The online volunteer center serves as an online platform that helps connect community members with local events and volunteer opportunities. The online center allows local agencies to post information about their organization, contact info, and volunteer opportunities. The site serves as a bridge to build upon our community and local agencies and help both parties build a connection.

The first thing you'll see through this aspect of the site is the homepage which introduces the viewer to recent needs, images of community events, and an interactive option that allows them to search for volunteer opportunities in the area.

Notice the highlighted section on the top right of the screen, here agencies and volunteers are able to log in to their accounts.
Volunteers and agencies upon logging in are both directed to their dashboard where they are greeted by the center. There are two sides to the site, the agency and volunteer side. Everything from the volunteer side is created by agencies on their side. As agency managers of the site it's important you understand how the content you create and upload presents itself on the volunteer side. This is the volunteer side of the site which we will walk through first.

The dashboard from the volunteer aspect of the site gives an overview hours completed, their fiscal impact value of service, keep track of responses to listings, and agencies they have fanned.

The option to keep track of fanned agencies allows volunteers to stay well-informed on posts and receive updates on agencies they admire. As a volunteer and agency manager, you can use the side toolbar to move through the site to view listings.

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The next section in the toolbar is “Needs”, this opens a page of all listing classified as a need. An agency need is an opportunity for community members to attend and volunteer. A need serves as a recruitment listing for an agency to attract volunteers. This can easily be confused by agencies with event postings.

Beneath “Needs” is “Events”, ‘Events” opens a list of upcoming listings in which you can attend. An event listed under an agency is an invitation to attend and become well-informed through functions hosted by local agencies. Do not confuse this with an event that requires volunteers, this would fit under the need listing of an agency.

Volunteers can click on each listing to view more information and details.
Volunteers have a few different ways of searching for agencies and finding their specific listings.

The most convenient way to search is through the toolbar. Clicking on the "Agencies" icon in the toolbar redirects to a directory of all agencies with an account on the Online Volunteer Center. You can find the option to search for agencies and filter searches to find by categories such as causes or distance.

The first tab in the toolbar, "Dashboard", brings you back to your snapshot. Further down on the dashboard, volunteers will see suggested needs based on their interests. The dashboard also gives an opportunity to search locally for listings.

The bottom right-hand image is the introductory homepage of the volunteer center. Volunteers do not have to sign-in to search for local events and needs. They can simply click on the volunteer now icon to search for local listings.
You can search for your agency in the agency directory located under the "Agencies" section of the Toolbar.

Volunteers can go directly to agency pages to view more information about the agency and their needs.

Click on "Fan" if you are not already a fan to get this agency in your suggested needs.

An agency homepage also lists all the causes an agency is listed under. United Way of Will County has one cause listed which is community, this reflects our work with the community in all its aspects.

So, how do you manage your agency page and enter this information as an agency?
Agency Manager View: Toolbox

To access your agency's agency manager view you will have to head to the top right of your screen. You will see the “My Agency” icon, clicking on it redirects you to the agency manager view. Agency manager view is your agency's control operations, allowing authorized users to manage their agency accounts. Agency managers are given a toolbox with the options to manage their agency's page, add/delete/edit events and needs, stats on agency page interactions, a schedule showing upcoming needs and user sign-ups, and time tracking of volunteer hours. These options allow managers to keep track of volunteers and their commitments to agencies.

When you first login, the toolbox automatically directs you to the “Edit” section of the toolbar which allows you to enter and control the aspects you want volunteers to see about your agency. You will also see listed those who have access to your agency's page listed under agency managers.

Speaker Notes:
You can enter and update contact information, basic information, and location for your profile on the Online Volunteer Center.

Place volunteer coordinator or best person for volunteers to contact under “contact information”.

This space not for posting or editing volunteer opportunities.

“Customize Link” allows you to create your own link to use to send your volunteers to your agency’s page. However, this is a long link and it is not easy to say. **Protip:** Set up “jump link” on your website to easily share your agency’s online volunteer center page. Example: [www.yourwebsite.com/volunteer](http://www.yourwebsite.com/volunteer)
When creating your agency account one of the steps is to select “Causes” that are relative to your agency. This allows for volunteers to match their searches to agencies. Selecting the proper causes will allow volunteers to make the right choice in finding an agency with causes they are passionate about.

In your agency managers toolbox, the “Guides” section has the information in the right image; this section also gives various guides on how to utilize the center. It gives a guide on the different causes and examples of the type of agencies associated with causes. It is important to associate the correct causes with your agency to avoid any confusion on what your agency does.

You can select more than one cause or edit the causes you have already on this page.
The “Edit” section allows for you to add your agency’s address. Make sure this address reflects YOUR agency’s location and not United Way of Will County’s address or any other off-site address.

This section also allows for the option to link external websites to your agency page. You can also add links to your agency’s Facebook and Twitter accounts. In order to do is, copy and paste the URL from you agency’s social media accounts and place them here. The volunteer center will then let you upload those links to your agency’s homepage where volunteers and visitors will be able to follow the link to your accounts.
Your profile is only as good as you make it. It is vital in this section of the site that you enter as much quality information about your agency as you can, usually agencies put their boilerplate in this space. Volunteers may be interacting with your agency for the first time through the volunteer center. They should leave understanding your organization. Strive to incorporate your mission and values into your description, creating a personality and a sense of who your agency is. This helps your agency by bringing visibility into what you do and who you serve.

It is also beneficial to incorporate images from your agency and activities into your agency’s homepage; giving a glance into the people and activities surrounding your agency. The option to upload images is beneath the description boxes further down the screen.
Speaker Notes:

Return to your agency and head to the section on the toolbox listed as, “Needs’. It is under this header that you are can input and manage your needs/volunteer opportunities.

Click on the “Add New Need/Event” and you will be redirected to the template to create and upload a new listing.
Speaker Notes:

Fill out some of the basic information such as a title for the opportunity. Titles should not include your agency's name as it will already be listed under the opportunity. The title should be about what the position does. Do not title it "Volunteer opportunity."

Bring your attention to the "Duration" field in the creating a need section. This option opens a drop-box that lets you set the time of the opportunity; the options to choose from are: an ongoing opportunity, custom or recurring shifts, runs until a certain date, or is a one day opportunity.

- Ongoing - For needs that do not have an expiration date, do not have pre-scheduled date, and do not occur in shifts.
- Runs Until - For needs that are ongoing for a limited time and have a definite "end date."
- Happens On - For volunteer opportunities that occur on a particular date.
- Recurring Shifts - For needs that occur in shifts and occur at the same time daily, weekly, or monthly
- Custom Shifts - For needs that occur in shifts that occur at different times within the same day, or at different times on different days.

You have the option to clone needs in order to be able to list different shifts and days, we will talk about this further into the presentation.
Agency Manager: Adding a Need

Speaker Notes:
Template includes question mark icons with further assistance and examples on what to input in to sections.
Add specifications or details on the opportunity that are helpful for volunteers and will provide information on the opportunity you are creating.

The “Attributes” section is one section that is explained as an additional section to add details on the opportunity such as, “Snacks will be provided” or “wear closed-toe shoes”.

The “Address” section is for your agency to list the address of where the need/volunteer opportunity will take place. This can be your agency location, but should not be listed as your agency’s location if the need is off-site. This is where you want volunteers to report to on the day of the opportunity.
Further down the screen you will see additional fields to fill out such as “Interests & Abilities”. More information on these are on the next slide.
You need to associate your need with one or more "Interest". Interests are used to match opportunities with what appeals to each volunteer.

If a volunteer has certain skills or wishes to work within a certain area, matching the correct interests will result in better compatibility.

For example, a volunteer skilled in “Finance” and looking to volunteer in Finance would not be found under “Physical labor.” If you need boxes moved inside an office, this would be under “Physical labor” not “Clerical work”.

Speaker Notes:
Creating a need includes for uploading “Waivers”, do this ahead of time to insure that volunteers receive and complete them before their scheduled shift.

After filling out the need information click on “Create Need” to post.

The steps we used for creating and posting a Need are the same as when creating an Event.
You have the option to edit an opportunity once you have posted it.

In the “Agency Manager Toolbox“, based on the opportunity click to either “Need“ or “Event“. Scroll down to the listing and click “Edit” under that listing and you will be redirected.
Agency Manager: Editing a Need

You can edit a need here on this page. The “Update Need” template follows that of the “Create Need“.

If you wish to deactivate your need, then you can click on the red “Deactivate” icon here. This allows it to be removed from volunteers view, but you can still access the listing and reactivate through the agency manager side.

Clicking on the “Clone” icon, it will copy and recreate the need/event. It will appear as it does on the update need page with “(copy)” in the title section, you can modify it to fit new times or locations. In the new listing, the “Update Need” icon will change to “Create need” to post the newly cloned need/event.

Once you have modified the new need, click “Update Need” to post newly modified need.
The Online Volunteer Center aids in promoting your needs by allowing you to share them across multiple platforms.

To get to the need you wish to share, go to the “Need” section of the toolbox and click on “View” under the need you wish to share.

The listing for the need will appear in volunteer view with all the information you created.

On the right hand side, the option to “Share” will create a drop box with various platforms you can select.
Returning to agency manager view and the "Need" section of the tool box, you are able to view volunteer sign-ups.

Scroll down the list of Events/Needs to select the listing you wish to view and click "Responses".
Speaker Notes:

Lists of volunteers who have enrolled will appear. Scroll further down and you may see a "Waitlist" of volunteers interested in attending if all spots are full.

You can "Message Responders" here by heading to the top of the page. This a great tool that helps you keep in contact and reach out to volunteers.

The "Stopwatch Icon" next to each response allows you input hours for volunteers even after the opportunity has passed.
On the same page, volunteer “Responses,” you can export the list of responses to your computer. Click on “Export Responses.” You can then utilize the list for further documentation or record keeping.

The export of responses will download as an Excel document on the device you are using, the download will appear on the bottom of your screen.
The “Time Tracking” section under the “Agency Manager Toolbox” allows agencies and volunteers to manage volunteer hours. Go here to view and to manage volunteer hours.

Volunteer hours must be approved by an agency manager for the volunteer to receive credit for their work in responding to a need. You will have to select the volunteer hours as they appear, the site allows you to approve multiple request at a time.

Agency managers can also manually input hours for volunteers who responded to a need. The Need section on this pages opens a drop box with recent needs from all over the community. The “Need Dropbox“ opens a list of all needs posted, future and past.

After selecting the need, a list of volunteers who signed up will appear. Select the volunteer you are inputting hours for.

You must then enter the volunteer information such as hours worked, date, and can add a description of their work.
Speaker Notes:

The Online Volunteer Center helps check-in volunteers when a need occurs. This allows for agency managers or volunteer coordinators to immediately check in volunteers to easily manager their hours.

You will have to be under the “Check-In” section of the toolbox, where a list of upcoming or ongoing needs will appear.

You have the option to enter volunteers “individually” or in a bulk “list”. The list option shows you a list of volunteers who responded to the need and allows you to select which to check-in.
Speaker Notes:

This is the list of volunteers who responded to your need. You can check these in by clicking next to the name of the individual.

You will click on the icon, “Check in Users” to clock in volunteers and log in their check in time.
**Speaker Notes:**

If you chose to enter volunteers individually you will be prompted to enter the email for that volunteer’s online volunteer center account. Click “Find My Account.”

Once the site identifies the email address with the account of the volunteer, click the “Found You! Click to Check in Now” icon to submit the volunteers check in request. You will receive a confirmation that the volunteer was checked in.

**Protip:** Set up a computer and have volunteers check themselves in on this screen.
The "Checked-in Now" tab under the agency managers toolbox allows you to enter a check out time for volunteers. This allows you to enter the check out time for volunteers at the end of the day or shift for a current need. Go down to the list of checked in volunteers and you will see a "Check-out Dropbox" that allows you to input an out time for that volunteer. This will complete and log their volunteer service hours for that need.
Speaker Notes:

If you need more information, use the guides located here.
Agency Manager: View:

Speaker Notes:

You can view your modified page with your new need posted back on your agency page.

In the toolbox and click “View” to be redirected to your agency page.
Speaker Notes:

Your agency page is what volunteers view about your agency. Any modifications or new listings should be reflected here.

You can utilize this to view modifications from the volunteer viewpoint, analyzing your page from the volunteers point of view.
Best Practices:

- Post opportunities as soon as needs and events are planned. This will give time for volunteers to find the opportunity.
- Use the community calendar of events to see when others are having events.
- Don’t wait to use notes from this training - you will forget!
- Capitalize on the “clone” tool.
- Use the “Court Mandated” option under interests.
- Have more than one person authorized to manage your page as this will help if someone is out of the office.
Thank You

Contact Sarah Oprzedek for further questions.
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