

First roster checklist

Prepare, review and publish one church volunteer schedule

Parish / church: _____ Service/date range: _____ Coordinator: _____

☐ **List services and dates.** Check service times, recurrence and the workspace timezone.

☐ **Enter ministry requirements.** Set the number of volunteers needed for each ministry at each service.

☐ **Invite volunteers.** Confirm access, contact details and the ministries each person is qualified to serve.

☐ **Review availability.** Ask for event preferences and unavailable dates before generating the schedule.

☐ **Check family arrangements.** Where needed, configure Event Groups and review the resulting family coordination.

☐ **Generate and inspect the roster.** Check gaps, repeated assignments and any warnings. A generated roster still needs a person to review it.

☐ **Resolve or record gaps.** Make suitable manual adjustments and agree who will follow up on unfilled places.

☐ **Review communication settings.** Check preferences, SMS consent and the plan's organization-wide allowance. Confirm what will be sent when publishing.

☐ **Publish the reviewed roster.** Check the published volunteer view and explain who to contact if plans change.

☐ **Name the next review owner.** Agree when the next schedule will be prepared and who maintains volunteer details.

Next review date: _____ Responsible person: _____