Lieutenant Governor's Office on Aging

Outreach Protocols - 2014

The following procedures are to be used when preparing for an outreach event.

<u>Staff responsibility</u>:

- ✓ It is the responsibility of the outreach lead (the employee who commits and accepts to participate in an outreach event) to collaborate and effectively coordinate with the Outreach Coordinator on all event related functions.

- ✓ Event related functions include, but are not limited to, the request for posting of the event(s) to the SC Access Calendar in a timely manner; and the knowledge, skills, and ability to share information regarding any program or service that runs through the LGOA in order to appropriately connect constituents with suitable resources based on their needs and requests.

- ✓ If an employee is the lead on an outreach event, he or she is responsible for the completion of each of the following steps.

<u>Request event information</u>:

- ✓ Contact the event organizer or the person who has requested LGOA outreach services to receive information on:
  - Number of individuals expected to attend;
  - Target audience; and
  - Any additional information that will better help prepare for the event i.e., IT equipment, table, etc.

  NOTE: All IT requests for an outreach event must be submitted via email to Aging Helpdesk **at least** one week in advance of the event.

<u>Registration/Event Application</u>:

- ✓ Any registration/event application(s) should be filled out and approved by the team manager before it is returned to the organizer and/or contact person(s) for the event.

  NOTE: Events requiring registration fees must be approved by your Team Leader, the Deputy Director, and/or the Director.

<u>Create a folder</u>:

- ✓ For every outreach event, the creation of a file folder is recommended.
- ✓ Folders should contain any information pertaining to the event, such as:
  - Correspondences with the contact person;
  - A copy of the bag request;
  - Directions/Map to the event;
  - Presentation materials, etc.
- ✓ A "front-of-folder" document should be attached to the front of the folder. This is a helpful resource and acts as guide.
- ✓ Outreach folders/files should be stored as a reference for at least one (1) year.

  NOTE: The "front-of-folder" document will outline the information needed to properly track/add the event into OLSA. See attachment A for "front-of-folder" document.

Car(s) reservation:

- ✓ If/when a state vehicle needs to be reserved for an outreach event, the vehicle must be reserved on the "Cars" calendar in Outlook indicating the driver's name, name of car being reserved, and the departure and arrivals times from the LGOA on the event day. Additionally, if a vehicle needs to be packed for an event, the vehicle must be reserved for an appropriate amount of time the day before the event for packing purposes.
- ✓ Travel request(s) should be placed in the appropriate sleeve found in the vehicle binder. In the instance of two (2) or more traveling in the same vehicle, the travel request left in the binder should be for the person filling out the mileage log.
- ✓ Record your name, the mileage, destination, etc. legibly on the log found in the binder.
- ✓ When finished using the vehicle, cars must be cleaned out of all items and any trash. This includes unpacking left over outreach materials (Request for assistance with the unpacking of a vehicle can be submitted to the Intern Coordinator in advance; requests are at the discretion of the Intern Coordinator and are subject to approval pending the availability of intern staff. Physical limitations that have been documented with Human Resources to protect the wellbeing of an employee will be taken into consideration.)
- ✓ The vehicle's gas tank should be full upon arrival back to the LGOA.
- ✓ If any issues occur with the vehicle, please report concerns to John Roberts.

  NOTE: If a vehicle is no longer needed for a reserved time and date, please be sure to remove the reservation as soon as possible.

Bag/"Table box" request:

- ✓ All bag requests must be formally submitted to John Roberts via email **at least** one week in advance of the event. For events requiring more than 400 bags, the request should be made 3 weeks in advance.
- ✓ A bag request should include:
  - Number of bags needed
  - Name of the event
  - Date of event
  - Date the bags are needed by
- ✓ A basic event bag includes:
  - LGOA 2-sided flyer
  - SC Access brochure
  - Benefits brochure (cream colored tri-fold)
  - Jar opener
- ✓ If the event requires an exhibit table, please make note in the initial bag request.
- ✓ Prior to the event, check table boxes designated for your event to make sure all items requested/needed are accounted for. See attachment B for the official outreach checklist; items on the checklist are standard for table box supplies and outreach bags.
- ✓ If outreach bags, table boxes, or other materials need to be packed into a State or personal vehicle - indicate that time and date in the initial bag request.

  NOTE: Additional items can be added to the outreach bags if specifically requested.

Track events into OLSA:

- ✓ All outreach events should be tracked/added into OLSA once the event is completed. See OLSA Protocols.