

Chapter resources

CLEO

2026-10-09

Contents

Choose a resource for the job	1
Reach a venue or school	2
Plan the first meet-and-greet	2
Run a regular technology-help visit	3
Teach a short class	3
Lesson 1: Get comfortable with a device	3
Lesson 2: Calls, messages, and video conversations	3
Lesson 3: Find information and write an email	4
Build a realistic activity calendar	4
Optional social and year-end gathering	4
Reflect and prepare the next leaders	5
About this edition	5

Choose a resource for the job

These practical tools build on CLEO's chapter resource collection. Use them alongside the [setup guide](#), [operation guide](#), and your chapter workspace. They are optional aids; they do not create additional filings or replace the platform's records.

Download a Word copy to edit in Word or upload to Google Docs, or print the PDF. Replace every bracketed field before sharing. Blank templates are public; completed attendance and volunteer schedules should stay with the people who need them.

Resource	Use it for	Downloads
Outreach emails	Introduce a chapter to a host, or help a host approach a school	Word · PDF
Session planner	Agree on the visit, roles, equipment, and agenda	Word · PDF
Volunteer schedule	Plan who is expected at upcoming visits	Word · PDF
Attendance worksheet	Record actual arrival/departure times and a senior headcount	Word · PDF
Senior participant handout	Explain what CLEO can help with and advertise the next visit	Word · PDF

Resource	Use it for	Downloads
Student and parent handout	Explain participation, registration, consent, and training	Word · PDF
Chapter reflection worksheet	Gather useful notes before the semester report and leadership handover	Word · PDF

Reach a venue or school

The outreach templates give you a starting message. Personalize the opening to the community and the person you are contacting. Explain the kind of technology education you can offer, ask about residents' interests, and suggest a conversation about a workable schedule.

Do not promise that a chapter is approved, an agreement is signed, or a partnership exists unless that is true. If you are still forming the chapter, say so. Use the [Start a chapter guide](#) as the introductory link; no old slideshow or GroupMe invitation is needed.

Ask who coordinates activities and who has authority to review the host arrangement. If an email goes unanswered, follow up politely or ask about an appropriate time to visit. Keep any personal contact list private.

Give prospective volunteers the student/parent handout and the chapter's public registration link. Give senior participants the separate participant handout with the agreed venue, schedule, and chapter contact. An information handout does not replace consent or an agreement.

Plan the first meet-and-greet

Adapt this example to the host's time and residents' preferences:

Time	Activity
10 minutes	Welcome, names, and a plain-language explanation of CLEO
10 minutes	Small-group introductions around interests or hobbies
15 minutes	Ask what participants want to learn and which devices they use
10 minutes	Explain the next visits, where to meet, and how to ask for help
10 minutes	Questions and a tour of the meeting space if useful
5 minutes	Buffer and a friendly close

Bring name tags if the host permits them, a few conversation prompts, and the participant handout. Useful prompts include "Who would you like to stay in touch with?" and "What would you like your device to make easier?" Do not make someone demonstrate a difficulty in front of the group.

Confirm the host contact and agreed supervision before the visit. Record only the information needed for the activity and follow the host's privacy practices.

Run a regular technology-help visit

Arrive early enough to check seating, the host-approved internet connection, and any equipment. Agree who greets participants, who coordinates the waiting list, and who helps with each topic.

For a one-hour visit, try five minutes of welcome, forty-five minutes of individual or small-group practice, and ten minutes for recap, questions, and the next visit's details. Adjust the plan rather than rushing a learner.

Ask each person what they want to do. Explain one step, let them try it, and invite them to repeat it without prompting. Use their device when appropriate and keep them in control. Do not enter or retain passwords or sensitive personal information. Follow the [Volunteer Handbook](#) and refer work outside volunteer boundaries to the host or an appropriate professional.

Use the schedule for expected attendees and the attendance worksheet for actual attendance. They serve different purposes. Afterward, enter the completed session in the platform. The current form divides combined hours equally among selected volunteers; if people served different durations, preserve the accurate times and ask for help before assigning credit. See [session instructions](#).

Teach a short class

Choose one useful outcome, demonstrate it slowly, and allow more time for practice than for explanations. Test the example on the devices available that day; button names and layouts vary. Invite questions without assuming everyone starts at the same level.

These are lesson plans for seniors. They are separate from the [required volunteer training](#).

Lesson 1: Get comfortable with a device

Goal: the participant can find a familiar app and make one useful accessibility or comfort adjustment.

1. Ask which device they use and what they want to feel more confident doing.
2. Identify the controls on that device. Practice returning to its home screen, tapping or clicking, and scrolling.
3. Demonstrate a helpful adjustment such as text size, brightness, or volume, with the owner's agreement.
4. If needed, ask the host which Wi-Fi network guests should use and let the participant connect. Do not assume a familiar network name proves who operates it.
5. Have the participant open a familiar app, return home, and repeat the useful adjustment. Finish with one thing to practice before the next visit.

Allow about five minutes for introductions, ten for demonstration, twenty for supported practice, and ten for repetition and questions. Use fewer tasks when learners need more time. Do not turn a basic lesson into device repair or permanent deletion.

Lesson 2: Calls, messages, and video conversations

Goal: the participant can choose a known contact, start a conversation, and end it confidently.

1. Agree on a willing practice partner and the app the participant actually uses. Check the intended recipient before sending or calling.
2. Practice a short call or message. Explain speaker, mute, and end-call controls when relevant.
3. Show that a group conversation shares a message with the people in that group. Use a non-sensitive practice message.

4. For video, demonstrate the microphone, camera, and leave controls. Choose a quiet place and check what is visible behind the participant.
5. Let the participant repeat the task and explain how they would end the call or correct an unsent message.

Do not assume every device has the same calling options or that calls are free of data or carrier charges. For example, Android and Windows users can join a FaceTime invitation in a supported browser; use [Apple's current instructions](#) when that is the task.

Lesson 3: Find information and write an email

Goal: the participant can return to a useful website and prepare a simple message for a known recipient.

1. Open the participant's browser and explain the address bar, back button, and tabs using the screen in front of you.
2. Search for a non-sensitive topic they choose, such as a library's opening hours. Check the source; the first search result is not automatically the right one.
3. Save a useful page as a bookmark if the participant wants one, then practice finding it again.
4. In an account the participant already controls, identify the recipient, subject, and message fields. Draft a short practice email and let the participant decide whether to send it.
5. Review who will receive a reply or forwarded message. Use only a harmless sample attachment if practicing attachments.

Avoid password recovery or account changes beyond the volunteer's abilities. The participant enters their own sensitive information. A locked or encrypted connection does not establish that a website is trustworthy; [Chrome's explanation of its security indicator](#) makes this distinction. Pause on an unexpected urgent request and help the participant find a known, independent contact route. [CISA's security resources](#) provide material for general scam-awareness discussion.

Build a realistic activity calendar

The exported schedules combine regular technology help, occasional classes, and optional social events. Treat that as a menu, not a required monthly curriculum.

- **Opening visits:** introductions, interests, device basics, and a dependable schedule.
- **Next visits:** reinforce a few useful skills, then add calls/messages or email when participants are ready.
- **Through the term:** keep regular help available, repeat skills, and choose occasional classes based on questions people bring.
- **Before a break:** tell the host and participants when visits pause and resume.
- **Toward year end:** review learning, thank participants and volunteers, and train incoming leaders.

Keep banking, bill payments, purchases, medical records, and other restricted tasks outside volunteer practice. Earlier curriculum drafts included these activities; they are not part of this resource kit. Do not follow an old monthly outline instead of the current handbook.

Optional social and year-end gathering

A holiday social or year-end celebration can give students and seniors time to connect. Plan it with the host and choose activities that fit the participants. Games, conversation, a short reflection, and thank-you notes are sufficient; spending money or exchanging gifts is optional.

Confirm the host's accessibility, food, decoration, and photo requirements. Keep paths clear, arrange any refreshments with the host, and obtain the appropriate permission before taking or sharing identifiable photographs.

A simple gathering can include ten minutes of welcome, twenty minutes of a shared activity or conversation, ten minutes of participant reflections, and ten minutes of thanks and next steps. Participation in a speech or photo should be optional. Describe certificates as recognition of participation or learning, not professional qualifications.

For a short welcome speech: thank the host and participants, share one accurate example of progress, acknowledge volunteers, and explain how the program will continue. Obtain permission before using someone's personal story.

Reflect and prepare the next leaders

Use the chapter reflection worksheet to collect successes, difficulties, participant feedback, and support needs. It is a preparation aid, not another required report.

Check session records before summarizing hours. Do not add together per-session senior headcounts and call that the number of different seniors served in the semester; a returning participant appears in more than one session. Use your chapter's privacy-conscious counting method and ask for help when an estimate cannot be represented accurately.

Agree who will maintain the host relationship, scheduling, volunteer training, and platform records after the current team leaves. Invite successors through the platform, have them help with real tasks, and verify access before stepping down. File reports and renewal through the actual due cards in the workspace.

About this edition

Updated 2026-10-09. [Open the current web guide](#). This PDF is an offline copy of the same reviewed text. Examples use fictional records; screenshots are dated in their captions.