VolunteerManagement.net	Volunteer Coordinator Process Overview

This document describes the basic steps you'll follow using VolunteerManagement.net to define and manage your volunteer organization, from receiving your website address to collecting data after the event has ended. Every event is unique and you may choose to do some things differently, but this procedure will help you understand how your volunteer website works, especially certain important dependencies between required actions and data.

Each step describes your website's operations at a high level. For details on how the specific screens work and all of the functionality available, refer to the ***Volunteer Coordinator User Manual.***

Step 1

Receive the link to your event's VolunteerManagement.net website. Register yourself as the first volunteer in the system. You are automatically assigned as a Volunteer Coordinator.

Click on the provided link to reach your event's volunteer log-in page. Perform the same registration process that your volunteers will by clicking the Sign Up link and completing the registration form.

As the first volunteer in the system, you are automatically assigned Volunteer Coordinator status. You may assign additional Coordinators later if you choose.

Step 2

Click EVENT ADMIN and enter general information about your event such as the date volunteers can access the system and the volunteer waiver.

Now that you're a registered Volunteer Coordinator, you need to specify your event's details. Since they include important information like the volunteer waiver and which fields should be visible during registration, it's important that you complete this form before your first volunteer signs up.

Step 3

Click NEWS ADMIN and enter an initial "Welcome" news item that will be displayed to all new volunteers.

In addition to communicating with your volunteers by email, you can post important information that will appear to every volunteer each time they log in. Posting news make it available to volunteers who don't have or rarely check email. Since all newly registered volunteers will see this news screen, you should create a welcome or general information news item to display.

Step 4

Click **GROUP ADMIN** and create each of the groups your volunteers will be organized into. Volunteers will choose from these groups when they specify their work preferences during registration.

Begin to define your volunteer organization by defining the groups your volunteers and jobs will be organized into. Your volunteers will then be able to select their preferences from among these groups when they register. You can hide certain groups that have special qualifications or are to be filled from a special pool.

If your familiar with Excel, a convenient option is to build your groups, jobs and shifts in a spreadsheet and let the system read it. You can start by just specifying the groups, reading them in, and continuing to build the spreadsheet with jobs and shifts as they are defined..

Step 5

Publicize the website to your volunteers! Check in periodically using **VOLUNTEER ADMIN** to measure progress as your volunteers register themselves in the system.

Once the initial setup work is complete, you're ready to add volunteers. Add a link to the volunteer log-in page on your event's website and include it in emails or print ads. As your volunteers begin registering, you can check your volunteer counts, quickly see new volunteers or review any volunteer's profile.

Step 6

As your captains register themselves, assign them as a captain of their group via **GROUP ADMIN**.

Your Captains will register just like every other volunteer. Once they're in the system and their group has been created, you can assign them to be a Captain. Captains can access profile information for all volunteers in their group and can see how their shifts are filling. However, the ability to enter job and shift information and assign jobs to volunteers is limited to the Coordinators. A group can have more than one Captain.

Step 7

Collect the jobs and shifts for each group in an Excel spreadsheet. As shifts are finalized, use **GROUP ADMIN** to load them from the spreadsheet onto the website. Alternatively, use controls under **GROUP ADMIN** to define jobs and shifts individually.

As mentioned in Step 4, defining your groups, jobs and shifts in an Excel spreadsheet is a good way to keep this information organized and in one place as it's being designed. It also provides a way for your Captains to provide shift information to you that you can load directly into the system. There's no need to keep several spreadsheets or try to remember which shifts have already been loaded. Shifts that are already in the system will be ignored the next time the spreadsheet is read.

Step 8

Once jobs have been added to the system, assign volunteers to them from either VOLUNTEER ADMIN or GROUP ADMIN. You will control which volunteers can sign up for which jobs. You can also make certain jobs automatically available to everyone, if desired.

To make sure every group has adequate coverage and each volunteer has the necessary skills and qualifications, you will assign each volunteer to the job(s) they are allowed to sign up for. You can assign jobs to a volunteer from within their profile or you can assign multiple volunteers to a job from within the job's definition screen. When necessary, you can mark a job as available to all, which means everyone can sign up for shifts without the need for you to explicitly assign the job to each new volunteer.

Step 9

Once assigned to jobs, volunteers sign themselves up for the shifts they'd like to work.

Once assigned, your volunteers can sign up for the shifts that fit their schedule and make changes, if necessary. This lets you focus on all of the other things that needs to get done before the event. To avoid surprises, volunteers are not allowed to remove themselves from shifts at the last minute and are instead instructed to contact their Captain.

Step 10

You and your Captains use GROUP ADMIN to track shifts and identify and resolve issues.

Your Captains can see how their shifts are filling and anticipate problems. They can easily send an email to every volunteer in their group or only those in a specific job or even a single shift. For efficiency, Captains also have the ability to add volunteers to a shift or remove them when necessary.

Step 11

Once the event is underway, you and your Captains can generate daily reports, including shift lists with volunteer names and phone numbers from REPORTS. Use the Check-In screen under REPORTS to allow volunteers to quickly check in using barcode scanning or by keying in their volunteer ID.

During the event, the system can provide a list of that day's shifts and volunteers for each Captain (with phone numbers) and even tell you which volunteers are working right this minute. To make tracking volunteer attendance fast and easy, you can provide a public terminal where your volunteers can check in by scanning a provided bar code or keying in a volunteer ID that you give to them.

Step 12

After the event concludes, use REPORTS to generate summary reports and archive volunteer information for next year.

Once the last shift has been completed, you can save your list of volunteers for emailing next year. You can also run various reports to capture important data, such as total hours worked..

.