

Volunteer User Guide



v4.2

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The Trustees
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Dear Volunteer:

Whether you are new to The Trustees or you have been with us for many years, thank you for your important contribution and your precious time to provide your volunteer services to The Trustees.

The Trustees has a deep history in altruistic efforts. Charles Eliot, our founder, first proposed a board of volunteer trustees in 1890, with the first board officially meeting a year later. Even in the late 19th century, Eliot recognized the need to connect individuals to these special places. While there are many ways to connect to a place, there may be no stronger bond builder than volunteering.

Volunteers, no matter what cause you are working for, are an optimistic bunch. You dedicate your free time to better your community . . . locally, nationally, and beyond. With as much work as we must do, we need you to be both the engine and the fuel to get our work done. One day or reoccurring, working solo or with others, every volunteer represents opportunities to enact positive change.

From an organizational standpoint, volunteers also represent the community we hope to serve. You are our friends and neighbors, dog walkers and leaf peepers, locals and internationals. By engaging with you directly in our work, we all realize, together, the importance of special places and the value each unique space holds. Regardless if you are completing simple tasks or participating in large scale projects, your engagement is our mission in action.

Warmly,

The Volunteer Team
Volunteer@TheTrustees.org

GETTING STARTED

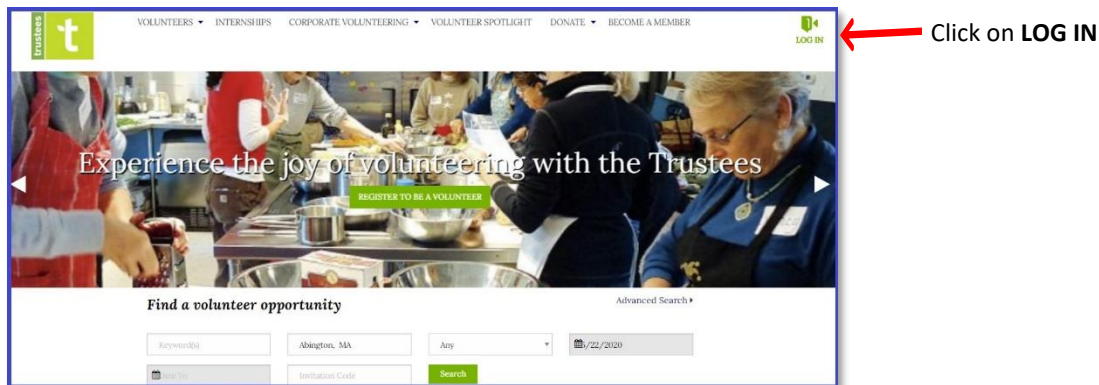
One of the first things that volunteers should do is create a profile on our volunteer site, <https://volunteer.thetrustees.org/>. Through this profile, you will be able to:

- Search for volunteer opportunities (p. 8)
- Sign-up or express interest for volunteer opportunities (p. 11)
- Record your volunteer hours (p. 12)

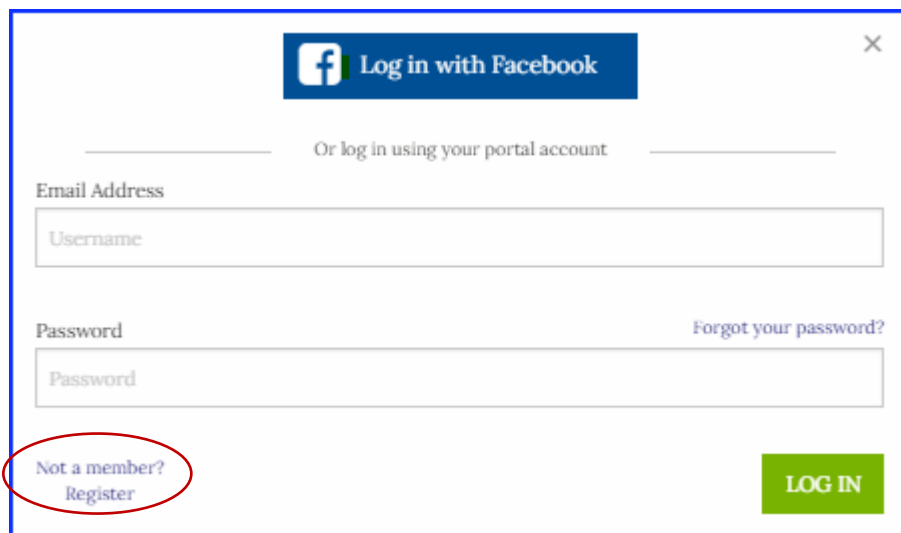
VOLUNTEER REGISTRATION & ACCOUNT CREATION

If you have volunteered with The Trustees before, you likely have already registered and created a volunteer account. If that's the case, please go to p. 6. If you do not have a Trustees volunteer account, you can create one. The account will allow you to register for volunteer opportunities.

To create your Volunteer Account:



Click on ***Not a member? Register***




This area registers your basic info. Anything with an asterisk * is a required field.

Register for a Volunteer Account

Please tell us a little about yourself.

- Your birthdate is required because most opportunities require volunteers to be over 18.
- Address information will be used to reach out to volunteers when a local need arises.

Or  Register with ... Facebook

BASIC INFO

First Name *

Last Name *

Date of Birth *

Please provide all **Contact Info** in this area.

CONTACT INFO

Home Street *

Home City *

Home State *

Home ZIP *

Home Phone

Mobile Phone

This information will serve as your **Log in Information** when you return to the site. Your email becomes your log in ID.

LOG IN INFORMATION

Email Address *

Confirm Email Address *

Password *

Confirm Password *

Yes, I'd like to receive communications from The Trustees of Reservations.

You have the option to provide more information about yourself, your availability and your interests.

DEMOGRAPHIC AND VOLUNTEER OPTIONS +

VOLUNTEER AVAILABILITY + VOLUNTEER INTERESTS +

Click Next to Continue the registration process

Next >

Click **Next >**

Please read the *Volunteer Liability Waiver*

Then:

1. Check ***I agree***, indicating you have read and agree to the waiver.
2. Provide a name and contact number for an Emergency Contact.

By checking the box below, I express my understanding and intent to enter into this Release and Waiver of Liability willingly and voluntarily.

Volunteer Registration

I agree *

Emergency Contact Name *
Please provide first and last name.

Emergency Contact Phone *
Please provide the best contact number to reach your emergency contact.

< Back Finish >

Click **Finish >**

Your account is created, and you will receive a welcome email!

ACCESSING YOUR VOLUNTEER ACCOUNT

If you have volunteered with The Trustees before you likely have registered and created a Volunteer Account. Your username is your email address.



Click on **LOG IN**

The screenshot shows the login form on the Trustees website. At the top, there is a 'Log in with Facebook' button. Below it, the text 'Or log in using your portal account' is displayed. The form has two input fields: 'Email Address' (with a placeholder 'Username') and 'Password'. A 'Forgot your password?' link is located to the right of the password field. At the bottom left, there is a link for 'Not a member? Register'. At the bottom right, there is a green 'LOG IN' button.

Type in your **Email Address**

Type in your **Password**

Click **LOG IN**

If you do not remember your password, click on the ***Forgot your password?*** to have a reset link sent to your email. The link will expire in 24 hours.

MANAGING YOUR ACCOUNT

Once you have registered and logged into the site, you are given immediate access to your volunteer account.

When you first log in you will be taken to the **Account Overview** page. Here you'll see:

- A total of all your verified hours of service.
Verified Hours are those hours which staff have reviewed and approved.
Unverified Hours are those hours which you have reported but are awaiting staff approval. This is also where you will see hours you've reported that *did not* take place at a Trustees Property.
- **Upcoming Opportunities:** scrollable, sortable list of your upcoming opportunities. Click on column headers to sort.
 - Link to the opportunity detail page.
 - Info on your sign-up status. Hyperlinks to "remove me" -- remove yourself from the opportunity; "location details" -- opens a page with full details on the location; Add to Calendar.

The screenshot shows the 'Account Overview' page for a user named Kiyosa Small. At the top right, there are navigation links: VOLUNTEERS, INTERNSHIPS, CORPORATE VOLUNTEERING, VOLUNTEER SPOTLIGHT, DONATE, and BECOME A MEMBER. The user's profile shows 2 Verified Hours and 0 Unverified Hours. Below this, there is a section for 'Upcoming Opportunities' with a table containing one entry: 'Friday Farm Dinners & Other Events - Powhatch Farm' at 'Charles River Valley' on '9/25/2020 5:00 PM'. The table has columns for Opportunity, Organization, When, and Action/Status. Below that is a section for 'Volunteer History with The Trustees of Reservations' with a table containing one entry: 'Property Steward - deCordova' at 'deCordova Museum' on '5/1/2020 8:30 AM' for 2 hours, with a status of 'Verified'. The table has columns for Opportunity, Organization, Date, Hours, and Action/Status. At the bottom, there is a section for 'Self-Reported Hours' with a similar table structure.

- **Volunteer History:** lists all your past connections. Those opportunities where you have had attendance and service verified will appear with the word **Verified** underneath the hours served.
 - Volunteers should make note of the name of prior volunteer opportunities. These are the names to be used for future Self-Reporting Your Volunteer Service.
 - Hyperlinks to provide feedback and to print volunteer history

OPPORTUNITY SEARCH

There are a variety of ways to find Opportunities. The Trustees Volunteer [Home](#) page shows the upcoming opportunities with a description as well as their location on a map.

Upcoming Volunteer Opportunities

Map Satellite

Program Assistant - Rocky Woods
Overview Overview: In the 18th century, Rocky Woods was common land the Town of Medfield later divided into woodlots
Medfield, MA

Event Assistant Crew - Weir River Farm
Opportunity Overview Do you love the outdoors and meeting new folks while sharing your knowledge of the area? Are
Hingham, MA

Friday Farm Dinners & Other Events - Powisset Farm
Opportunity Overview: Do you enjoy interacting with the public, making them feel welcome and comfortable? Do you
Dover, MA

Volunteer Opportunities targeted to Corporate, Community and Internships have their own pages.

trustees t

VOLUNTEERS ▼ CORPORATE VOLUNTEERING ▼ COMMUNITY VOLUNTEERING ▼ INTERNSHIPS ▼

To find opportunities on the **VOLUNTEER OPPORTUNITIES CALENDAR** or under a variety of categories such as Agricultural, Cultural, Curatorial and more, hover over **VOLUNTEERS** in the menu at the top, and then hover over **FIND OPPORTUNITIES**. Or try searching for an opportunity by clicking on **SEARCH OPPORTUNITIES**.

VOLUNTEERS ▼ CORPORATE VOLUNTEERING ▼

OUR MISSION

MY ACCOUNT ▶

FIND OPPORTUNITIES ▶

FAQS

RESOURCES

Account Overview Page

VOLUNTEER OPPORTUNITIES CALENDAR

SEARCH OPPORTUNITIES

AGRICULTURAL

COASTAL

CURATORIAL

ECOLOGY

EVENTS & PROGRAMS

HORTICULTURE

SKILLED TRADES

STEWARDSHIP

TRAILS

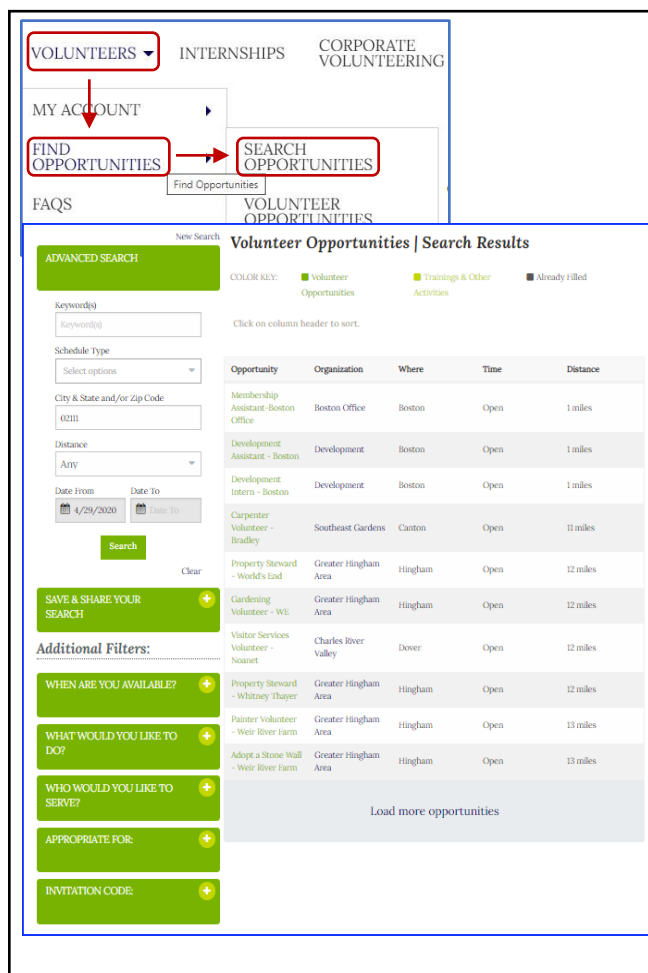
VIRTUAL

To begin a new search, hover over **VOLUNTEERS** in the menu at the top, hover over **FIND OPPORTUNITIES** then click on **SEARCH OPPORTUNITIES**. This page offers advanced searching based on several filters.

PLEASE NOTE: the default search is by shortest distance to your starting location. Opportunities may appear on additional pages so please keep clicking through.

Search Results Grid: Shows all the opportunities meeting the specifications of the search filters. Search results may be sorted by clicking on the header of any column.

- **Keyword Search** is an 'or' search. If you put in two words, it will look for opportunities that can contain one word or the other. Keyword Search looks for matches in the following fields:
 - Opportunity Name
 - Opportunity Description
 - Primary or Secondary Impact Area
 - Managing Organization and Organization Served
 - Skill Categories (optional)
- **Schedule Type**
 - Date and Time Specific
 - Individually Scheduled
- **Location Type**
 - All
 - Address
 - Virtual
- **City and State and/or Zip Code**
- **Distance**
- **Date From** **Date To**



New Search: Cancels all previously selected filters,

allowing you to define a new search. If you do not click on New Search before starting a second search, you'll be carrying over the filters you previously selected unless you open all filter boxes and individually clear each filter.

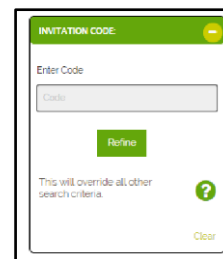
Save & Share Your Search: Use as a navigation item or save as part of your account record so you can easily recall searches. This is especially handy for invitation only and shift related opportunities.

Additional Filters: These expand and offer more filtering options. (See below for information on **Invitation Codes**.)

Clicking on an **Opportunity Name** will take you to the opportunity detail page of the NEXT upcoming occurrence (which is indicated in the "Time" column.)

If there is more than one future occurrence of any date and time specific opportunity, the time column will indicate "+More" -- clicking on that link will take you to a search results page where you'll see all upcoming dates and times for that opportunity. If the time column indicates "Open" it is an "Individually Scheduled" opportunity with no specific date and time indicated. Volunteers can express interest and arrange a date and time to volunteer with the managing organization of that opportunity.

Invitation Codes: Some opportunities are "hidden" allowing only individuals with a code to access them. An example would be opportunities requiring training prior to signing up for a shift. The filter is in the left column, towards the bottom of the screen. Enter the code staff has provided and click **Refine**.



TYPES OF OPPORTUNITIES

There are two different types of opportunities --date and time specific OR open dates and times.

OPEN DATES

These volunteer opportunities have no specific time or date, offering the volunteer the most scheduling flexibility. Volunteers work closely with staff to determine a mutually convenient schedule when the volunteer will assist or perform a specific task. These opportunities require the volunteer to **RECORD MY VOLUNTEER HOURS**. See Page 12 for more information.

DATE AND TIME SPECIFIC

If a date and time are indicated, these opportunities occur at a specific time and date. Staff will Record and Verify your Hours for the opportunities after the date of service.

Opportunity ▲	Organization	Where	Time	Distance
Appleton Farms Learning Garden Volunteer	Appleton Farms	Ipswich	Open	38 miles
Carriage Barn Volunteer - Appleton Farms	Appleton Farms	Ipswich	Open	38 miles
Curatorial Assistant - Appleton Farms	Appleton Farms	Ipswich	Open	38 miles
Events & Marketing Intern - Appleton Farms	Appleton Farms	Ipswich	Open	38 miles
Friday Farm Dinners & Other Events - Powisset Farm	Charles River Valley	Dover	7/10/20 + more 5:00 PM 4 hours	18 miles
Rabbit Volunteers - Appleton Farms	Appleton Farms	Ipswich	Open	38 miles

OPPORTUNITY DETAIL PAGE

Clicking on an opportunity link from the Search page will bring you directly to the **Opportunity Details** page.

Every opportunity has an Opportunity Overview, Responsibilities, Qualifications, Time Commitment and Age Restrictions, if applicable.

The screenshot shows the 'Opportunity Details' page for 'Program Assistant - Rocky Woods'. It includes social media icons for Facebook and Twitter, an 'ISSUE AREA(S)' section for 'Engagement, Civic & Community', and 'REQUIREMENTS' for 'Age Minimum (with Adult): 18+, Minimum Age: 18+'. The 'Overview Overview' section describes the role in the 18th century. The 'Responsibilities' section lists tasks like signing up, providing an excellent experience, and educating visitors. The 'Qualifications' section lists requirements like interest in public work and flexibility. The 'Time Commitment' section states it varies by event.

The bottom of the page will provide a way to **Express Interest** or **Sign Up**.

If your opportunity has an **Express Interest** section, it requires confirmation from the coordinator before you may attend the opportunity.

The screenshot shows the 'Express Interest' section. It features a green bar with 'VOLUNTEERS NEEDED THROUGH 12/31/2020' and a minus sign. Below, it lists the location as 'Canton, MA 02021' and the opportunity leader as 'Eileen Small-Gardens' with a link to email her. A note states that the coordinator will contact the user after expressing interest. At the bottom, there is a green 'EXPRESS INTEREST' button and a link to 'Express interest with a team' with a question mark icon.

If your opportunity has a **Sign-Up** section, you can view the Spots Remaining and click on the Sign-Up button for the date/time you would like to volunteer.

The screenshot shows the 'Sign Up' section. It features a green bar with 'SATURDAY, JUNE 13, 2020 FROM 4:15 PM - 7:45 PM' and a minus sign. Below, it lists the location as 'Medfield, MA 02052', the volunteer limit as '1', and the spots remaining as '1'. The opportunity leader is 'Eileen Small-CRV' with a link to email her. A note states that the full opportunity address and directions will be sent by e-mail after signing up. At the bottom, there is a green 'SIGN UP' button and a link to 'Sign up with a team' with a question mark icon. Below this, there are three more green bars with dates and times: 'FRIDAY, JUNE 26, 2020 FROM 8:40 AM - 12:15 PM', 'SATURDAY, JUNE 27, 2020 FROM 5:00 PM - 7:30 PM', and 'SATURDAY, JULY 25, 2020 FROM 8:40 AM - 12:15 PM', each with a plus sign.

RECORD MY VOLUNTEER HOURS

Report your volunteer hours once you have completed an instance of an “ongoing” opportunity. This enables you to record and report your complete volunteer history on the site.

NOTE: Please contact your volunteer coordinator if you have any questions on the correct Opportunity Name or on whether you should “Self-Report” hours for a specific opportunity.

To record your hours: hover over **VOLUNTEERS** >> hover over **MY ACCOUNT** >> click **RECORD MY VOLUNTEER HOURS**

NOTE: You can only report on dates today or in the past.



Select from the picklist the correct Organization

What do you want to report?

If you volunteered for a specific date and time in the past, select the first radio button. If you have multiple dates on a regular schedule, select the second radio button.

Fill out the next section with the **EXACT** Opportunity Name you found from your Volunteer History. Clicking on the Opportunity Name from your Volunteer History and opening it in a new tab will allow you to “select all” and “copy” the title, then paste it into the Self-Reported Hours tab.

Include the date you volunteered, the Start Time and the End Time. Times should be entered including the AM/PM, leaving a space between the time and the AM/PM

Click **SUBMIT**. You are done, thank you!

Clicking **SUBMIT** creates an opportunity and adds it to the **Self-Reported Hours** part of the My Volunteer History overview, in status “Awaiting Verification”. An email is sent to the organization asking staff to verify the hours.

The Self-Reported Opportunity shows up in the Self-Reported Hours section of the My Volunteer History page. It remains there while awaiting verification, and when it gets verified it will be moved into the regular “Volunteer History with The Trustees of Reservations” grid.