Nonprofit Partner Portal
Training Manual

Website: http://www.volunteerdelaware.org

Username: _____

Password: _____

Manual Last Update: Monday, July 18, 2016

Adapted from the Hands-On Portland Manual

Welcome to the Nonprofit Portal Training Manual!

We have designed this guide to help walk you through the Partner Portal and everything you'll need to know to successfully submit, edit, and manage your volunteer opportunities through the Hands On Connect system. There are many exciting features available in this system which we hope you'll explore – everything from adding custom questions for volunteers to answer upon registration to back-end management of volunteer interest inquiries to track volunteers' follow-through.

This guide is meant to be a helpful resource to be referred to whenever necessary, and in bite-sized chunks. We don't expect you to read it cover to cover, but instead hope that you will easily be able to skip to the sections the relate to your immediate needs.

Please feel free to reach out to us directly if you have questions that are not answered within the pages of this guide. That's what we're here for!

~ The Hands On Partner Services Team

Who Is My Primary Hands On Contact?

► If your organization's office is in New Castle County:

Clare Garrison
Volunteer Services Coordinator
clare.garrison@state.de.us
302-255-9899

► If your organization's office is located in Kent or Sussex County:

April Willey
Volunteer Services Administrator
april.willey@state.de.us
302-857-5006

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Nonprofit Partner Portal Registration:

Once you have been approved as a Partner Portal User for your organization, you will receive an email to let you know that your User Account has been created. It will include your login and password information, which you can use to login to the Partner Portal.

If you don't already have profile on the Volunteer Delaware website, you will first need to create one (just like a volunteer would). The initial username and password that will be sent to you upon registration will allow access to the front-end of the website only. Please contact your Hands On Partner Services staff member to request Partner Portal access once you have registered.

Logging in to the Partner Portal:

1. Once you have your username and password, go to the Hands On Volunteer Delaware homepage (www.volunteerdelaware.org) and click on the green "**LOGIN**" button in the upper right-hand corner of the screen. Your username is by default the email address associated with your Hands On account.

2. When prompted, enter your Username (by default, the email associated with your Hands On account) and Password. Then click **LOGIN**.

   NOTE: If you have forgotten your password, click on "**Forgot password?**" (just above the password box) to have your password reset via email. When you sign in, you will be asked to choose a new password.

3. If you have Partner Portal access, you will likely be automatically directed to the Partner Portal (the administrative side of the website) upon logging in, where you'll be able to manage your organization's volunteer opportunities and submit new projects.
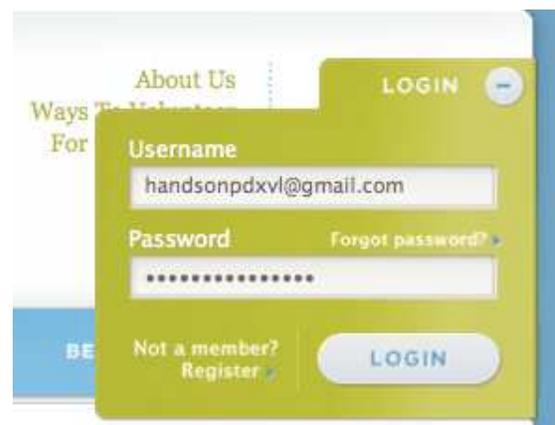
Switching between the Partner Portal and the public Hands On website (aka. the "Volunteer Portal")

To access the public side of the website, simply click on the "**Switch to Volunteer Portal**" tab, and the system will take you to the public website. You can visit the public website to see how your volunteer opportunities and account information look to volunteers. **Please note, however, that your volunteer opportunities will not show up on the website until they have been approved by Hands On staff.**

From the public website, you can access the volunteer leader portal by clicking on the "**Return to Organization Portal**" link in the upper right-hand corner below the "Logout" button.

The Partner Portal Visual Overview:

The Home screen: – The Nonprofit Partner Resource Center is the first screen you'll see when you log in. This area, along with the "Partner Resources" section (on the left side of the screen below the search box), is where we'll be posting announcements, links, documents, and other information pertinent to our nonprofit partners. Please skim both of these sections each time you log in to see if we've posted new information that pertains to you!

Vertical Menu Options:

1. **"Create New" menu** – The "Create New" dropdown menu is an easy shortcut to create a new Volunteer Opportunity, Occurrence, or Location record in the system.

2. **Partner Resources** – From training manuals to tips on leading volunteer reflections, keep an eye on this area for all sorts of important documents and helpful resources.

3. **The Search Box** – From "Search All" you can search Volunteer Opportunities, Organizations, Contacts, Tasks, Notes or Reports. You can narrow down your search by selecting a specific category from the drop down menu.

4. **Recent Items** – Very useful "recently viewed items" list, for you to easily go back to a page you were just on. Note that while Volunteer Opportunities & Contacts display with their names in this list, Occurrences display with their ID numbers (visible as OC-######) as do Connections or sign-ups (visible as CO-######). There is currently no easy way to see, in the "recent items" view, pertinent information like the volunteer opportunity or contact to which an occurrence or connection relates.

Horizontal Tabs:

1. **The Home screen** – This is where the Nonprofit Partner Resource Center resides. We will update this landing page with the latest Partner resources for your benefit! Please give it a glance every time you sign in to see check for important updates and announcements.

2. **My Organization** – This tab lists the account information for your organization. It includes basic information like your mission statement and website which show up in your Organization Profile on the public site, as well as the primary contact information associated with the account.

3. **Partnership Paperwork** – Once we transition to online storage of our files, we will track your organization's partnership paperwork through this tab. It will let you know what you have on file (with PDF copies available to view) and if any paperwork is missing.

4. **Locations** – Every organization has at least one (and often more) locations associated with the volunteer opportunities it posts. Each location is listed in its own record, and includes pertinent information like parking, entrance, and public transit directions, as well as an automated link to Google maps. Location records can be linked to multiple Volunteer Opportunities and Occurrences.

5. **Volunteer Opportunities –** Here, you'll find the Volunteer Opportunities submitted and managed by your organization. Volunteer Opportunity Records contain the overarching information about a volunteer opportunity, such as description, search criteria, restrictions (e.g. age), and more. You can use the "View" dropdown menu to choose which groups of opportunities you'd like to see (e.g. just opportunities "pending approval").

6. **Occurrences –** This is where you'll find all the Occurrence(s) related to each Volunteer Opportunity. The Occurrence Record is where you can see which volunteers have signed up or expressed interest in a given opportunity. Use the drop down menu to select which occurrences you'd like to view (e.g. "upcoming/active occurrences" or "all occurrences"). This is where you will approve volunteers, verify attendance, and manage your volunteer list.

7. **Connections –** The Connections tab lists volunteer "Connection" records, which represent volunteer sign-ups or volunteer referrals (e.g. a single Connection record would capture the fact that Joe Smith expressed interest in the "Afterschool Tutor" volunteer opportunity on a given date). This can be a useful place to see whether any volunteer connections remain un-verified. However, for the most part, you will work with these "connections" from the Occurrences tab.

8. **Reports –** This feature allows us to build custom reports for you, so you can easily access useful lists of information – e.g. volunteer answers to custom questions, project feedback, and more.

9. **Switch to Volunteer Portal tab** – Click here to go to the public website (e.g. if you wanted to sign up to volunteer for a project, or check to see what your opportunities look like on the front end of the website).

Updating Your Organization's Information (Primary Contact only)

Click on the **My Organizations** Tab at the top of the partner portal window. You should see your organization's account profile. Click on **Edit** to make any changes or updates to the profile.

Please note, only the Primary Contact listed for an organization will be able to make global edits to the account, such as web address, mission statement, impact area, organization contact information, and more. If you are not listed as the primary contact, you can visit this page, but you will only be able to manage your own password information through the "Edit" screen.

If you feel like the primary contact for the account should be changed to you and/or you see information that needs to be changed which you don't have access to, please contact us to discuss the appropriate updates.

Reviewing Your Organization's Volunteer Opportunities

To review all of the Volunteer Opportunities your organization has posted, click on the **Volunteer Opportunities tab** in the horizontal menu bar. Once there, a list of recently viewed Volunteer Opportunities will appear (recently viewed items include anything you've looked at in the Partner Portal OR on the public Hands On website, regardless of whether they were posted by your organization). Select **All Volunteer Opportunities** from the dropdown **View** menu and click **Go** to see a list of all of the Volunteer Opportunities your organization has posted.

In the list overview, you can find useful information such as the default location, the registration and schedule types, and the status of the Volunteer Opportunity. Note that the **Start & End Dates** listed usually refer to the recruitment window for the opportunity. Opportunity **Status** designations include:

> **Pending** = Posting is still in progress (you have not submitted it for approval).
> **Awaiting Approval** = Posting has been submitted & is awaiting approval from Hands On staff.
> **Active** = Posting has been approved by Hands On staff. Note that this may not mean posting is live on the website. It must have an associated Occurrence with Active Status as well.

Click on the **Volunteer Opportunity Name** to view a particular Volunteer Opportunity Record.

To determine which of your opportunities are actually LIVE on the Hands On website, the easiest way to do this is through the public website. Click on the **Switch to Volunteer Portal** tab to go the public website and click on **Browse Organizations** in the horizontal menu bar under "For Volunteers."

Find your Organization in the list and click on its name to view your Organization Profile. On the right-hand side of your profile, find and click on the green link that says **See All Volunteer Opportunities With this Partner Organization >>**. You will be taken to a Search Results page that lists all Volunteer Opportunities that are currently active on the site for your organization.

Organization Profile

Volunteers of America Oregon

http://www.voaor.org

Volunteers of America Oregon is a leader in creating vibrant, compassionate communities where every member is valued, every home is safe and every life is self-determined. The mission of VOA is to change lives by promoting self-determination, building strong communities, stand for social justice and empower people by providing tools, education and opportunities.

See All Volunteer Opportunities With this Partner Organization >>

IMPACT AREA(S)
Civic & Community

POPULATION(S) SERVED
Other

ADDRESS
Portland, OR, 97214

Volunteer Opportunities | Search Results:

14 of 299 Available Opportunities Found

OPPORTUNITY	ORGANIZATION	WHERE	TIME	DISTANCE	FREQ.
Merchandise Processing & Warehouse Assistant - Resale Outlet	Volunteers of America Oregon	Portland	Open	99+ Miles	Ongoing
Retail Sales Associate - Resale Outlet	Volunteers of America Oregon	Portland	Open	99+ Miles	Ongoing
Skills Trainer & Program Consultant - Resale Outlet	Volunteers of America Oregon	Portland	Open	99+ Miles	Ongoing
Resale Workflow Consultant	Volunteers of America Oregon	Portland	Open	99+ Miles	Ongoing

Overview of the Types of Volunteer Opportunity Postings

Currently, Hands On provides three different "posting types" for volunteer opportunities. When you submit your volunteer opportunities through the Partner Portal, you will need to choose a "Schedule Type" and "Registration Type" to confirm how you would like the opportunity to be posted on the Hands On website. Use the chart below to guide your choice.

Posting Type:	Schedule Type:	Registration Type:
Hands On Managed Calendar Projects Hands On Managed projects are done-in-a-day, date-and-time specific opportunities for which Volunteer Delaware manages the volunteer sign-ups. These opportunities are hands-on, group-based service projects typically lead by a Hands On trained volunteer leader on a weekly, monthly, or quarterly basis. A volunteer can register for this type of opportunity with a click of a button, without further confirmation needed. Our system takes care of sending out automated reminder and follow-up emails to the volunteers signed up for these types of projects. Note that Hands On Managed Calendar Projects require at least a month's notice and are primarily reserved for opportunities that recur multiple times in a year.	Date-and-Time specific	Sign Up
Calendared Referral Opportunities Calendared Referral Opportunities are done-in-a-day, date-and-time specific opportunities that are managed by you, our nonprofit partners. Volunteers can "express interest" in these opportunities with a click of a button and will require follow-up and confirmation from someone at your organization.	Date-and-Time specific	Express Interest
Ongoing / To-Be-Scheduled Referral Opportunities This type of volunteer posting is appropriate for longer-term or skills-based volunteer opportunities that typically require commitment beyond a single done-in-a-day shift. Volunteers "express interest" in these opportunities and will require follow-up and confirmation from someone at your organization.	To-Be-Scheduled	Express Interest

VOLUNTEER DELAWARE

Architecture of a Volunteer Opportunity in Hands On Connect:

Volunteer Opportunity Record

The Volunteer Opportunity record contains over-arching information about the volunteer opportunity, including its description, search criteria, & more.

Location Record

Each volunteer opportunity and occurrence must be linked to a location.

Occurrence Record

Every Volunteer Opportunity is associated with at least one Occurrence. The Occurrence record includes date, time, & registration information, as well as the linked location.

Date-and-Time-Specific opportunities will often have multiple occurrences, each representing a shift.
For To-Be-Scheduled opportunities, the occurrence represents the recruitment period for volunteers.

⇑ **Records created by you, the nonprofit partner**

⇓ **Records created by volunteers / Hands On Connect**

Connection Record

A connection links a volunteer to a given occurrence and is where attendance or follow-through is marked.

Connection Record

A connection links a volunteer to a given occurrence and is where attendance or follow-through is marked.

Connection Record

A connection links a volunteer to a given occurrence and is where attendance or follow-through is marked.

Volunteer Contact Record

Volunteer Contact Record

Volunteer Contact Record

How to Submit a New Volunteer Opportunity: Overview

Submitting a Volunteer Opportunity to the Hands On website requires 5-6 steps:

1. **Confirm or create the project location**
2. **Fill out the Volunteer Opportunity record**
3. **Add the Opportunity Description**
4. **Create an associated Occurrence(s)**
5. **Return to the Volunteer Opportunity and click "Submit"!**

Optional: 6. Add Additional Occurrences (for Date & Time Specific opportunities only)

In the following sections, you will find the process for creating and submitting your volunteer opportunity posting, based on what type of opportunity you are submitting. Because we know that many of our partners tend to focus on one to two types of project types, we have decided to walk through each type of project submission completely – meaning that each section will have some repetitive information. However, this way you will have everything you need to know about posting a single type of opportunity at your fingertips, without having to wade through details only applicable to a different type of posting.

Please refer to **page 12** for an overview of the postings types to determine which is most appropriate for a given opportunity.

BONUS STEP: If you'd like to add **Custom Questions** to your volunteer opportunity, which volunteers will be asked to answer during the sign-up/express interest process, please refer to **page 35**.

Custom Questions can be helpful if you want to get some important information from volunteers right away, such as their availability or proficiency in a certain area (particularly helpful for to-be-scheduled and skills based volunteer opportunities).

I. Submitting a Managed Calendar Project – TAKE THIS OUT????

Managed projects are done-in-a-day, date-and-time specific opportunities for which Volunteer Delaware manages the volunteer sign-ups. These opportunities are hands-on, group-based service projects typically lead by a Hands On trained volunteer leader on a weekly, monthly, or quarterly basis. A volunteer can register for this type of opportunity with a click of a button, without further confirmation needed. *Note that Hands On Managed Calendar Projects require at least a month's notice and are primarily reserved for opportunities that recur multiple times in a year.*

STEPS TO SUBMITTING A HANDS ON MANAGED CALENDAR PROJECT:

1. Confirm or create the project location
2. Fill out the Volunteer Opportunity record
3. Add the Opportunity Description
4. Create an associated Occurrence(s)
5. Return to the Volunteer Opportunity and click "Submit for Approval"
6. (Optional) Adding Additional Project Occurrences

Step 1: Confirm or Create a Location

In Hands On Connect, Locations are listed in their own "record" and then linked to the appropriate volunteer opportunity and occurrence. In order to create a new Volunteer Opportunity Record, the Location Record must already exist, which is why it must be created/confirmed as the first step.

a. **Click on the "Locations" tab**

b. **Find the dropdown menu that says "All Locations"** and **click "Go."** A list of all the locations associated with your organization should appear. (Please note: you'll need to click "Go" to get a complete list of your locations; the list that appears when you click on the "Locations" tab is simply recently viewed locations).

c. **Check to see if the location of your volunteer opportunity is in the list.** If it is, **click on "Edit"** next to the name of the location, to view/modify the Location Record. Confirm that the address is listed correctly and that the **"Special Directions"** section is populated with appropriate arrival/parking/entrance information, as well as close-by public transportation options. Make any edits necessary and click "Save."

d.   **If you don't see your location in the list, click on the "New Location" button** at the top of the list in the blue bar. A new Location record will open. Fill out all of the fields. Make sure the **"Special Directions"** section is populated with appropriate arrival/parking/ entrance information, as well as close-by public transportation options. Click "Save."

e.   **Repeat**, if necessary, to add multiple locations.

Step 2: Fill out the Volunteer Opportunity record

a.   Find the **"Create New…" drop down menu** in the left-hand sidebar, under the Hands On logo.

b.   Choose **Create New: Volunteer Opportunity** to open a new Volunteer Opportunity Record.

c.   Fill out the **Volunteer Opportunity Record form** with as much information as you can. If a field does not appear editable, it means that that information will auto-fill if applicable. *Note that you can mouse-over the yellow-circled question marks for more information about a given field.*

d.   Remember: to denote a Hands On Managed Calendar Project, **Schedule Type** should be **Date & Time Specific** and **Registration Type** should be **Sign-Up**.

Volunteer DELAWARE

Who will manage volunteer sign-ups and communication for this opportunity?

Opportunity Coordinator Name	Peggy Smith	Opportunity Coordinator Email	volunteercoord@nonprofit.c

"Appropriate For" Characteristics

Minimum Age (w/o adult)	16	Suitable for Groups	☑
Minimum Age (w/ adult)	12	Court Ordered Allowed	☑
Maximum Age			

> e.g. families, youth groups, teams, businesses.

Court Ordered: Specifications — Able to work with most court-ordered volunteers. All court-ordered volunteers should be in touch with Peggy Smith, volunteer coordinator, before arriving for their shift. Please email her at: volunteercoord@nonprofit.org

> Please add any specifications or clarification around working with court-ordered volunteers for this opportunity.

Search Characteristics (Please select ALL that apply)

Primary Impact Area	Adult Education
Secondary Impact Area	Civic & Community
Genders Served	All Genders Served

Age Groups Served
- Available: Children & Youth (under 18), Adult (18-65)
- Chosen: All ages

Populations Served
- Available: Animals, Families
- Chosen: Other

Volunteer Activity Type
- Available: Administrative Support/Clerical, Building/Construction, Caring for Animals, Caring for People, Cleaning
- Chosen: Collecting, Sorting & Packaging, Event Organizing, Hotline/Information Center Support, Tutoring

Skill Category
- Available: Animal Services, Art, Culture, Recreations & Sports
- Chosen: Business: Administration and Clerical

Skilled Volunteer Required	No

> Fill out all Search Criteria that apply to ensure that your opportunity shows when a volunteer searches by applicable search terms on the public site.

National & Local Metrics (please select anything that may apply)

National Impact Goals	--None--
National Service Events	--None--
Target Volunteer Groups	--None--
Impact Area (Local)	Multnomah County

Restrictions (only relevant for ongoing or calendared referrals)

Orientation Required	☐
Background Check Required	☐

> Hands On Managed Calendar projects, as a rule, do not have restrictions other than age. If your opportunity requires background checks, etc. it would be better suited as a referral opportunity.

To Edit Description, hit SAVE & find "Add/Change Description" Link in Yellow Box

Description

> You cannot add a Description to the project in this view. You must click "Save" first and then find the "Add/Change Description" link in the yellow Volunteer Opportunity Overview box to add your Volunteer Opportunity Description.

Volunteer Summary

Total Occurrences	0

Save   Save & New   Cancel

Step 3: Add the Opportunity Description

a. **Click on the Add/Change Description link** in the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity Record. (Note: You will not see the yellow box in "Edit" mode; you must save the Volunteer Opportunity Record before you can add the description).

The Volunteer Opportunity Overview keeps track of what has or has not been filled out as you create your volunteer posting.

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)

Verifications Complete

The Volunteer Opportunity **Static Page Editor** should open in a new tab, with space for you to add your description. Note that you can use the toolbar to choose options like bold, italics, underlining, etc. **Volunteer Opportunity Descriptions** are ideally 3-5 paragraphs and include:

* Catchy "hook" to get people reading
* Clear description of volunteer tasks
* What to bring (tools, clothing, food, etc.)
* Equipment volunteers will be using

* Age minimums for volunteers (w/ adult supervision and on their own)
* Any incentives (e.g. food, free entry, etc.)
* Brief description of agency (mission, etc.)

Step 4: Create an associated Occurrence

a. **Find the "Create New" drop down menu** in the left-hand sidebar, under the Hands On logo. Choose **Create New: Occurrence**, and a new Occurrence Record will open.

b. In the Occurrence Record, **look up the associated Volunteer Opportunity** you just created. Click the magnifying glass next to the field and your most "recently viewed" volunteer opportunities should appear in the pop-up Lookup window. Click on the associated Volunteer Opportunity Name (it will likely be first on the list). The Lookup window should close and the Volunteer Opportunity field will be filled automatically.

c. **Look up the associated Location** record using the same method. It should be in your list of most

Pull the corner to make the text box larger!

recently viewed Locations. If not, you can search for it by its name.

d. **Fill out the remaining fields** as required. Note that some of the information you will be asked to fill in will likely be a repeat from the Volunteer Opportunity Record (this is in case some of this information changes from one occurrence to the next). Pay careful attention to how you type in the date & time information, as it must be kept in a specific form.

e. **Hit Save"** once you have filled out all fields.

Date/Time Information (Note: Double check that you list TIME correctly)

| Start Date & Time | 4/23/2011 9:00 AM | [4/4/2011 12:12 AM] | End Date & Time | 4/23/2011 12:00 PM | [4/4/2011 12:12 AM] |

Days & Times Needed

Available
Sunday Morning
Afternoon

Chosen
Saturday Morning
Saturday Afternoon

Save   Save & New   Cancel

Make sure you click "Save"! After you are sure you've saved the description, click "Close."

Make sure the **Start Date & Time** and **End Date & Time** and time is in this exact format. Note that when you choose a date via the "Calendar" function that pops up, it will auto-fill in the current time. Double-check start & end times before clicking save.

Days & Times Needed will automatically fill in based on your chosen date & time for all Calendar projects that occur on a single day.

Step 5: Return to the Volunteer Opportunity and click "Submit for Approval"

a. From the Occurrence record, click on the **Volunteer Opportunity title** to get back to the Volunteer Opportunity record.

b. In the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity record, you should now see that four boxes have now been checked off – Opportunity Created, Occurrence Created, Opportunity Description, and Opportunity Characteristics.

c. Find and click on the "**Submit for Approval**" link next to "Opportunity Published". This will submit the opportunity to us for approval. It usually takes a few days for opportunities to be approved and posted to the website. In the case of Hands On Managed Calendar Projects, we will likely contact you to further discuss the opportunity, since all registration will happen through the Hands On website.

(Optional) Step 6: Add Additional Project Occurrences

For Hands On Managed Calendar Projects that are still in "pending approval" status, you can add additional Occurrences if the opportunity occurs on more than one day or has multiple shifts.

a. Click on the **Volunteer Opportunities** tab in the top horizontal menu bar

b. Click **View All** and find the Volunteer Opportunity for which you'd like to add an Occurrence. Click on the Volunteer Opportunity name to open its **Volunteer Opportunity record**.

c. Scroll down to the related **Occurrences** list to find the occurrence you've already created. **Click on the Occurrence ID** to open that Occurrence Record.

d. Once there, find and click on the **Clone** button at the top of the Occurrence Record. This will open up a new Occurrence record that is identical to the previous Occurrence record.

e. **Edit this new Occurrence record** to include the correct **Date & Time**, and change any other information that might differ from the previous occurrence (e.g. location, Opportunity Coordinator name, attendance, etc.)

f. Click **Save**. You will now be looking at your new Occurrence record.

g. If you need to add yet another Occurrence, you can click Clone at the top of this Occurrence record and make the appropriate changes to add a third Occurrence.

A Note About Editing Hands On Managed Calendar Projects

We are currently working on permissions to allow you to see your Hands On Managed Calendar Projects through the Partner Portal after they have been approved by a Hands On staff member. While you will eventually be able to see them through the Portal and be able to check in on volunteer sign-ups and posting accuracy, the 'edit' option is not available. Because Hands On is in charge of their management, all edits or additional occurrences should be sent to your Hands On staff contact or Hands On Volunteer Leader directly, so that we can make sure that any changes are communicated to the volunteers and leaders signed up on the project.

II. Submitting an "Express Interest" Calendar Referral

Calendared Referral Opportunities are done-in-a-day, date-and-time specific opportunities that are managed by you, our nonprofit partners. Volunteers can "express interest" in these opportunities with a click of a button, and will require follow-up and confirmation from someone at your organization.

STEPS TO SUBMITTING A CALENDAR REFERRAL:

1. Confirm or create the project location
2. Fill out the Volunteer Opportunity record
3. Add the Opportunity Description
4. Create an associated Occurrence(s)
5. Return to the Volunteer Opportunity and click "Submit for Approval"
6. (Optional) Adding Additional Project Occurrences

Step 1: Confirm or Create a Location

In Hands On Connect, Locations are listed in their own "record" and then linked to the appropriate volunteer opportunity and occurrence. In order to create a new Volunteer Opportunity Record, the Location Record must already exist, which it must be created/confirmed first.

a.　　　　　　　**Click on the "Locations" tab** at the top of the screen.

b.　　　　　　　**Find the dropdown menu that says "All Locations"** and **click "Go."** A list of all the locations associated with your organization should appear. (Please note: you'll need to click "Go" to get a complete list of your locations; the list that appears when you click on the "Locations" tab is simply recently viewed locations).

c.　　　　　　　**Check to see if the location of your volunteer opportunity is in the list.** If it is, **click on "Edit"** next to the name of the location, to view/modify the Location Record. Confirm that the address is listed correctly and that the **"Special Directions"** section is populated with appropriate arrival/parking/entrance information, as well as close-by public transportation options. Make any edits necessary and click "Save."

d.   **If you don't see your location in the list, click on the "New Location" button** at the top of the list in the blue bar. A new Location record will open. Fill out all of the fields. Make sure the **"Special Directions"** section is populated with appropriate arrival/parking/ entrance information, as well as close-by public transportation options. Click "Save."

e.   **Repeat**, if necessary, to add multiple locations.

Step 2: Fill out the Volunteer Opportunity record

a.   Find the **"Create New…" drop down menu** in the left-hand sidebar, under the Hands On logo.

b.   Choose **Create New: Volunteer Opportunity**, and a new Volunteer Opportunity Record will open.

c.   Fill out the **Volunteer Opportunity Record form** with as much information as you can. If a field does not appear editable, it means that that information will auto-fill if applicable. *Note that you can mouse-over the yellow-circled question marks for more information about a given field.*

d.   Remember: To indicate an "Express Interest" Calendar Referral, **Schedule Type** should be **Date & Time Specific** and **Registration Type** should be **Express**

Interest.

Who will manage volunteer sign-ups and communication for this opportunity?

Opportunity Coordinator Name	Peggy Smith	Opportunity Coordinator Email	volunteercoord@nonprofit.c

"Appropriate For" Characteristics

Minimum Age (w/o adult)	18	Suitable for Groups	☑
Minimum Age (w/ adult)	16	Court Ordered Allowed	☑
Maximum Age		Court Ordered: Specifications	For this opportunity, we are unable to work with court ordered volunteers whose crime involved theft. Any other court-ordered volunteers are welcome to volunteer; please let us know during the approval process that you would like to have your hours verified for the courts.

> e.g. families, youth groups, teams, businesses.

> Please add any specifications or clarification around working with court-ordered volunteers for this opportunity.

Search Characteristics (Please select ALL that apply)

Primary Impact Area	Adult Education
Secondary Impact Area	--None--
Genders Served	All Genders Served
Age Groups Served	*Available* Children & Youth (under 18), Adult (18-65) — *Chosen* All ages
Populations Served	*Available* Animals, Families — *Chosen* Other
	Populations Served – Available
Volunteer Activity Type	*Available* Administrative Support/Clerical, Building/Construction, Caring for Animals, Caring for People, Cleaning — *Chosen* Event Organizing, Food Preparation & Meal Services
Skill Category	Shelter/FoodBank/Special Event Support, Transportation/Logistics/Supply Chain, Volunteering Management — *Chosen*
Skilled Volunteer Required	No

> Fill out all Search Criteria that apply to ensure that your opportunity shows when a volunteer searches by applicable search terms on the public site.

National & Local Metrics (please select anything that may apply)

National Impact Goals	--None--
National Service Events	--None--
Target Volunteer Groups	--None--
Impact Area (Local)	Multnomah County

Restrictions (only relevant for ongoing or calendared referrals)

Orientation Required	☐
Background Check Required	☐

> If the opportunity requires an orientation or background check, please check the related box so volunteers will know in advance.

To Edit Description, hit SAVE & find "Add/Change Description" Link in Yellow Box

Description

> You cannot add a Description to the project in this view. You must click "Save" first and then find the "Add/Change Description" link in the yellow Volunteer Opportunity Overview box to add your Volunteer Opportunity Description.

Volunteer Summary

Total Occurrences	0

Save   Save & New   Cancel

Step 3: Add the Opportunity Description

a. **Click on the Add/Change Description link** in the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity Record. (Note: You will not see the yellow box in "Edit" mode; you must save the Volunteer Opportunity Record before you can add the description).

The Volunteer Opportunity Overview keeps track of what has or has not been filled out as you create your volunteer posting.

HandsOn Connect Shortcuts

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)

☐ Verifications Complete

b.   The Volunteer Opportunity **Static Page Editor** should open in a new tab, with space for you to add your description. Note that you can use the toolbar to choose options like bold, italics, underlining, etc. **Volunteer Opportunity Descriptions** are ideally 3-5 paragraphs and include:

* Catchy "hook" to get people reading
* Clear description of volunteer tasks
* What to bring (tools, clothing, food, etc.)
* Equipment volunteers will be using

* Age minimums for volunteers (w/ adult supervision and on their own)
* Any incentives (e.g. food, free entry, etc.)
* Brief description of agency (mission, etc.)

Static Page Editor   Save   Close

Join in the fun at this year's Wizard Gala, which will work its magic to raise money for up to 200 local nonprofits!

We're looking for up to 20 day-of-event volunteers to help with everything from set-up to registration, auction, food service, and more. If you love events, enjoy working with people, and have a friendly twinkle in your eye, we'd love to have you! All volunteers get to wear a fun wizard hat and robe (provided) and enjoy the dinner free of charge.

Shifts include:

• Set-up & registration: 5:00pm – 7:30pm
• Food support: 6:00pm – 8:30pm
• Auction support: 5:00pm – 8:00pm
• Clean up crew: 7:30pm – 9:00pm

Make sure you click "Save"! After you are sure you've saved the description, click "Close."

Pull the corner to make the text box larger!

Save   Close

Step 4: Create an associated Occurrence

a.   **Find the "Create New" drop down menu** in the left-hand sidebar, under the Hands On logo. Choose **Create New: Occurrence**, and a new Occurrence Record will open.

b.   In the Occurrence Record, **look up the associated Volunteer Opportunity** you just created. Click the magnifying glass next to the field and your most "recently viewed" volunteer opportunities should appear in the pop-up Lookup window. Click on the associated Volunteer Opportunity Name (it will likely be first on the list). The Lookup window should close and the Volunteer Opportunity field will be filled automatically.

c.   **Look up the associated Location** record using the same method. It should be in your list of most recently viewed Locations. If not, you can search for it by its name.

d.   **Fill out the remaining fields** as required. Note that some of the information you will be asked to fill in will likely be a repeat from the Volunteer Opportunity Record (this is in case some of this information changes from one occurrence to the next). Pay careful attention to how you type in the date & time information, as it must be kept in a specific form.

e.   **Hit Save"** once you have filled out all fields.

Make sure the **Start Date & Time** and **End Date & Time** and time is in this exact format. Note that when you choose a date via the "Calendar" function that pops up, it will auto-fill in the current time. Double-check start & end times before clicking save.

Days & Times Needed will automatically fill in based on your chosen date & time for all Calendar projects that occur on a single day.

VOLUNTEER DELAWARE

Step 5: Return to the Volunteer Opportunity and click "Submit for Approval"

a. From the Occurrence record, click on the **Volunteer Opportunity title** to get back to the Volunteer Opportunity record.

b. In the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity record, you should now see that four boxes have now been checked off – Opportunity Created, Occurrence Created, Opportunity Description, and Opportunity Characteristics.

c. Find and click on the "**Submit for Approval**" link next to "Opportunity Published". This will submit the opportunity to us for approval. It usually takes a few days for opportunities to be approved and posted to the website. In the case of Hands On Managed Calendar Projects, we will likely contact you to further discuss the opportunity, since all registration will happen through the Hands On website.

Volunteer Opportunity Overview

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

✓	Opportunity Created		✓ Opportunity Description	Add/Change Description
✓	Occurrence Created	Create New Occurrence	✓ Opportunity Characteristics (Optional – Improves Search and Metrics)	
	Recurrence Created	Create New Recurrence	Opportunity Published (Status: Pending)	Submit for Approval
			✓ Verifications Complete	

Total Active Occurrences: 0   Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, click here to get started.

(Optional) Step 6: Adding Additional Project Occurrences

If your Calendared Referral falls across multiple days, you can add additional Occurrences. Please note that we limit Calendared Referrals to one occurrence per day, so if you have multiple shifts in a single day, you will need to include shift times in the Project Description and choose a start and end date for your Occurrence that encompasses the full timeframe when you are looking for volunteers.

a. Click on the **Volunteer Opportunities** tab in the top horizontal menu bar

b. Click **View All** and find the Volunteer Opportunity for which you'd like to add an Occurrence. Click on the Volunteer Opportunity name to open its **Volunteer Opportunity record**.

c. Scroll down to the related **Occurrences** list to find the occurrence you've already created. **Click on the Occurrence ID** to open that Occurrence Record.

d. Once there, find and click on the **Clone** button at the top of the Occurrence Record. This will open up a new Occurrence record that is identical to the previous Occurrence record.

Occurrence Detail   Edit   Clone   Print Check-In Sheet

HandsOn Connect Shortcuts

Occurrence Overview

Here's your at-a-glance view of this Occurrence.

☐ Occurrence Published (Status: Pending)   Submit for Approval

e. **Edit this new Occurrence record** to include the correct **Date & Time**, and change any other information that might differ from the previous occurrence (e.g. location, Opportunity Coordinator name, attendance, etc.)

f. Click **Save**. You will now be looking at your new Occurrence record.

g. If you need to add yet another Occurrence, you can click Clone at the top of this Occurrence record and make the appropriate changes to add a third Occurrence.

III. Submitting an Ongoing / To-Be-Scheduled Referral Opportunity

This type of volunteer posting is appropriate for longer-term or skills-based volunteer opportunities that typically require commitment beyond a single done-in-a-day shift. Volunteers "express interest" in these opportunities and will require follow-up and confirmation from someone at your organization.

STEPS TO SUBMITTING AN ONGOING / TO-BE-SCHEDULED OPPORTUNITY:

1. Confirm or create the project location
2. Fill out the Volunteer Opportunity record
3. Add the Opportunity Description
4. Create an associated Occurrence(s)
5. Return to the Volunteer Opportunity and click "Submit for Approval"

Step 1: Confirm or Create a Location

In Hands On Connect, Locations are listed in their own "record" and then linked to the appropriate volunteer opportunity and occurrence. In order to create a new Volunteer Opportunity Record, the Location Record must already exist, which it must be created/confirmed first.

> **NOTE:** Many Ongoing / To-Be-Scheduled Opportunities take place at multiple locations. If you would prefer, you can create a location called "Multiple Locations: TBD" to communicate that the opportunity takes place in a variety of locations. The system will still force you to choose a zipcode. Another option is to link the volunteer opportunity to a common location, but explain in the body of the Volunteer Opportunity Description that the opportunity takes place in a variety of locations.

a.   **Click on the "Locations" tab** at the top of the screen.

b.   **Find the dropdown menu that says "All Locations"** and **click "Go."** A list of all the locations associated with your organization should appear. (Please note: you'll need to click "Go" to get a complete list of your locations; the list that appears when you click on the "Locations" tab is simply recently viewed locations).

c.   **Check to see if the location of your volunteer opportunity is in the list.** If it is, **click on "Edit"** next to the name of the location, to view/modify the Location Record. Confirm that the address is listed correctly and that the **"Special Directions"** section is populated with appropriate arrival/parking/entrance information, as well as close-by public

transportation options. Make any edits necessary and click "Save."

d.   **If you don't see your location in the list, click on the "New Location" button** at the top of the list in the blue bar. A new Location record will open. Fill out all of the fields. Make sure the **"Special Directions"** section is populated with appropriate arrival/parking/ entrance information, as well as close-by public transportation options. Click "Save."

e.   **Repeat**, if necessary, to add multiple locations.

Step 2: Fill out the Volunteer Opportunity record

a.   Find the **"Create New…" drop down menu** in the left-hand sidebar, under the Hands On logo.

b.   Choose **Create New: Volunteer Opportunity**, and a new Volunteer Opportunity Record will open.

c.   Fill out the **Volunteer Opportunity Record form** with as much information as you can. If a field does not appear editable, it means that that information will auto-fill if applicable. *Note that you can mouse-over the yellow-circled question marks for more information about a given field.*

d.   Remember: To indicate an "Express Interest" Calendar Referral, **Schedule Type** should be **Date & Time Specific** and **Registration Type** should be **Express**

Click on the magnifying glass – before typing anything – to look up the related Location Record. Your recently viewed locations should show up automatically.

Schedule Type should be "To Be Scheduled"

Registration Type should be "Express Interest"

Max Attendance for an Ongoing Referral refers to total number of "Confirmed" volunteers you want – not the total number of volunteers who can express interest. The project will only be closed to further interest inquiries once you have confirmed enough volunteers to meet your Max Attendance.

Interest.

Who will manage volunteer sign-ups and communication for this opportunity?

| Opportunity Coordinator Name | Peggy Smith | Opportunity Coordinator Email | volunteercoord@nonprofit.c |

"Appropriate For" Characteristics

Minimum Age (w/o adult)	18	Suitable for Groups	☑
Minimum Age (w/ adult)	16	Court Ordered Allowed	☑
Maximum Age			

e.g. families, youth groups, teams, businesses.

Court Ordered: Specifications — For this opportunity, we are unable to work with court ordered volunteers whose crime involved theft. Any other court-ordered volunteers are welcome to volunteer; please let us know during the approval process that you would like to have your hours verified for the courts.

Please add any specifications or clarification around working with court-ordered volunteers for this opportunity.

Search Characteristics (Please select ALL that apply)

Primary Impact Area	Adult Education
Secondary Impact Area	--None--
Genders Served	All Genders Served

Age Groups Served
Available: Children & Youth (under 18), Adult (18-65)
Chosen: All ages

Populations Served
Available: Animals, Families
Chosen: Other
Populations Served – Available

Volunteer Activity Type
Available: Administrative Support/Clerical, Building/Construction, Caring for Animals, Caring for People, Cleaning
Chosen: Event Organizing, Food Preparation & Meal Services

Skill Category
Shelter/FoodBank/Special Event Support, Transportation/Logistics/Supply Chain, Volunteering Management
Chosen:

Skilled Volunteer Required: No

Fill out all Search Criteria that apply to ensure that your opportunity shows when a volunteer searches by applicable search terms on the public site.

National & Local Metrics (please select anything that may apply)

National Impact Goals	--None--
National Service Events	--None--
Target Volunteer Groups	--None--
Impact Area (Local)	Multnomah County

Restrictions (only relevant for ongoing or calendared referrals)

| Orientation Required | ☐ |
| Background Check Required | ☐ |

If the opportunity requires an orientation or background check, please check the related box so volunteers will know in advance.

To Edit Description, hit SAVE & find "Add/Change Description" Link in Yellow Box

Description

Volunteer Summary

Total Occurrences   0

Save   Save & New   Cancel

You cannot add a Description to the project in this view. You must click "Save" first and then find the "Add/Change Description" link in the yellow Volunteer Opportunity Overview box to add your Volunteer Opportunity Description.

Step 3: Add the Opportunity Description

c. **Click on the Add/Change Description link** in the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity Record. (Note: You will not see the yellow box in "Edit" mode; you must save the Volunteer Opportunity Record before you can add the description).

The Volunteer Opportunity Overview keeps track of what has or has not been filled out as you create your volunteer posting.

HandsOn Connect Shortcuts

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)

☐ Verifications Complete

d.   The Volunteer Opportunity **Static Page Editor** should open in a new tab, with space for you to add your description. Note that you can use the toolbar to choose options like bold, italics, underlining, etc. **Volunteer Opportunity Descriptions** are ideally 3-5 paragraphs and include:

* Catchy "hook" to get people reading
* Clear description of volunteer tasks
* What to bring (tools, clothing, food, etc.)
* Equipment volunteers will be using

* Age minimums for volunteers (w/ adult supervision and on their own)
* Any incentives (e.g. food, free entry, etc.)
* Brief description of agency (mission, etc.)

Static Page Editor   Save   Close

Calling all website surfers and internet-ophiles! Bring your surfing skills and attention to detail to Hands On!

Hands On Greater Portland just launched its new website, which is poised to connect more volunteers than ever to hundreds of volunteer opportunities. However, we're still making improvements along the way. We are looking for up to 10 volunteers to come in and navigate the site to test its useability, using special mouse-tracking software. This will help give us useful information on how volunteers engage with our website. Ideally, you are still rather new to the website or haven't yet explored it too deeply.

Shifts are flexible and last about two hours. We have two computers available on Tuesday and Thursday afternoons between 1pm and 3pm from now through the end of April. Please let us know what days you are available when you express interest.

Make sure you click "Save"! After you are sure you've saved the description, click "Close."

Save   Close

Pull the corner to make the text box larger!

Step 4: Create an associated Occurrence

Even Ongoing / To-Be-Schedule opportunities must have an associated Occurrence. Instead of representing a specific date or shift, the ongoing opportunity Occurrence represents the recruitment period during which the project will be live on the Hands On website and volunteers can express interest. The Start Date refers to the date you want to start recruiting for the project, and the End Date is the date the Volunteer Opportunity is no longer visible to potential volunteers.

f. **Find the "Create New" drop down menu** in the left-hand sidebar, under the Hands On logo. Choose **Create New: Occurrence**, and a new Occurrence Record will open.

g. In the Occurrence Record, **look up the associated Volunteer Opportunity** you just created. Click the magnifying glass next to the field and your most "recently viewed" volunteer opportunities should appear in the pop-up Lookup window. Click on the associated Volunteer Opportunity Name (it will likely be first on the list). The Lookup window should close and the Volunteer Opportunity field will be filled automatically.

h. **Look up the associated Location** record using the same method. It should be in your list of most recently viewed Locations. If not, search for it by its name.

i. **Fill out the remaining fields** as required. Note that some of the information you will be asked to fill in will likely be a repeat from the Volunteer Opportunity Record (this is in case some of this information changes from one occurrence to the next). Pay careful attention to how you type in the date & time information, as it must be kept in a specific form.

j. **Hit Save"** once you have filled out all fields.

Make sure the **Start Date & Time** and **End Date & Time** and time is in this exact format. Note that when you choose a date via the "Calendar" function that pops up, it will auto-fill in the current time, which is fine to leave for an Ongoing Referral.

Please fill out Days & Times Needed with all possible days/times that this opportunity could use volunteers. Double click to choose.

Step 5: Return to the Volunteer Opportunity and click "Submit for Approval"

d. From the Occurrence record, click on the **Volunteer Opportunity title** to get back to the Volunteer Opportunity record.

e. In the yellow **Volunteer Opportunity Overview** box at the top of the Volunteer Opportunity record, you should now see that four boxes have now been checked off – Opportunity Created, Occurrence Created, Opportunity Description, and Opportunity Characteristics.

f. Find and click on the "**Submit for Approval**" link next to "Opportunity Published". This will submit the opportunity to us for approval. It usually takes a few days for opportunities to be approved and posted to the website. In the case of Hands On Managed Calendar Projects, we will likely contact you to further discuss the opportunity, since all registration will happen through the Hands On website.

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: 0   Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, click here to get started.

Adding Custom Questions to a Volunteer Opportunity:

In Hands On Connect, you have ability to ask a few questions of volunteers before they sign up or express interest in your opportunity. This can be helpful if you want to get some important information from volunteers right away, such as their availability or proficiency in a certain area (particularly helpful for to-be-scheduled and skills based volunteer opportunities).

Common examples of questions that might be useful to ask during the volunteer sign-up/express interest process:

- Can you bring _____ (your own gloves, tools, other supplies, a food item, etc.)? Please specify.
- What days and times are you interested in coming in to help out?
- How proficient are you in _____ ? Please explain.

To Add a Custom Question:

a. Click on the **Volunteer Opportunities** tab in the top horizontal menu bar and select **View All** in the drop down menu. Find the Volunteer Opportunity to which you'd like to add a custom question. Click on the Volunteer Opportunity name to open its **Volunteer Opportunity record**.

b. Scroll down to the related **Questions** section toward the bottom of the page. Click on **New Question** to create a new question.

c. A new **Question record** should open for editing, with the related Volunteer Opportunity name already linked in the Volunteer Opportunity field. If it isn't, use the "look-up" magnifying glass to associate the question with the correct Volunteer Opportunity.

d. Add your custom question in the **Question** field and click **Save**

Editing & Updating Your "Express Interest" Volunteer Opportunities

e. Click on the **Volunteer Opportunities** tab. Make sure "**All Volunteer Opportunities**" is selected in the drop down "View" at the top of the page, and click **Go**. From there, click on the name of the Volunteer Opportunity you want to edit. From here, you can edit your Volunteer Opportunity in a couple ways:

f. **To edit everything except the description**, click **Edit** at the top of the page, make the changes and then click **Save**.

g. If you are editing a volunteer opportunity that was moved over from our old system, note that you will now be forced to update certain required fields. You will need to select a **Primary Impact Area, Genders Served,** & **Age Groups Served** before you can save your edits. Please confirm that any other applicable Search Characteristics are also filled out – this will improve the chances of your volunteer opportunity coming up in a volunteer's search results.

h. **To edit the project description,** click the **Change Description** link under the yellow box. The Description pop-up editor will open in a new tab or window. Make your changes, then click **Save** and then **Close**.

Deactivating a Volunteer Opportunity

If the opportunity is a Hands On Managed Calendar Project, please contact us if you have to cancel a shift.

If the opportunity is an "Express Interest" Calendar referral or Ongoing/To-Be-Scheduled Opportunity, all you need to do to deactivate the opportunity is to change the **Status** of the related **Occurrence record** to **Inactive** and hit **Save.**

If you want to relist the project at a future point, you can change the Status back to Active. For an Ongoing volunteer opportunity, you will also need to change the **End Date** in both the Volunteer Opportunity Record and the related Occurrence Record to a future date. The End Date should be the date that you would like stop volunteer recruitment and have the opportunity to come down from the Hands On website. Note that we post Ongoing Opportunities for up to six months at a time; after six months, we will ask you to check for accuracy and repost the opportunity again to confirm that you would like it to stay active.

Please note that deletion of volunteer opportunities is not an option, as deleting an opportunity would delete all associated volunteer connections and volunteer history. If you want to delete an opportunity that you have just created that is not yet associated with any volunteer sign-ups, contact us with your request.

If you have duplicate volunteer opportunities in the system that you would like to merge together, please contact us and we can look into helping you streamline the opportunities in your account.

Managing Your Volunteer Opportunities: Hands On Managed Calendar Projects

VOLUNTEER SIGN-UPS & COMMUNICATION:

The beauty of the Hands-On Managed Calendar Project is that we take care of managing volunteer sign-ups, reminders, and follow-up for you. Our Hands On Managed Volunteer Leaders are trained to take on this role, and our system is designed to sign volunteers up and send out project reminders automatically. You can check up on how your project sign-ups are doing through the website, and if you have any messages you'd like to relay to volunteers prior to the project, you can pass those along to your Volunteer Leader to send out to the volunteers.

AUTOMATED EMAILS:

The Hands On Connect system is programmed to send out a handful of automated emails to both the volunteers and the designated Hands On Volunteer Leader for a Hands On Managed Calendar Project. Because volunteer sign-ups for Hands On Managed calendar projects are managed completely through the Hands On website with the help of a volunteer leader, there are no automated emails designed to go to your agency-designated Opportunity Coordinator, unless your agency contact is also serving as the Hands On Volunteer Leader.

To the Hands On Volunteer Leader:

Notification of volunteer signups – For Sign-Up projects, volunteer leaders will receive an email to let them know when a volunteer signs up for an occurrence.

Notification of volunteer removals - For Sign-Up projects, volunteer leaders will receive an email to let them know when a volunteer removes themselves from an occurrence.

Reminder to Report Attendance and Service Hours - Once an occurrence has passed, volunteer leaders will receive an email to remind them to report attendance for your project.

To the volunteers on a Hands On Managed project:

Opportunity Signup Confirmation - Confirmation email sent to a volunteer after signup, which includes more information about the project, such as the exact location and driving directions.

Waitlisted Opportunity Now Open – E-mail sent to all waitlisted volunteers when an opportunity opens up again.

Opportunity Reminder – Reminder sent to all volunteers who are signed up for date and time specific. Sent 4 days before the start date of the occurrence.

Post Opportunity Thank You - Thank you email sent the day after the project occurrence, which also asks volunteers to report feedback through the Hands On

Connect system.

FOLLOW UP & MARKING ATTENDANCE:

Our Hands On Volunteer Leaders are trained to follow up with volunteers after the project and to mark attendance for the occurrence through Hands On Connect. Unless you are filling in as the Hands On Volunteer Leader on the project, this is not something you have to do. If you have a "thank you" you'd like to pass along to the volunteers, please forward it to your Volunteer Leader, who can then send it to the project attendees.

Managing Your Volunteer Opportunities: "Express Interest" Opportunities
(i.e. Calendar Referrals & Ongoing/To-Be-Scheduled Opportunities)

Managing volunteer interest in your Express Interest opportunities (e.g. Calendar Referrals and Ongoing/To-Be-Scheduled Opportunities) involves four steps:

1. Notification of Volunteer Interest
2. Follow up with interested volunteers
3. Confirm (or decline) volunteers in Hands On Connect
4. Verify attendance in Hands On Connect after the opportunity is complete

Step 1: Notification of Volunteer Interest

When a volunteer expresses interest in your opportunity, you (or whomever is listed as the Opportunity Coordinator) will receive an email to let you know, with the subject line "A volunteer has expressed interest - please respond." The email will include contact information for the volunteer and request that you respond to the interest inquiry within a couple days, as well as "Confirm" the volunteer through Hands On Connect once they have been confirmed for the shift.
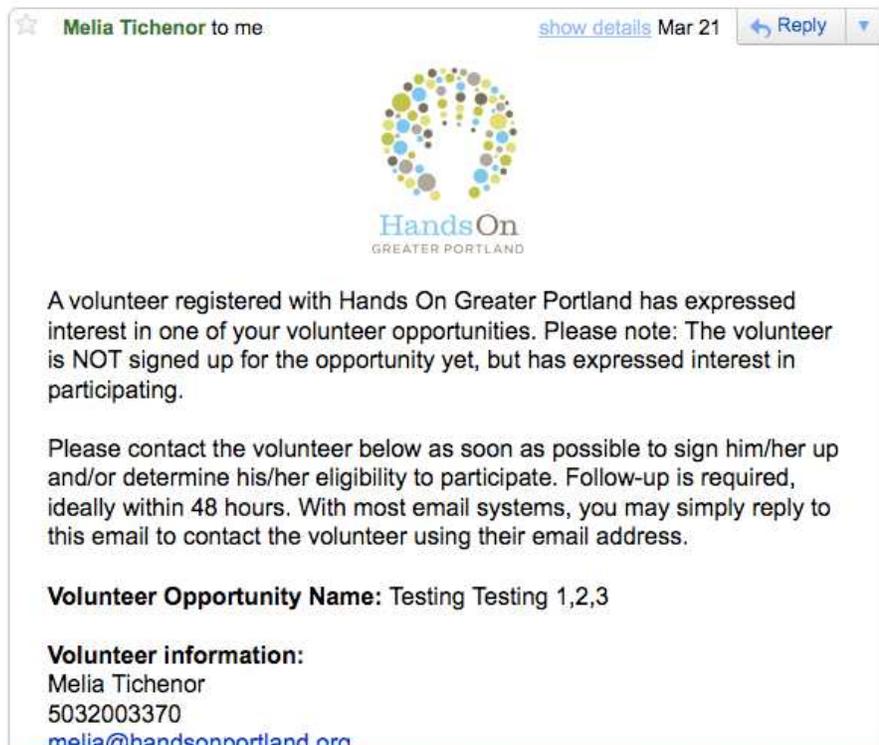
Step 2: Follow up with interested volunteers

Once you receive a notification of volunteer interest, it is then up to you to get in touch with that volunteer via email or phone to provide more information about the opportunity and confirm them for a shift (assuming they meet the requirements of the volunteer opportunity). This is the most important step! Remember, volunteers have only expressed interest in the opportunity; they are not signed up until you follow up with them and confirm.

If you added **custom questions** to your volunteer opportunity for volunteers to answer when they expressed interest in the opportunity, it is often helpful to look at their answers before getting in touch with them. We hope to eventually include this information in the "notification of volunteer interest" email you receive, but for now, you can find their answers this way:

a. Within the Partner Portal, click on the **Reports** tab in the horizontal menu bar.
b. Click on the Report named **Volunteer Connections: Questions/Answers.** You will see a list of all recent Volunteer Connections that include an Answer to a custom question, organized by Volunteer Opportunity. The answers are listed in the far right-hand column.

Within the Volunteer Opportunity, you can sort by "**Contact: Full Name**" (by clicking on the column heading name) to group all Answers for a given volunteer. Note that this list only provides a snapshot of Questions/Answer for currently active or very recently inactive Volunteer Opportunities.

Generated Report:

Filtered By:
End Date greater than LAST MONTH

Occurrence ID	Start Date & Time	End Date & Time	Location: Location Name	Connection Id	Contact: Full Name	Contact Email	Contact Phone	Status	Guest Volunteers	Question: Question ID	Question: Question	Answer
Volunteer Opportunity Name: <u>Love the Internet? Be a Website Tester for Hands On! (Ongoing Opportunity)</u> (2 records)												
OC-100702	2/27/2011 12:00 AM	5/31/2011 12:00 AM	Testing Center	CO-465399	Hands On PDX Volunteer	handsonpdxconnect@gmail.com	(503) 999-9955	Confirmed	0	QU-000027	How much time do you spend browsing websites each week?	I tend to spend 1-2 hours per day browsing the internet, so 7-14 hours per week.
OC-100702	2/27/2011 12:00 AM	5/31/2011 12:00 AM	Testing Center	CO-465399	Hands On PDX Volunteer	handsonpdxconnect@gmail.com	(503) 999-9955	Confirmed	0	QU-000028	Please tell us your availability within the next month. Shifts are Tuesday and Thursday afternoons from 1pm -3pm.	I am available the first two Thursdays in April. 1-3pm works great.

Step 3: Confirm (or decline) volunteers in Hands On Connect

The new Hands On Connect system is built so that you can easily track which volunteers you have confirmed for an "Express Interest" opportunity and which volunteers have been declined. Volunteers will be able to check on the status of any opportunities they have expressed interest in through their Hands On Account. What do these terms mean, exactly?

Confirmed: A Confirmed volunteer connection represents a volunteer who is officially signed up to volunteer for the opportunity. It means you have been in touch with the volunteer and confirmed them for a shift. In the case of an Ongoing/To-Be-Scheduled opportunity, a connection should be confirmed if the volunteer has been scheduled for their first shift or orientation session.

Declined: A Declined volunteer connection represents a volunteer who is NOT signed up to volunteer for the opportunity, either because they did not meet the necessarily qualifications, they never got back to you, or the volunteer realized that they were unable to volunteer and removed themselves.

Pending Approval: Any volunteer connection which has not yet been Confirmed or Declined will be listed as "Pending Approval".

To Confirm or Decline a volunteer for an Opportunity:

a. Use the **Search box** to search for the name of the related volunteer opportunity. Once you have found the Opportunity, click on the title to go the **Volunteer Opportunity Record.**

b. Scroll down the related Occurrences list and click on the appropriate **Occurrence ID**. If you have more than one Occurrence for a given Calendar Referral, refer to the Start and End Date & Time to determine the correct Occurrence.

c. Once you are in looking at the Occurrence record, scroll down until you see two Connections boxes, which list the volunteer connections associated with your occurrence. Each "connection" represents a volunteer sign-up in Hands On Connect and is referenced by its ID number, in the form CO-######.

The first box will contain all of the Pending and Declined Connections for a given opportunity. Locate the name of the volunteer who you would like to Confirm or Decline and check the checkbox next to their Connection ID.

d. To mark a volunteer as Confirmed after selecting the checkbox by their name, simply click the **Mark Confirmed** button at the top of the Pending/Declined Connections box and the Connection will automatically move down to the Confirmed Connections box. Its Attendance **Status** will be changed to "**Please Verify**" to remind you to follow up after the opportunity has passed to mark whether or not the volunteer attended.

e. To mark a volunteer as Declined (if they don't meet requirements or never got back to you), please click the **Mark Declined** button. In doing so, you will need to chose a reason.
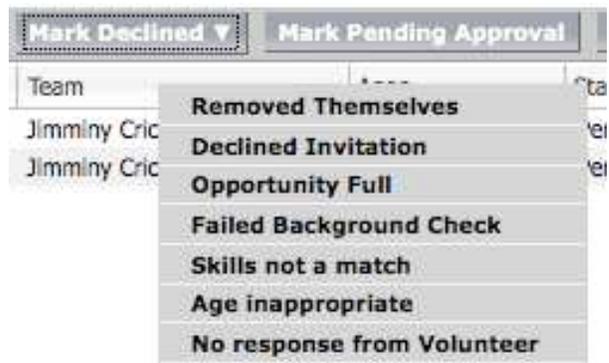
Step 4: Verifying Attendance after the opportunity or initial shift is complete

It is important to verify that a volunteer has (or has not) followed through on an "Express Interest" volunteer opportunity, both for your knowledge, our knowledge, and for the volunteer's record. For both your organization and for Volunteer Delaware, it is incredibly helpful to see how many volunteers actually follow through and volunteer after expressing interest in an opportunity. For the volunteer, verification of attendance will be reflected in their Hands On Account, so that they can easily see which volunteer opportunities they have actually participated in.

To verify attendance, use the instructions in Step 3 to find the Occurrence for which you'd like to verify attendance. Remember, on-going opportunities have an Occurrence too, which represents the recruitment window for the opportunity instead of a specific date & time.

a. **For Date & Time Specific Calendar Referrals** it's easy to verify attendance for all volunteers right after the volunteer opportunity occurrence has passed. Check the checkboxes next to all volunteers who attended, click on the **Mass Action** button at the top of box, and choose **Mark as Attended**. Then, check the remaining boxes next to the volunteer who did not attend and, click on the **Mass Action** button, and choose **Mark as Unattended**.

b. **For Ongoing/To-Be-Schedule Opportunities**, before marking a volunteer as Attended, you'll want to input the **Start and End date and time** of the volunteer's first shift. By default, in the Confirmed Connections box, Hands On Connect will list the start time for all To-Be-Scheduled connections as the current date & time (i.e. now) and the End date/time will be blank. Please enter a Start and End date/time in the exact format you see below.

Then, mark the applicable volunteer as Attended by clicking the checkbox by their connection ID and choosing **Mass Action** > **Mark As Attended**.

If you never heard back from a volunteer or they do not meet the requirements of your position, you can mark them as Unattended at anytime. Click the checkbox by their connection ID and choose **Mass Action > Mark As Unattended.**