



Volunteer Portal Presentation

Welcome

What is the Volunteer Portal?

- **The Volunteer Portal** is a community resource devoted to promoting volunteerism by supporting the work of local nonprofit organizations
- With **your help**, the Volunteer Portal will be the go-to volunteer hub of the Hudson Valley

Welcome

Why use it?

- **Exposure** of your organization's volunteer opportunities both on the local and national level
- Easily post **one-time and ongoing** volunteer opportunities to support your organization's mission
- **User-friendly** system; keeps track of volunteer hours
- Access to **growing database** of local volunteers

Welcome

Why use it?

- Nonprofit partner organizations registered on the portal are given **primary access** to United Way Day of Caring volunteer projects **3 times per year**



Welcome

- ✓ To begin go to **uwdor.org**
- ✓ Click on **“Volunteer”**



- ✓ Or simply go to **volunteer.uwdor.org**

Welcome

- ✓ This is the home page; **both volunteers and nonprofit partners** access the portal here
- ✓ Once your profile is created, simply “**Login**”

The screenshot shows the homepage of the United Way of the Dutchess-Orange Region Volunteer Portal. The header features the United Way logo and the text "United Way of the Dutchess-Orange Region" with the tagline "GIVE. ADVOCATE. VOLUNTEER." Navigation links include "About Us", "Our Programs", "Support Us", "Donate", and "Resources", along with a "LOGIN" button. A secondary navigation bar lists "For Volunteers", "For Nonprofit Organizations", and "For Corporate Partners". Below this is a horizontal menu with links: "BECOME A VOLUNTEER", "FIND AN OPPORTUNITY", "OPPORTUNITY CALENDAR", "SPECIAL EVENTS", and "BROWSE PARTNER ORGANIZATIONS". The main content area includes a "Find Volunteer Opportunities" search box with fields for "Keyword(s)", "City & State and/or Zip Code" (pre-filled with "12601"), and "Distance" (set to "Any"). A "SEARCH" button and an "ADVANCED SEARCH" link are also present. To the right of the search box is a photo of four smiling volunteers holding a sign that says "SUPPORT OUR WORK - DONATE!". Below this is a "Volunteer Spotlight" section with a photo of a group of volunteers and a welcome message: "Welcome to the Volunteer Portal! This community resource is part of United Way's volunteer initiative. With your help we strive to be the volunteer hub of the Dutchess-Orange Region. As a key element of the Campaign for the Common Good we are seeking increased engagement and stronger partnerships with our business,..."

Making a Nonprofit Partner Profile

✓ Click “For Nonprofit Organizations”

✓ Then “Become a Partner”

United Way of the Dutchess-Orange Region
GIVE. ADVOCATE. VOLUNTEER.

For Volunteers **For Nonprofit Organizations** For Corporate Partners

BECOME A PARTNER BROWSE PARTNER ORGANIZATIONS SEARCH WIDGET PROFESSIONAL DEVELOPMENT

► Sign Up/ Registration
► Top 10 Reasons to Post Opportunities

We know good volunteers are hard to come by. We want to make it **easier for you** to find volunteers. We want to connect you to high quality volunteers you can count on time after time. We want to help you in your mission to strengthen our community. You can have volunteers in no time! Sign up now to create your nonprofit profile and start posting opportunities.

Making a Nonprofit Partner Profile

✓ Finally....**Signup/register!**

✓ Nonprofit partner profiles can have **multiple users** registered

United Way of the Dutchess-Orange Region

GIVE. ADVOCATE. VOLUNTEER.

For Volunteers | For Nonprofit Organizations | For Corporate Partners

BECOME A PARTNER | BROWSE PARTNER ORGANIZATIONS | SEARCH WIDGET | PROFESSIONAL DEVELOPMENT

Sign Up/Registration

Top 10 Reasons to Post Opportunities

Organization Sign Up

If you are a nonprofit, school, faith-based, government or civic organization that would like to partner with us to recruit and manage volunteers, please complete the information below.

SUBMIT

BASIC INFO * Required

* Organization Name

Website

* Mission Statement

* Primary Population Served

* Primary Impact Area

Federal EIN

LOGO

UPLOAD LOGO

Making a Nonprofit Partner Profile

✓ Use “**Volunteer Opportunity Wizard**” to make volunteer opportunities

✓ “**Connections**” are volunteers that have signed up to help your organization

***Most important feature!**

Customer Portal

volunteer.uwdor.org/home/home.jsp

Apps Citrix XenApp - Logon Free Hotmail Home - FAFSA on the ... Online Data Manager SRFs MUST DO List Imported From IE United Way of the Dut... United Way of the Dut...

Home Volunteer Opportunities **Connections** Locations Reports My Organization Partner Help Switch to Volunteer Portal Documents

Site Managed by:

United Way

United Way of the Dutchess-Orange Region

HandsOn Connect shows you:

Volunteer Opportunity Wizard

Confirm and Verify Volunteers

- Volunteers Awaiting Confirmation and Scheduling
- Attendance Verifications Due

Volunteer Opportunity Related Skills List

- HandsOn Connect Skills

Search

Search All

Go!

Welcome to the Partner Portal!

There are three principal tasks you'll do here in the portal:

Create Volunteer Opportunities:

- Always create New Volunteer Opportunities by clicking on the **Volunteer Opportunity Wizard** link on the left sidebar.
- After completing the wizard, click on the "Add / Change Description" link in the Volunteer Opportunity Record and add a description of the opportunity. Click Save, Close, and Refresh the browser page to update the record.
- (Optional) Add additional search characteristics, skills or custom questions.
- Click on the "Submit for Approval" link when you're ready for us to review and publish your volunteer opportunity and its occurrence(s).

To add additional occurrences or recurrences, click on the Volunteer Opportunity Tab, find the volunteer opportunity, and click on the "Create New Occurrence" or "Create New Recurrence" link. For more information -- see the HELP Tab.

Confirm and/or schedule pending volunteers who have expressed interest in an opportunity:

- Click on the sidebar link **Volunteers Awaiting Confirmation and Scheduling**
- This will open a report showing you all Volunteer Opportunities where volunteers are awaiting approval.
- Click on the link for the **Occurrence Record ID** - It will start with OC- and be followed by the record ID Number.
- This will take you to the occurrence where one or more connections are waiting for your approval and/or scheduling.
- See the "connections" section of the record for pending/declined connections, and approve or decline as appropriate.
- After completing confirmations for this occurrence, click on the report again to find other occurrences with confirmations due.
- Go back to the Home Tab and the sidebar link to run the report again to see other occurrences where verifications are due.
- When no opportunities show up in the report - your confirmations are up-to-date
- Note: This is only needed if you create "express interest" or "to be scheduled" volunteer opportunities. Volunteer signing up for "sign-up" opportunities will automatically be confirmed if they meet the opportunities restrictions and space is available.

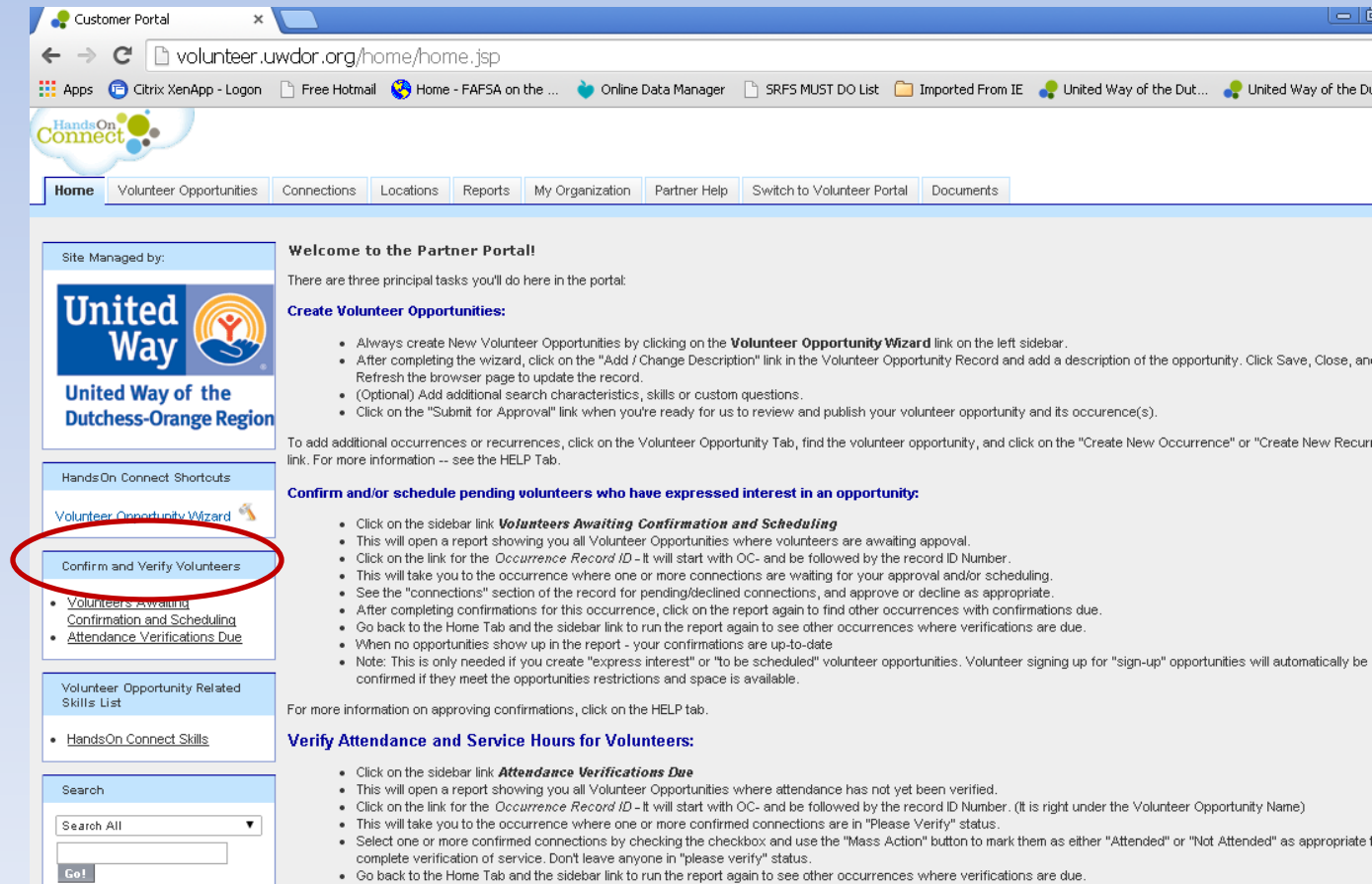
For more information on approving confirmations, click on the HELP tab.

Verify Attendance and Service Hours for Volunteers:

- Click on the sidebar link **Attendance Verifications Due**
- This will open a report showing you all Volunteer Opportunities where attendance has not yet been verified.
- Click on the link for the **Occurrence Record ID** - It will start with OC- and be followed by the record ID Number. (It is right under the Volunteer Opportunity Name)
- This will take you to the occurrence where one or more confirmed connections are in "Please Verify" status.
- Select one or more confirmed connections by checking the checkbox and use the "Mass Action" button to mark them as either "Attended" or "Not Attended" as appropriate to complete verification of service. Don't leave anyone in "please verify" status.
- Go back to the Home Tab and the sidebar link to run the report again to see other occurrences where verifications are due.

Making a Nonprofit Partner Profile

✓ Check “**Confirm and Verify Volunteers**” regularly to confirm volunteer attendance



The screenshot shows the 'Customer Portal' for the United Way of the Dutchess-Orange Region. The browser address bar displays 'volunteer.uwdor.org/home/home.jsp'. The page features a navigation bar with tabs: Home, Volunteer Opportunities, Connections, Locations, Reports, My Organization, Partner Help, Switch to Volunteer Portal, and Documents. The main content area is titled 'Welcome to the Partner Portal!' and lists three principal tasks. The first task, 'Create Volunteer Opportunities', includes instructions on using the 'Volunteer Opportunity Wizard'. The second task, 'Confirm and/or schedule pending volunteers who have expressed interest in an opportunity', includes instructions on using the 'Volunteers Awaiting Confirmation and Scheduling' report. The third task, 'Verify Attendance and Service Hours for Volunteers', includes instructions on using the 'Attendance Verifications Due' report. The sidebar on the left contains links to 'HandsOn Connect Shortcuts', 'Volunteer Opportunity Wizard', 'Confirm and Verify Volunteers' (circled in red), 'Volunteers Awaiting Confirmation and Scheduling', 'Attendance Verifications Due', 'Volunteer Opportunity Related Skills List', and 'HandsOn Connect Skills'. A search bar is located at the bottom of the sidebar.

Customer Portal

volunteer.uwdor.org/home/home.jsp

Apps Citrix XenApp - Logon Free Hotmail Home - FAFSA on the ... Online Data Manager SRF5 MUST DO List Imported From IE United Way of the Dut... United Way of the Dut...

HandsOn Connect

Home Volunteer Opportunities Connections Locations Reports My Organization Partner Help Switch to Volunteer Portal Documents

Site Managed by:

United Way
United Way of the Dutchess-Orange Region

HandsOn Connect Shortcuts

Volunteer Opportunity Wizard

Confirm and Verify Volunteers

Volunteers Awaiting Confirmation and Scheduling

Attendance Verifications Due

Volunteer Opportunity Related Skills List

HandsOn Connect Skills

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Search All

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Making a Volunteer Opportunity




- ✓ Click on “**Volunteer Opportunity Wizard**”
- ✓ The system will walk you through **each field**

This is what a volunteer opportunity in progress looks like

Volunteer Opportunity Wizard 

= Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name	<input type="text" value="National Volunteer Week"/>
Primary Impact Area	<input type="text" value="Civic & Community"/>
Opportunity Coordinator	<input type="text" value="Melissa Clark"/> 
Location	<input type="text" value="United Way Poughkeepsie Office"/> Create Location
Type 	<input type="text" value="Project"/>
Disaster Opportunity Type	<input type="text" value="Not Disaster Related"/>
Minimum Age	<input type="text" value="18"/>
Minimum Age (w/ adult)	<input type="text" value="13"/>
Schedule Type 	<input type="text" value="Date & Time Specific"/>
Registration Type	<input type="text" value="Sign Up"/>
Minimum Attendance	<input type="text" value="10"/>
Maximum Attendance	<input type="text" value="50"/>
Does this occur on a regular schedule?	<input type="text" value="Yes"/>


After creating this opportunity, you should click on the link to create new recurrence

Start Date	<input type="text" value="4/6/2014"/> [3/3/2014]
End Date	<input type="text" value="4/13/2014"/> [3/3/2014]


After creating this opportunity, you will need to add the Opportunity Description before it can be published.

Making a Volunteer Opportunity

- ✓ Project versus activity
 - Project-volunteer opportunity
 - Activity-Training, recognition ceremony, etc.

Volunteer Opportunity Wizard  ! = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

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Primary Impact Area	<input type="text" value="Civic & Community"/>
Opportunity Coordinator	<input type="text" value="Melissa Clark"/> 
Location	<input type="text" value="United Way Poughkeepsie Office"/> Create Location
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Maximum Attendance	<input type="text" value="50"/>
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End Date	<input type="text" value="4/13/2014"/> [3/3/2014]

After creating this opportunity, you will need to add the Opportunity Description before it can be published.

Making a Volunteer Opportunity

✓ “Date & Time Specific” versus “To Be Scheduled”

✓ “Express Interest” versus “Sign-up”

✓ For repeating projects make a “Recurrence” when creating opportunity

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

☒ Opportunity Created

☒ Occurrence Created [Create New Occurrence](#)

☐ Recurrence Created [Create New Recurrence](#)

☐ Opportunity Description [Add/Change Description](#)

☒ Opportunity Characteristics (Optional – Improves Search and Metrics)

☐ Opportunity Published (Status: Pending) [Submit for Approval](#)

☐ Verifications Complete

Total Active Occurrences: 0Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

Organization ServedUnited Way of Dutchess - Orange Region

Custom LinksChange Description

Information	
Owner	Melissa Clark [Change]
Volunteer Opportunity Name	Test
Status	Pending
Posting Status	If you would like this record posted online, please click the link in the overview above to "Submit for Approval" or "Publish".

Opportunity Type	
Type	Project
Activity Type	
Training Type	
Schedule Type	Date & Time Specific
Start Date	6/30/2014
End Date	6/30/2014
Disaster Opportunity Type	Not Disaster Related

Registration Information	
Registration Type	Sign Up
Minimum Attendance	10

Making a Volunteer Opportunity

- ✓ After clicking “**Submit**” the system will bring you back to the newly created volunteer opportunity
- ✓ At that point you will have a chance to fill in the “**Description Information**”
- ✓ Finally, click “**Submit for Approval**”

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

<input checked="" type="checkbox"/> Opportunity Created		<input type="checkbox"/> Opportunity Description Add/Change Description
<input checked="" type="checkbox"/> Occurrence Created Create New Occurrence		<input checked="" type="checkbox"/> Opportunity Characteristics (Optional – Improves Search and Metrics)
<input type="checkbox"/> Recurrence Created Create New Recurrence		<input type="checkbox"/> Opportunity Published (Status: Pending) Submit for Approval
		<input type="checkbox"/> Verifications Complete

Total Active Occurrences: 0

Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

For Best Results....

- Post all organizational volunteer needs **often**
- Use Volunteer Portal for both **one-time opportunities/events** and **ongoing opportunities** i.e. administrative help, community outreach volunteers
- Read “**Professional Development**” section of website to learn about upcoming training opportunities
- Submit **Volunteer Spotlight**- A committed volunteer at your organization will be recognized throughout the community

Examples



Questions Navigating Portal?

- Click on “**Partner Help**” for a tutorial
- Or.....

The screenshot shows a web browser window with the URL `volunteer.uwdor.org/servlet/servlet.Integration?lid=01ri0000000YCHb&ic=1`. The browser's address bar and tabs are visible at the top. Below the browser window, the HandsOn Connect logo is on the left, and a navigation bar contains links: Home, Volunteer Opportunities, Connections, Locations, Reports, My Organization, **Partner Help** (circled in red), Switch to Volunteer Portal, and Documents. Below the navigation bar, the main content area features the HandsOn Connect logo and the text "Points of Light". A breadcrumb trail reads "HandsOn Connect Partner Portal Documentation > Premium Portal - for local and National Partners". A "Subscribe to our feed" link is present. The "Topics" section lists several items with counts: "Getting Started: Logging in to your account" (2), "Create Volunteer Opportunities - Using the Volunteer Opportunity Wizard" (4), "Additional options you might consider before submitting your volunteer opportunity for approval" (5), and "Submitting Your Opportunity for" (1). The "Premium Portal - for local and National Partners" section includes a search bar and two main topics: "Getting Started: Logging in to your account" and "Create Volunteer Opportunities - Using the Volunteer Opportunity Wizard". Each topic has a list of links: "Logging In and getting started", "Overview of the Home Tab and HandsOn Connect user interface", "Using the Volunteer Opportunity Wizard (Partner Portal)", "Understanding the Volunteer Opportunity Overview (Partner Portal)", and "Opportunity Description (Partner Portal)".

Questions Navigating Volunteer Portal?

- **Contact me!**
- Melissa Clark, Community Engagement Coordinator
 - mclark@uwdor.org
 - 845-471-1900 x3128

Thank you!

