BLOOD & MONEY

SERVICE LEARNING WORKBOOK

Service Learning & Project Management Principles

for Non-Profit Volunteers

THE
JACKSON COPELAND
FOUNDATION

Note: We distribute this book free of charge, but donors literally fuel our foundation's mission to end leukemia while supporting patients and families. Please consider helping us offset our costs for producing this workbook by making a tax deductible donation at jacksoncopeland.org!

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Section I: INTRODUCTION & OVERVIEW

The Framework:

This workbook was written for high school students who need volunteer hours and/or a service learning project, and guides student volunteers through a **6-Module System** for a service learning or volunteer project that can theoretically be completed in *as little as* six weeks (though most projects take much longer; this is intended to be a personalized project with you, your mentor, and your team setting the timeline).

As the father of two boys (one who was awarded a Florida Bright Futures Scholarship, and one who *barely* missed it), I know how difficult finding meaningful volunteer opportunities can be for high school students. This workbook was designed to help you create your own relevant, and *impactful* volunteer or service learning project.

The workbook is divided into two sections: Section 1 outlines the 6 modules and introduces key management principles, while Section 2 provides additional resources in more in-depth "chapters" for students who need to dive deeper into these concepts.

The "Blood & Money" Mission

You *can* make a difference. Whether you are in Florida, Maryland, DC, or beyond, your community needs you. This program is designed to help you meet your volunteer service hour requirements (75-100 hours for Florida Bright Futures, 75 hours for Maryland, or 100 hours for DC) not just by "putting in time," but by building real-world skills and making a significant impact in the lives of others.

Your Goal: To lead a project from start to finish, earning your hours while learning Project Management, Business Strategy, and Non-Profit Leadership, while helping us end leukemia and support patients and families.

The Challenge

You will build a team and design a campaign to deliver one (or a combination) of the following:

- **Blood Donations:** Increased blood or platelet donations at your local blood bank.
- **Marrow Donor Registrations:** Sign up new members for the National Marrow Donor Program.
- **Money:** Fundraising to support the JCF mission.

Note: While these objectives support our foundation's mission, in truth, the principles in this book can be used for any service learning project, to support just about any worthy cause!

MODULE 1: The Foundation

Focus: Teambuilding, Strategy, & Market Fit

Concept 1: Organizational Structure

- **Span of Control:** We limit teams to 2-5 members. In management, "span of control" refers to the number of subordinates a supervisor can effectively manage. Small teams allow for agility and clear communication.
- **Forming, Storming, Norming, Performing:** Every new team goes through these stages. You will start by "Forming" (being polite) and "Storming" (figuring out conflicts). Your goal is to reach "Performing" quickly.

Concept 2: Strategic Analysis

- **SWOT Analysis:** Before you pick a project, analyze your environment:
    - **Strengths:** What are you good at? (e.g., social media, public speaking).
    - **Weaknesses:** What are you missing? (e.g., no car, no budget).
    - **Opportunities:** Is there a school assembly coming up? A town fair?
    - **Threats:** Is another club doing a fundraiser the same week?
- **Market Analysis:** Who is your "customer"? If you are doing a blood drive, your target isn't "everyone"—it's healthy individuals over 16. If fundraising, is your target students (small donations) or local businesses (sponsorships)?

Activity: The "SMART" Pitch

Develop your project goal using the SMART framework:

- **S**pecific (e.g., "Host a drive," not "Help people")
- **M**easurable (e.g., "Recruit 20 donors")
- **A**chievable (Is this realistic given your time?)
- **R**elevant (Does it fit the JCF Blood & Money mission?)
- **T**ime-bound (When is the deadline?)

Module 1 Meeting Agenda & Deliverables

- **Agenda:**
    1. Assign Roles (Project Lead, Finance, Marketing, Logistics).
    2. Identify a Mentor (Teacher, Parent, Community Leader).
    3. Conduct SWOT Analysis.
    4. Draft SMART Goal.

- **AI Tip:** *Use your AI assistant to generate a "Team Charter" template or ask it "What are common risks for a high school car wash fundraiser?" to help with your SWOT.*
- **Deliverable: Org Chart & Goal Setting Worksheet** (Signed by Mentor).

MODULE 2: The Blueprint

Focus: Logistics & Risk Management

Concept 1: The 5 Ws (Logistics)

A vision without a plan is just a dream. You need to answer:

- **Who** is responsible for each task?
- **What** resources are needed (tables, power cords, permits)?
- **Where** will the event happen (and do you have permission)?
- **When** is the event (and the setup/cleanup time)?
- **Why** would people attend?

Concept 2: Contingency Planning

Project Managers live by "Murphy's Law": *Anything that can go wrong, will go wrong.*

- **Risk Matrix:** List potential problems (Rain, Sick Team Member, Low Turnout). Rate them by "Likelihood" and "Impact."
- **Mitigation:** For every high-risk item, have a Plan B. (e.g., "If it rains, we move to the gym.")

Module 2 Meeting Agenda & Deliverables

- **Agenda:**
    1. Review Goal from Module 1.
    2. Brainstorm "What could go wrong?" (Contingency Planning).
    3. Map out the Timeline (Backwards planning from Event Day).
- **AI Tip:** *Ask your AI: "Create a checklist of logistical requirements for hosting a blood drive at a community center."*
- **Deliverable: Draft Project Proposal** (Includes Logistics Plan, Timeline, and Contingency Plan).

MODULE 3: The Mechanics

Focus: Finance, Marketing, & Tools

Concept 1: The Marketing Mix (4 Ps)

How will you get people to show up?

- **Product:** What are you offering? (The feeling of saving a life? A cookie? A fun event?)
- **Price:** What does it cost them? (Money? 1 hour of time? A pinch of a needle?)
- **Place:** Where do they find you?
- **Promotion:** Instagram, Flyers, Announcements, Local News.

Concept 2: Financial Literacy & Accountability

- **Budgeting:** List every potential cost. Even if items are donated, list their value.
- **Accounting:** If you touch money, you need transparency. **Rule #1:** Never mix project money with personal money. Use a tracking log.

Concept 3: Project Management Tools

Move beyond group chats. We encourage using free professional tools:

- **Trello/Asana:** For task tracking (Kanban boards).
- **Google Sheets/Excel:** For budget and hours tracking.
- **Slack/Discord:** For organized team communication.

Module 3 Meeting Agenda & Deliverables

- **Agenda:**
    1. Build the Budget (Income vs. Expenses).
    2. Draft the Marketing Plan (Social media schedule, flyer design).
    3. Select your PM Tool (e.g., Set up the Trello board).
- **AI Tip:** *Ask your AI: "Write a press release for a local student-led marrow registry drive" or "Create a 30-day social media content calendar for a charity fundraiser."*
- **Deliverable: Marketing Plan & Budget Spreadsheet.**

MODULE 4: The Pitch

Focus: Professional Communication & Approval

Concept: Stakeholder Management

You need approval to proceed. In business, you must convince "Stakeholders" (people who have a stake in your success) that your plan is solid. Your Stakeholders are:

1. **JCF Foundation:** (Are you representing the brand correctly?)
2. **Your School/Venue:** (Is it safe? Legal?)
3. **Your Mentor:** (Is it educational?)

Activity: The Formal Proposal

Compile the work from Modules 1-3 into a single professional document or slide deck. You will present this to your Mentor (and optionally JCF leadership) for a "Go/No-Go" decision.

Module 4 Meeting Agenda & Deliverables

- **Agenda:**
    1. Rehearse the presentation.
    2. Review the "Grading Rubric" (See intro) to ensure projected goals meet the standard.
    3. Q&A practice: Ask each other tough questions about the plan.
- **AI Tip:** *Paste your proposal text into an AI and ask: "Act as a strict school principal. Review this proposal and tell me three reasons why you might reject it, so I can fix them."*
- **Deliverable: Signed "Green Light" Approval Form.**

MODULE 5: Execution

Focus: Operations & Agility

Concept: Monitoring & Controlling

The plan is done. Now you execute.

- **KPIs (Key Performance Indicators):** Are you on track? (e.g., "We wanted 10 signups by Wednesday, we only have 2. What do we change?")
- **Agility:** If something isn't working, pivot. Don't wait until the end to fix it.

Activity: The Campaign

This module helps you track your work during the actual event or fundraising period. This can last one day or several weeks.

Module 5 Meeting Agenda & Deliverables

- **Agenda (Weekly Stand-up):**
    1. **What did I do yesterday?**
    2. **What will I do today?**
    3. **Blocks:** What is stopping me?
- **AI Tip:** *Use AI to draft "Thank You" emails to donors or to create rapid updates for social media during the event.*
- **Deliverable: Weekly Progress Logs & Photo Documentation** (Take pictures of *everything*!).

MODULE 6: The Legacy

Focus: Review, Reflection, & Demobilization

Concept 1: Demobilization

A project isn't over until the site is clean.

- Return borrowed equipment.
- Send Thank You notes (crucial for networking).
- Finalize accounting and transfer funds to JCF.

Concept 2: After Action Review (AAR)

Used by the military and top companies. Answer these four questions honestly:

1. What was *supposed* to happen?
2. What *actually* happened?
3. Why was there a difference?
4. What would we do differently next time?

Activity: The Reflection

Most school districts (especially Maryland) require a written reflection for service hours. This connects your actions to your personal growth.

- *Prompt:* "How did managing this project change my view of leadership or community service?"

Module 6 Meeting Agenda & Deliverables

- **Agenda:**
    1. Conduct the AAR discussion.
    2. Calculate final "Blood & Money" Score.
    3. Sign off on final hours logs.
- **AI Tip:** *Input your AAR notes into AI and ask it to "Summarize these notes into a 'Best Practices' guide for future students."*
- **Deliverable: Final Report, AAR Summary, & Reflection Essay.**

Section II: Deep Dive

The "Why" Behind the Work

Welcome to the real world!

Many volunteer projects just ask you to “show up”, do a task, and go home. This program is different. The JCF Blood & Money initiative is not just about volunteering; it is about *leadership*. You are here to solve a critical problem: the shortage of life-saving blood donations, marrow donors, and the funds required to fight blood cancer.

But you are also here to *learn*. The skills you will practice in this workbook—Strategic Analysis, Risk Management, Financial Forecasting, and Stakeholder Engagement—are the exact same skills used by CEOs, Non-Profit Directors, and Military Leaders around the world!

How to Use This Book

This is not a textbook to be *read*; it is a manual to be *used*.

- **The Deep Dive: Each chapter begins with the *theory* behind the task. Read this to understand the "management science" of what you are doing.**
- **The Mission: This is your actual assignment for the JCF program.**
- **The AI Assistant: In the modern workforce, we use tools. Look for the "AI Prompts" in each chapter to help you work faster and smarter using Artificial Intelligence.**

CHAPTER 1: THE FOUNDATION

Building the Team & Setting the Strategy

Before you can execute, you must organize. In the business world, "structure drives behavior." If you build a team without clear roles or a strategy without clear analysis, you will fail. Module 1 is about laying the concrete foundation for your project.

Deep Dive Concept A: Team Dynamics (The Tuckman Model)

You may think you can just grab a few friends and start working. However, decades of management research show that high-performing teams don't just "happen." In 1965, psychologist Bruce Tuckman identified the four inevitable stages of team development. Knowing where you are will help you stop fighting and start working.

1. **Forming: The "polite" stage. You are just meeting, assigning roles, and everyone is on their best behavior. Productivity is low because you are still figuring things out.**
2. **Storming: The "conflict" stage. This is natural! People might disagree on the project idea or who should be the leader. *Do not panic.* Great teams argue about *ideas*, not *people*.**
3. **Norming: The "groove" stage. You resolve your arguments, accept your roles, and start helping each other.**
4. **Performing: The "flow" stage. You know what to do without being asked. This is where the magic happens.**

Management Lesson: *Span of Control.* You will notice we recommend teams of 3-5 students. In management theory, "Span of Control" refers to the number of people one manager can effectively supervise. Research shows that once a team passes 6-7 people, communication breaks down and "social loafing" (people hiding in the crowd) begins. Keep your team small and agile.

Deep Dive Concept B: Strategic Analysis (SWOT)

A "strategy" is simply a plan to achieve a goal under uncertain conditions. To build a strategy, you must understand your environment using a SWOT Analysis.

- **Strengths (Internal): What do you have? (e.g., "Our team member's mom owns a print shop," "We have 5,000 TikTok followers," "We have a car.")**
- **Weaknesses (Internal): What are you missing? (e.g., "We have zero budget," "We are all in sports and have no time after 3 PM.")**
- **Opportunities (External): What is happening in the world that helps you? (e.g., "It is Childhood Cancer Awareness Month," "The school has a football game next Friday.")**
- **Threats (External): What could stop you? (e.g., "SATs are next week," "Another club is selling chocolate bars on the same day.")**

Deep Dive Concept C: Goal Setting (SMART)

"We want to help JCF" is a wish, not a goal. In project management, we use SMART criteria to define success.

- **S - Specific: "Host a Blood Drive" (Not "Help people").**
- **M - Measurable: "Collect 30 units of blood" (Not "A lot of blood").**
- **A - Achievable: Is 30 units possible in a 4-hour drive? (Yes. 300 units might not be).**
- **R - Relevant: Does this actually help the JCF mission?**
- **T - Time-Bound: "By November 15th."**

Chapter 1 Resources & Further Reading

- **Tuckman's Stages of Group Development: West Chester University Guide – A breakdown of the behaviors and leadership needs at each stage.**
- **SWOT Analysis for Non-Profits: WildApricot Guide – Specific questions to ask when analyzing a charitable cause.**
- **SMART Goals in Project Management: Asana Guide – How to write goals that track progress.**

CHAPTER 2: THE BLUEPRINT

Logistics, Operations, & Risk Management

A vision without a plan is just a hallucination. Chapter 2 introduces Operations Management—the art of actually getting things done. You will move from "What are we doing?" to "How exactly will we survive if it rains?"

Deep Dive Concept A: The 5 Ws of Logistics

Logistics is the military science of moving resources to the right place at the right time. For your project, you must answer the 5 Ws in excruciating detail.

- **Who: Not just "the team." *Who* specifically is bringing the extension cord? *Who* is unlocking the door?**
- **What: The "Bill of Materials." List every single item you need, from tables and chairs to pens and tape.**
- **Where: A specific location. "The Cafeteria" is not specific enough. "The North-East Corner of the Cafeteria near the Power Outlet" is logistics.**
- **When: The "Run of Show." A minute-by-minute schedule. Setup begins at 7:00 AM. Event starts at 8:00 AM.**
- **Why: The incentive. Why does the donor show up? (To save a life? To get a cookie? To impress a date?)**

Deep Dive Concept B: Risk Management (The Matrix)

Professional Project Managers (PMPs) spend 50% of their time worrying. They use a Risk Matrix to predict the future. A Risk Matrix plots potential problems on two axes: Likelihood (How likely is it to happen?) and Severity (How bad is it if it does?).

The 4 Risk Strategies:

1. **Avoid: The risk is too high. Change the plan. (e.g., Risk: "Fire Jugglers might burn the school." Strategy: Don't hire fire jugglers.)**
2. **Mitigate: Reduce the impact. (e.g., Risk: "Rain." Strategy: Move it indoors.)**
3. **Transfer: Make it someone else's problem. (e.g., Risk: "Injury." Strategy: Make sure the venue has insurance.)**
4. **Accept: It's a small risk; we will live with it. (e.g., Risk: "We run out of napkins.")**

The "Murphy's Law" Exercise

In this module, your team must sit down and brainstorm everything that could go wrong. If you are hosting an outdoor car wash, what if it rains? What if the hose breaks? What if no cars show up? If you have a plan for disaster, you cannot be defeated by it.

Chapter 2 Resources & Further Reading

- **The Risk Assessment Matrix: Atlassian Guide – A guide to plotting likelihood vs. severity.**
- **Calculating Risk Scores: Vector Solutions Guide – How to use math to prioritize which risks to fix first.**

CHAPTER 3: THE MECHANICS

Marketing, Finance, & Operational Tools

In Modules 1 and 2, you built the foundation and the blueprint. Now, you must build the machine. Chapter 3 covers the "hard skills" of business: convincing people to buy what you are selling (Marketing), managing the resources you have (Finance), and keeping track of it all (Project Controls).

Deep Dive Concept A: The Marketing Mix (The 4 Ps)

You might think "Marketing" is just posting on Instagram. It is not. Marketing is the psychological engineering of a transaction. In the 1960s, E. Jerome McCarthy proposed the 4 Ps of Marketing. For a non-profit project like "Blood & Money," you must adapt these slightly.

1. **Product: What are you actually "selling"?**
    - ***Commercial view:* A shoe or a phone.**
    - ***Non-Profit view:* You are selling a *feeling*. You are selling the feeling of being a hero, of saving a life, or of belonging to a community. If you just ask for "blood," people get scared. If you offer "the chance to save a cancer patient," they get excited.**
2. **Price: What does it cost the customer?**
    - ***Commercial view:* Money ($20).**
    - ***Non-Profit view:* The "price" is often *fear* or *inconvenience*. Giving blood "costs" a pinch of a needle and 45 minutes of time. Your marketing must prove that the *Product* (saving a life) is worth more than the *Price* (a temporary pinch).**
3. **Place: Where does the transaction happen?**
    - **If your drive is in a dark corner of the gym, the "Place" is bad. If it is in the main lobby with music and balloons, the "Place" is inviting.**
4. **Promotion: How do they hear about it?**

    - **This is your flyers, announcements, and social media. But remember: Promotion only works if the Product, Price, and Place are right.**

Deep Dive Concept B: Financial Intelligence

In the real world, if you run out of money, the project dies. Even if your budget is zero, you must track "In-Kind Donations" (goods given for free).

- **Zero-Based Budgeting: This is a corporate standard. Start with $0. List every single expense you *need* (Pizza for volunteers? Balloons? Markers?). Then, figure out exactly where the revenue covers it (Sponsorship? Bake sale?). Every dollar spent must be justified.**
- **The "Audit Trail": Never mix project funds with personal money. If you collect cash donations, count it with two people present and sign a log. This protects you from accusations of theft. Transparency is trust.**

Deep Dive Concept C: The Toolkit (Project Controls)

Stop using group chats to manage projects. Group chats are for *talking*; Project Management (PM) tools are for *tracking*.

- **Kanban Boards (Trello): Imagine a whiteboard with sticky notes. You have three columns: "To Do," "Doing," and "Done." You write a task on a note ("Call Blood Donation Center") and move it across the board. This visualizes your workflow.**
- **Gantt Charts: A visual timeline. If the blood drive is on Friday, and you need 3 days to print flyers, the "Print Flyers" bar must end by Tuesday.**

The Mission: Build Your Engine

For Module 3, your team must move from "ideas" to "spreadsheets." You will create a Marketing Plan that addresses the 4 Ps and a Line-Item Budget that accounts for every penny.

AI Assistant Prompts for Module 3

- ***Marketing:*** **"Act as a marketing consultant. I am hosting a blood drive at a high school where students are afraid of needles. Give me 5 slogans that focus on the 'Hero' aspect to overcome the 'Fear' price."**
- ***Finance:*** **"Create a table for a 'Zero-Based Budget' for a student fundraiser. Include columns for Item, Estimated Cost, Actual Cost, and Funding Source."**
- ***Social Media:*** **"Write a 5-day countdown plan for Instagram Stories to promote our event, including poll ideas to increase engagement."**

Chapter 3 Resources & Further Reading

- **The 4 Ps for Non-Profits: Red Rooster Group Guide – How to apply brand equity to causes.**
- **Student Organization Budgeting: University of Houston Guide – A straightforward PDF on managing student club money.**
- **Trello for Education: Trello Education Templates – Pre-made boards for group projects and student planning.**

CHAPTER 4: THE PITCH

Stakeholder Management & Professional Proposals

You have a plan. Now you need permission. In business, you cannot just "do" things; you need "buy-in" from the people who control the resources. Module 4 is about Stakeholder Management—identifying who holds the keys to your success and convincing them to unlock the door.

Deep Dive Concept A: Stakeholder Analysis (The Power/Interest Grid)

A "Stakeholder" is anyone who can affect or is affected by your project. Not all stakeholders are equal. We map them on a Power/Interest Grid:

1. **High Power / High Interest (Key Players): These people can cancel your project, but they also care about it. *Example: Your Principal or the JCF Program Director.* Strategy: Manage Closely. Meet with them face-to-face.**
2. **High Power / Low Interest (Context Setters): They can cancel you, but they don't really care what you do as long as you don't cause trouble. *Example: The School Custodian or Security Guard.* Strategy: Keep Satisfied. Don't annoy them.**
3. **Low Power / High Interest (Defenders): They love your project but have no authority. *Example: Your best friend or a student volunteer.* Strategy: Keep Informed. Use their energy to help you.**
4. **Low Power / Low Interest (Crowd): They don't know you exist. Strategy: Monitor.**

Deep Dive Concept B: The "Pyramid Principle"

When you write your proposal, do not write a mystery novel. Do not save the best for last. In business communication (specifically the McKinsey "Pyramid Principle"), you start with the answer.

- **Bad Pitch: "We thought about lots of things, and we looked at the calendar, and we checked the weather..." (Boring!)**
- **Good Pitch: "We request approval to host a Blood Drive on Oct 14th. This will result in 30 saved lives and cost the school $0. Here is how we will do it..."**

The Mission: The "Green Light" Proposal

You will compile your work from Modules 1, 2, and 3 into a formal Project Proposal. This is a document (or slide deck) that you will present to your Mentor. It must look professional. No typos. Clear headings. The Proposal Structure:

1. **Executive Summary: The whole plan in 1 page.**
2. **The Goal (SMART): What will you achieve?**
3. **The Plan: Logistics, Marketing, and Finance.**
4. **Risk Analysis: "We know X might happen, and here is our plan B."**
5. **The Ask: "We need your signature on this form."**

AI Assistant Prompts for Module 4

- ***Stakeholder Analysis:* "I am a student planning an event. Who are the hidden stakeholders I might forget? Consider people like janitors, parents, or local neighbors."**
- ***Proposal Polish:* "I have pasted my draft proposal below. Please review it for 'Executive Presence'—make the tone more professional, concise, and persuasive."**
- ***Objection Handling:* "Act as a skeptical School Principal. I am proposing a [Project Name]. Ask me 3 hard questions about safety and liability so I can prepare my answers."**

Chapter 4 Resources & Further Reading

- **Stakeholder Analysis Matrix: Asana Guide – A step-by-step guide to mapping your stakeholders.**
- **Writing a Business Proposal: HubSpot Guide – Templates and examples of winning proposals.**
- **The Executive Summary: Venngage Guide – How to write the most important page of your document.**

CHAPTER 5: EXECUTION

Agile Management & The Art of the Pivot

The planning is done. The event is today. Now, everything changes. No plan survives first contact with reality. Chapter 5 is not about "following the plan"—it is about **Monitoring and Controlling** the chaos.

Deep Dive Concept A: Agile Project Management (The Pivot)

Traditional management (Waterfall) says: "Stick to the plan." Agile management says: "Respond to change." Your team needs to operate in "Sprints"—short bursts of work followed by a quick check-in.

- **The Daily Stand-up:** A 5-minute meeting where you answer three questions:
    1. What did I do yesterday?
    2. What will I do today?
    3. **Blocks:** What is stopping me? (e.g., "I can't print the flyers because the library is closed.")
- **The Pivot:** If you planned to sell chocolate bars outside, but it is raining, do not "stick to the plan" and get wet. *Pivot.* Sell hot cocoa inside. This is not "quitting"; it is "agility."

Deep Dive Concept B: Key Performance Indicators (KPIs)

How do you know if you are winning? You need a scoreboard. In business, these are called **KPIs**.

- **Lagging Indicators:** These tell you what *already* happened. (e.g., "We raised $50.") It is too late to fix these.
- **Leading Indicators:** These predict the future. (e.g., "We handed out 500 flyers.") If you handed out 0 flyers, your *future* fundraising will be $0. **Your Mission:** Track one "Leading Indicator" every day. If the number is low, fix it *before* the event fails.

The Mission: The "War Room"

During your campaign (whether it is 1 day or 2 weeks), your team must keep a **Campaign Log**.

- **Morning Check:** Review your Leading Indicators.

- **Mid-Day Check:** Execute the "Daily Stand-up."
- **Evening Check:** Update the Budget Tracker (Every receipt must be logged *immediately*).

AI Assistant Prompts for Module 5

- *Crisis Management:* "We just realized we forgot [Item X] and the event starts in 1 hour. Give me 3 creative workarounds using common household items."
- *Social Media Agility:* "Our fundraising post isn't getting likes. Rewrite this caption to be more urgent and engaging using the 'FOMO' (Fear Of Missing Out) technique."
- *Team Conflict:* "My team member is not replying to texts and it is the day of the event. Write a text message that is professional but firm, asking for an update."

Chapter 5 Resources & Further Reading

- **Agile for Students:** Agilemania Guide – How to use "Sprints" and "Stand-ups" in non-software projects.
- **KPIs Explained:** Simplilearn Guide – The difference between "busy" and "productive."

CHAPTER 6: THE LEGACY

Demobilization, Reflection, & The AAR

The event is over. You are tired. But you are not done. In the professional world, the project does not end when the guests leave; it ends when the "Lessons Learned" are filed.

Deep Dive Concept A: The After Action Review (AAR)

The **AAR** was developed by the U.S. Army to learn from combat without assigning blame. It is now used by companies like Google and Amazon. **The 4 Rules of AAR:**

1. **No Blame:** This is not about who messed up. It is about *what* messed up.
2. **Total Honesty:** You cannot fix a problem you refuse to admit.
3. **Focus on Systems:** Don't say "Steve was lazy." Say "We didn't have a system to check Steve's work."
4. **The 4 Questions:**
    - *What was supposed to happen?* (The Plan)
    - *What actually happened?* (The Reality)
    - *Why was there a difference?* (The Root Cause)
    - *What do we do next time?* (The Legacy)

Deep Dive Concept B: Demobilization (Closing the Loop)

A "zombie project" is one that never officially dies—it just keeps eating resources. You must "Close Out."

- **Financial Reconciliation:** Every penny must be accounted for. If you have $5 left, does it go to JCF? To the school? Do not keep it.
- **Asset Release:** Return the borrowed tables. Clean the room. Thank the janitor.
- **Stakeholder Closure:** Send a formal email to your Mentor and Principal: "Mission Complete. Here are the results."

Deep Dive Concept C: Reflection (The "So What?")

Service Learning is meaningless without reflection. This is the difference between "community service" (punishment) and "service learning" (education).

- **The "What, So What, Now What" Model:**

    - **What?** I organized a blood drive.
    - **So What?** I learned that marketing to teenagers is hard because they fear pain.
    - **Now What?** In my future career in business, I will remember that customers buy "feelings," not just "products."

The Mission: The Final Report

Your final deliverable is not just the money/blood collected. It is a **Portfolio** containing:

1. **The Executive Summary of Results:** (We raised $X, we collected Y units).
2. **The AAR Summary:** (Three things to do better next year).
3. **The Personal Reflection:** (How did I grow as a leader?).

AI Assistant Prompts for Module 6

- *AAR Analysis:* "Here is a list of things that went wrong at our event. Summarize them into 3 'Root Causes' so we don't blame individuals."
- *Thank You Notes:* "Write a professional Thank You email to a local business that donated pizza, explaining specifically how their donation helped us reach our goal."
- *Resume Builder:* "I managed the budget for a student blood drive. Write a bullet point for my college resume that highlights 'Financial Stewardship' and 'Project Management'."

Chapter 6 Resources & Further Reading

- **The After Action Review Guide:** WildApricot AAR Template – A guide to running a "blameless" post-mortem.
- **Project Closure Checklist:** Numeric Non-Profit Checklist – A list of financial and operational steps to officially close a project.
- **Service Learning Reflection:** UTK Reflection Guide – Deep questions to help you understand your growth.

APPENDIX: THE TOOLKIT

Templates, Scripts, & Cheat Sheets for the Student Leader

This section contains the "weapons" you need to fight the battle against disorganization. Do not reinvent the wheel. Use these tools to save time and look like a pro!

- **The One-Page Project Manager:** A template for your "War Room" wall.
- **The 30-Second Elevator Pitch:** A script for asking for money/donations.
- **The "Email to Busy Adults" Template:** How to write so adults will actually read it (Subject Line strategies, BLUF - Bottom Line Up Front).

TOOL 1: The One-Page Project Manager (OPPM)

Stop writing 10-page plans nobody reads. This single sheet hangs on your "War Room" wall.

PROJECT NAME: *[Insert Name]*	***LEADER:*** *[Name]*	***DATE:*** *[Date]*
THE GOAL (SMART):	*Example: Collect 30 units of blood by Nov 15th.*	
THE WHY:	*Example: To save lives and honor [Name].*	

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The Timeline (Gantt View)

Mark an "X" in the week the task must be DONE.

Task Description	***Owner***	***Week 1***	***Week 2***	***Week 3***	***Week 4***	***Event Day***
1. Secure Venue/Permits	*[Name]*	***X***				
2. Design & Print Flyers	*[Name]*		***X***			
3. Social Media Launch	*[Name]*		***X***	***X***	***X***	***X***
4. Recruit Volunteers	*[Name]*			***X***		
5. Confirm Logistics (Food/Tables)	*[Name]*				***X***	
6. ***EXECUTION DAY***	***ALL***					***X***

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The Risk List (Top 3 Worries)

1. ***Risk:*** *[e.g., Rain] →* ***Fix:*** *[e.g., Reserve Gym]*
2. ***Risk:*** *[e.g., Low Signups] →* ***Fix:*** *[e.g., Ask Principal for PA announcement]*
3. ***Risk:*** *[e.g., No Food] →* ***Fix:*** *[e.g., Ask 3 pizza places, not just 1]*

TOOL 2: The 30-Second Elevator Pitch

You are in an elevator with a rich donor or a skeptical principal. You have 30 seconds to get a "Yes." Memorize this script.

The Hook (The Problem): *"Did you know that every 2 seconds, someone in the U.S. needs blood, but only 3% of people donate?"*

The Solution (Your Project): *"My team is fixing that. We are hosting the [Name of Drive] on [Date] to collect [Goal] units of life-saving blood right here at school."*

The Ask (What you need): *"We don't need money. We just need [Specific Ask: 'permission to use the gym', 'you to sign up', 'a donation of 5 pizzas']. Can we count on your support to save a life today?"*

TOOL 3: The "Email to Busy Adults" (BLUF Method)

Adults don't read long emails. They scan. Use the Military method: ***B.L.U.F. (Bottom Line Up Front).***

Subject: *[ACTION REQUIRED] Approval Needed for JCF Blood Drive – [Date]*

Dear [Principal/Mentor Name],

BLUF (The Bottom Line): *We request your signature on the attached venue form by* ***Friday, Oct 5th*** *so we can secure the gym for our charity blood drive.*

The Context:

- ***Who:*** *The Student Council & JCF Blood & Money Program.*
- ***What:*** *A 4-hour blood drive to save ~90 lives.*
- ***When:*** *[Date of Event].*
- ***Cost to School:*** *$0. (All costs covered by sponsors).*

Safety & Logistics:

- *We have already coordinated with the Nurse.*
- *The Red Cross is providing insurance.*
- *Cleanup will be handled by student volunteers.*

Next Steps: *Please sign the attached PDF and reply with "Approved." If you have questions, I can stop by your office at [Time].*

Respectfully,

[Your Name] *Project Lead, JCF Blood & Money Team*

TOOL 4: The "After Action" Scorecard

Fill this out immediately after your event ends.

1. ***Final Result:*** _____ *(Units Collected / Money Raised)*
2. ***Goal vs. Actual:*** *We were [Over/Under] our goal by* _____.
3. ***The "Ouch" Moment:*** *The biggest problem we didn't expect was:* _____.
4. ***The "Win" Moment:*** *The best thing our team did was:* _____.
5. ***Legacy Note:*** *If next year's students read this, our one piece of advice is:* _____.

ABOUT THE AUTHOR

***Jeff Copeland** is a real estate broker, general contractor, entrepreneur, and non-profit executive based in St. Petersburg, Florida with the "hard skills" of a CEO and the "heart" of a philanthropist.*

Jeff is a 22-year military veteran and retired from the U.S. Coast Guard Reserve as a Lieutenant Commander in 2016. Following almost a decade in county government (Emergency Management) and higher education (Risk Management), he is now the Broker/Owner of Copeland Morgan LLC, a real estate brokerage managing over $100 million in investment assets, as well as the owner of Copeland Construction & Restoration LLC, a certified residential contracting firm.

With a background that spans over 30 years in federal, state, and local government and millions of dollars in property transactions and renovations, Jeff understands that successful projects—whether building a house or building a movement—require rigorous planning, financial intelligence, and execution.

*Beyond the boardroom, Jeff is the Founder and Executive Director of the **Jackson Copeland Foundation**, a charity dedicated to fighting blood cancer and supporting leukemia patients and families. He created the "Blood & Money" program to bridge the gap between student volunteerism and real-world leadership, empowering young people to run service projects with the sophistication of a startup.*

Jeff holds a Master's degree in Public Administration and a Bachelor's in Management and International Business. He is also the host of the Tampa Bay Real Estate Investor's Podcast and has been featured on numerous real estate blogs and podcasts.

When he isn't managing job sites or analyzing spreadsheets, Jeff can be found mentoring the next generation of leaders to help them change the world, one project at a time!

This e-book is dedicated to my son, Jackson Rees Copeland (2001-2024). Jackson joined the U.S. Navy Reserve as an Intelligence Specialist after graduating from Northeast High School in St Petersburg, Florida in 2019. He was also attending classes at St Petersburg College when, seemingly out of the blue, he was diagnosed with an aggressive form of acute myeloid leukemia in March of 2022. His bravery, maturity, resilience, indomitable spirit, and sense of humor in the face of this terrible disease remains an inspiration to his family and friends. Jackson passed away peacefully at home after a grueling two year battle on May 2nd, 2024. He may be out of our sight, but he will never be out of our hearts. Learn more at jacksoncopeland.org.

Jeff Copeland