

Toolkits Overview

Toolkits—The toolkits are a collection of materials designed to help you or your successor carry out the duties of your position, such as a "How to" guide, a seasonal calendar of tasks, an email template, or a workflow document. These documents are updated annually with the most recent (top) document listed first. When updating toolkit documentation, please include all relevant tools from past toolkits, even if you didn't personally use them. Do not carry forward outdated items.

On the following page is a template you can use to create your template. Consider including the following items:

- Organization Name and Current Leader/Chair/Facilitator
- Number/frequency of meetings and/or organizational activities
- Dates/time frames for meetings; key items to put on calendar; seasonal activities
- Workflow documents on specific organizational tasks/responsibilities
- How are new members solicited? What is helpful in orienting them to the area?
- What are typical communication activities used to publicize events internally or to UMRA overall? (Sample or typical messages sent)
- Templates for other regularly needed emails and communications
- Tips on maintaining membership data base/information
- Roster of current members
- members

UMRA Toolkit

Date: [date]

To: _____, Organizational Continuity Committee Chair (OCC)

From: [Name, Title in UMRA]

Re: [Year, Organization name] Toolkit

[body of toolkit here]