECKS

Check contract thoroughly. Ask for sample contract in advance.

Present printed bus contract to DCMGA treasurer. Complete check request, obtain DCMGA check and mail to the bus company. Call to confirm check was received. Determine amount owed to the venue and caterer. Obtain necessary checks to either mail in advance or present at time of service. Acquire budgetary and all necessary approvals during the November budget process. Budget needs to be turned in by November of the previous year by the Education Director (under programs/field trips). So ask for monies now....include although it will reimbursed to include monies in for food.

15. GRATUITY

Determine necessary gratuity for the bus driver or others and request additional cash or check

from the Treasurer. Ensure DCMGA membership knows that gratuity is included in assessed fees.

16. WATER BOTTLES AND OTHER EXTRAS

Obtain funds to purchase water bottles for each bus rider. Chill and have on hand to give each rider as they board the bus.

17. Designate at least one individual to drive a vehicle to the field trip site in case of emergencies

18. THANK YOU CARDS

Send follow-up thank you cards when appropriate.