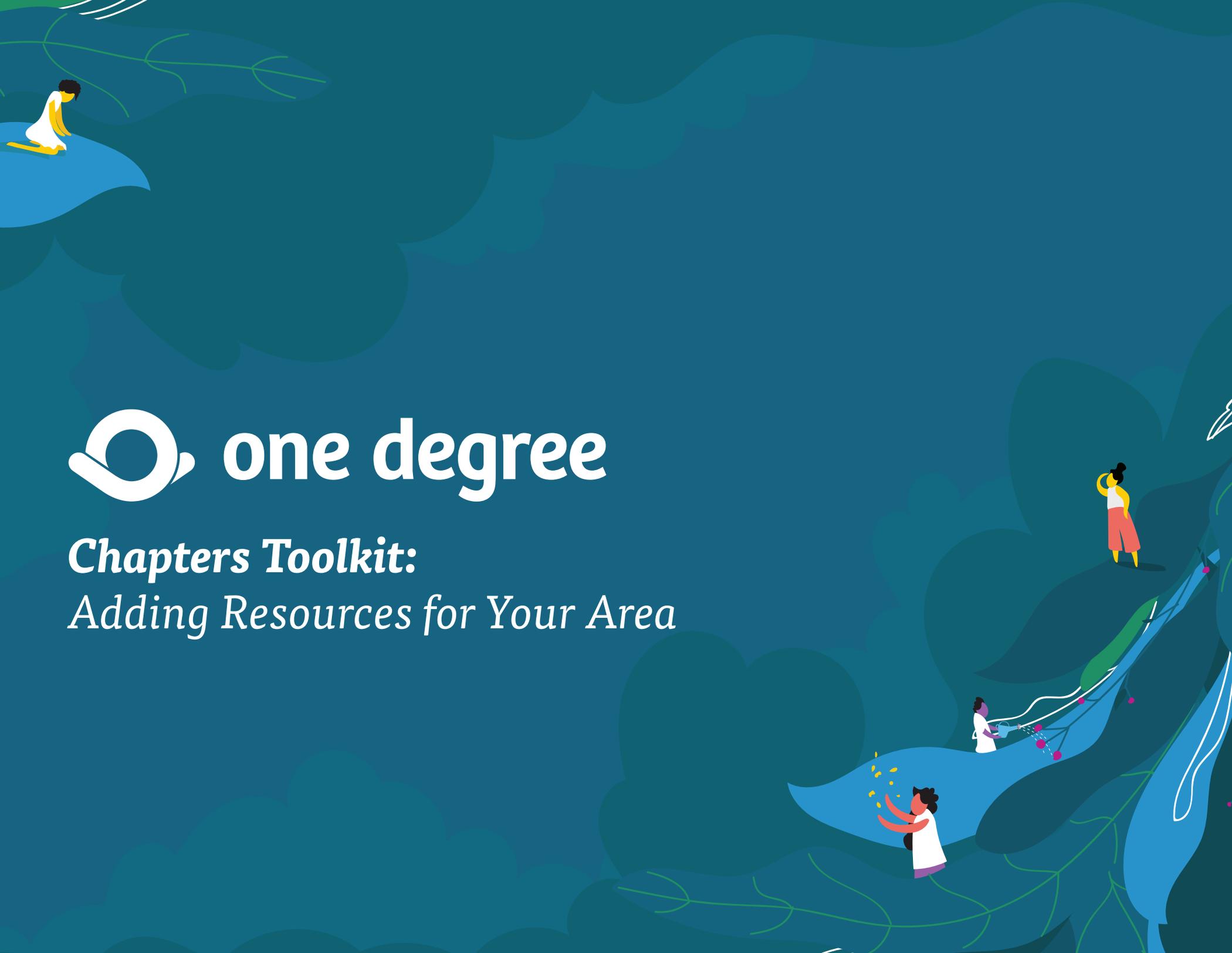




**Chapters Toolkit:**  
*Adding Resources for Your Area*



# Table of Contents

- 3 [Welcome](#)
- 4 [Overview of process](#)
- 5 [This toolkit includes...](#)
- 6 [Key materials](#)
- 7 [Before you get started](#)
- 9 [Getting started](#)
- 10 [Wrapping up](#)
- 11 [One-on-one staff support](#)





# Welcome!

*And thank you so much for your interest in adding valuable community resources to the One Degree platform.*

We want to provide you with as much support as possible to be able to add the available resources in your area on the One Degree platform. **Please note, it is not a requirement to use this toolkit or the provided materials** - anyone can add or edit any resource on One Degree just by creating a One Degree account. We have developed this toolkit and included materials as an offering based on our expertise from doing this work ourselves. It is written with the assumption that you are using all the tools provided, but you don't have to.

Additionally, we want to emphasize that **we are committed to providing a comprehensive, up-to-date platform of community resources for our members**. That's why you will see us requesting detailed information about each service/program (Opportunity) that is added to the platform, such as cost, eligibility requirements, and "What to do Next" information. **This may require more work for you and your team than anticipated**, including additional online research or contacting an organization directly for further information. **Our members are depending on us to provide comprehensive, accurate information - this is an honor we do not take lightly**. Please let that energize and motivate you!

# Overview of process

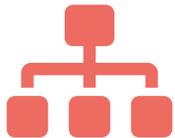
More detail on the following pages and in the [detailed instructions doc](#)



## 1. Let us know your plan

...to add resources to One Degree via [help@1degree.org](mailto:help@1degree.org) - we're here to help!

- Optional**
- Review the below materials and instructions
  - Complete the Prep Questionnaire



## 2. Create One Degree accounts

...and connect with your organization page on One Degree

- Optional**
- Create a Collection on One Degree; you can add all your go-to resources here!
  - As you're conducting online research, add resource information to the Worksheet



## 3. Add all resource information

...to One Degree platform using the Resource Editing Tool



## 4. Connect with One Degree team

...to provide feedback and/or testimonial on your experience

# ***This toolkit includes...***



## ***A checklist***

To help you keep organized as you add resources to One Degree



## ***Information***

About receiving support from One Degree staff



## ***Written and video training materials***

For gathering resource information and using the Resource Editing Tool on the One Degree website



## ***A template spreadsheet***

For tracking resources you're adding to One Degree, including if you're creating your own One Degree collection (optional)

# Key materials

## **Prep Questionnaire**

[Google Doc](#)

[Word Doc](#)

[PDF version](#)

## **Checklist**

[Google Sheet](#)

[Excel Sheet](#)

## **Worksheet**

[Google Sheet](#)

[Excel Sheet](#)

## **Detailed Instructions**

[Google Doc](#)

[Word Doc](#)

[PDF](#)

## **Feedback Survey**

[Google Doc](#)

[Word Doc](#)

[PDF](#)

To access Google Docs and Sheets, you must be logged into a Google account



# Before you get started, part 1

Please make sure you and your team have done the following:

- **Complete [Prep Questionnaire](#) with team**
- **Create One Degree Pro member account(s)**  
And connect to [your organization page](#)
- **Practice using the Resource Editing Tool**  
Have each team member add two organizations and attributed opportunities to One Degree. Wait to receive feedback from our team via email.1
- **Review checklist and this document**  
Become familiar with the process
- **Decide if you would like one-on-one support from our team**  
If so, email us at [help@1degree.org](mailto:help@1degree.org) and we can discuss further.
- **If you have any questions after reading these materials in detail**  
Reach our Member Support team via Live Chat (yellow button available on the bottom of every One Degree web page; Mon-Friday 10:30am-12:30pm, excluding holidays), or via email at [help@1degree.org](mailto:help@1degree.org)

You are welcome to follow these [detailed instructions](#) as you conduct this work, and use the [checklist](#) to keep track of tasks as you go.



# Before you get started, part 2

## Review training materials

### Pro Training E-Guide

With short tutorial videos will help your team learn about the One Degree's free pro features available to them. For this project, focus on:

[Episode 1 - Create and Connect an Account](#)

[Episode 6 - Use the Resource Editing Tool](#) (<5 minutes)

[\[Optional\] Episode 5 - Set Bookmarks and Collections](#) (<3 minutes)

### **FAQs on Adding and Editing**

[Resource Editing Tool \(includes 30min training video\)](#) and [How to Create a Collection](#). Some examples of great collections are [here](#) and [here](#).

You are welcome to follow these [detailed instructions](#) as you conduct this work, and use the [checklist](#) to keep track of tasks as you go.

### One Degree Data Standards

Data Principles, Content Guidelines, and Data Structure. After exploring how to search and filter for resources, you may review One Degree's data standards to better understand our approach to providing social service information to the public, and what may and may not be published on the platform.

### List of Tags and Properties

Includes descriptions. *Tags* are categories of resources, and *Properties* are attributes that describe who the resources serve.



# Getting started

## 1. Add resource information to the Worksheet

- **Add Directories/Resource lists** you're using to the appropriate tab
- **Check and track what resources** are already on One Degree  
[Optional] Create a Collection on One Degree in which you will add these resources

*TIP: You can also create categories to better organize the Collection!*

- **Add resource information** from your directories/resource lists to the Worksheet

*TIP: You're welcome to ask One Degree staff to review your work as you go, so if there is any general feedback we can communicate it early in the process.*

- **Conduct research** to find missing resource information
- **Add all missing resource information** to the Worksheet in tabs "2. Add Missing Organizations" and "3. Add Missing Opportunities"

You are welcome to follow these [detailed instructions](#) as you conduct this work, and use the [checklist](#) to keep track of tasks as you go.

## 2. Notify One Degree staff

That you're ready to start using the [Resource Editing Tool \(RET\)](#). We can review your resource information in the Worksheet, so you get any overall feedback and make improvements (if needed) before adding the resources to One Degree. This saves you time!

## 3. Use the Resource Editing Tool (RET)

To add all resource information to One Degree once all information is added to the Worksheet.

## 4. Look in your inbox

For approved or not approved emails from our team. You'll get notified when each resource is approved or not approved. Approval emails may contain helpful feedback, so please read every email. Add resources to your new Collection, if applicable.

## 5. If your resource needs to be resubmitted

Resubmit and wait to receive an approval email. :)

# Wrapping up



## **1. Check in with One Degree team**

Share any lingering questions or issues.



## **2. Have wrap-up meeting with One Degree staff**

To provide detailed feedback and/or testimonial on overall process.



## **3. Celebrate!**

Providing community members with life-improving resources in a big accomplishment. We encourage you to have a celebratory event with your team once your work is complete! :D

Now that you've developed skills in using the Resource Editing Tool, we can develop a plan to support you to continue submitting or suggesting edits, if desired.

***We also recommend updating the resources on the One Degree platform when any changes occur.***

(e.g., change in phone numbers, new location opened, specific services no longer provided).



# One-on-one staff support

Your team may benefit from support from our experienced Resource Management team! Our team can help you stay focused, organized and accountable to your goals. We will provide check-ins and training meetings with your team throughout the process. If you are interested in One Degree support, please email us at [help@1degree.org](mailto:help@1degree.org).

## *Criteria for one-on-one staff support*

- Completed the Prep Questionnaire
- Inform One Degree what template you will be using (paper copy, excel template, etc.)
- Have at least 2 staff members who will dedicate time to this project
- Willing to have check-in and follow-up meetings
- Commit to detailed feedback and/or testimonial meeting at the conclusion of the project





# *Thank you!*



one degree

