



**United Way
Centraide**
Windsor-Essex County



WE Volunteer

Administrator Guide

October 2018

Give. Volunteer. Act.

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Organization Profile

About this Page

All information entered into the Organization Profile is the agency's information that will be viewed by potential volunteers.

Keep in Mind

Legal Name: is the Organizations Legal Name as per Canada Revenue.

- Name Continued is due to their being a character limit; it is a continuation of the legal name.

Physical Address: location of the agency.

Mailing Address (If Different): Sometimes the mailing address differs from the physical location of the agency.

Business e-Mail (Org): the general agency email for any inquiries.

(e.g.- united@weareunited.com)

Website: URL for the agency website.

(e.g.- <https://www.weareunited.com>)

Organization Main Phone: Should be the front desk/ reception phone number in case of any general inquiries.

Organization Description

About this Page


The Organization Description is information about the agency and is what potential volunteers will see when searching for opportunities.


How to Create a Description

- Click the Add button – You will be redirected to the “Add Description for Volunteers” page.

Add Description for Volunteers

- **Description Type:** Volunteer

- **Effective:** Click the  icon and set the date you would like this description to become public.

- **Expiry:** Click the  icon and set the date you would no longer like this information to be published on the website.

- **Description:** Enter in a 1-2 sentence description of the agency, programs provided by the agency and any information you would want readily available for volunteers to see.



Please note that HTML is not allowed.

- Click the Add button at the bottom of the page to save the description.

**** The reason agencies are able to set Effective and Expiration Dates is so that you can preemptively have other Descriptions available in case of changes in the program or if the agency decides to rebrand.**

Maintenance

When on the Organization Description Summary page, you can make modifications to the descriptions.


- To edit the description, select the  icon.
- You can set an expiry date at any time by clicking the  icon.

My Profile

About this Page

The My Profile page is a mixture of the administrator's personal and professional information and some information will automatically populate, as the information is pulled from our systems.

Things you can Change

- Gender
- Individual Work e-Mail
- Cell Phone
- Individual Work Phone
 - * **A preferred contact number can be selected from the options listed.**
- User ID
- Password
 - * **The admin is able to update their User ID and Password by selecting the  icon.**

Things you cannot Change

- Name
- Employer
- Employee ID


***If these details have changed, or another admin needs to be created. Please contact us at wevolunteer@weareunited.com or give us a call at 519-258-0000 x1125.**

Opportunity List

About this Page

The Opportunity List is where all of the volunteer opportunities are listed, active or expired.

How to Create an Opportunity

- Click the Add button at the bottom of the page – You will be redirected to the Opportunity Maintenance page.
- Enter in the Opportunity Title (e.g. Garden Clean Up)
- Provide a description of the opportunity (e.g. Volunteers needed to tidy up our garden - pulling weeds, turning over soil, etc.)
- Click  to add a contact to the opportunity – This contact will receive email updates for the opportunity.

Opportunity Maintenance

General Information:

Class: Will always be **General**.

Volunteer Role: Select the closest description for what the volunteer will be doing (e.g. General Labourer/ Maintenance Person)

Status: Only **Publish** opportunities will appear online for volunteers to view and show interest. **Cancelled**, **Closed**, and **Expired** opportunities will be removed from the view of searches

Type: Opportunities can be listed as Group or Individual; which means volunteers can sign up as individuals or teams can be created and can apply for the volunteer opportunity together. **Please select all “Types” you would like to be able to apply.**

From Date: Click the  icon and select the day the opportunity takes place

To Date: Click the  icon and select the day the opportunity wraps up.

Minimum Number of Volunteers: Please put the absolute minimum amount of volunteers needed to complete the opportunity before cancelling the opportunity.

Maximum Number of Volunteers: The max amount of volunteers needed to complete the opportunity.

Length of Opportunity (Days): How many days does the opportunity run for.

Minimum Age: What is the youngest age the volunteers can be?

Minimum Age (with Accompanying Adult): What is the youngest age the volunteers can be if they have supervision?

Maximum Age: How old is the limit in which the volunteer can be?

Receive e-Mail Schedule: – We recommend this setting be set to As Occurred or Daily so that our system sends out notifications as they occur or on a daily basis but if the

event coordinator is only available say Tuesdays, you can set it to Every Tuesday and our system will only send emails that day.

Volunteer should provide: List anything that is required but not provided by the organization for the Opportunity. Such as, closed toed shoes and recommended attire.

Organization will provide: List anything that will be provided by the organization to assist the volunteer in completing the Opportunity, like gardening tools and gloves.

Opportunity Location: List the physical location the Opportunity is located, as sometimes it is a different location than the organization.

***Events are unable to be modified, as it is updated automatically through our systems if the Volunteer Opportunity is linked with a United Way Event.**

We ask that you select all applicable requirements for the following sections:

- **Qualifications Required**
- **Select the Time(s) and Day(s) when the Opportunity occurs**
e.g. If the event is held Sunday from 9am to 3pm on a Sunday, select Sunday Mornings Sunday Afternoons
- **Select the Municipality where the Opportunity occurs**
- **Special Needs of Volunteers that can be accommodated**
- **Language Required**
- English is not an option as it is selected by default.
- **Client Population(s) Served by Opportunity**
- **Organization is able to Report Volunteer Hours**
- This lets Volunteers know that the Organization is able to sign off on Court Ordered Community Service and/or the mandatory volunteer hours High School students are required to complete so they can obtain their diploma.
- **Skills Required**
- **For Minor Sport Coach/Official ONLY please select the Sport Required**

****It is important that these sections include all requirements, as our system filters through volunteer profiles and matches them accordingly to the information provided.**

***A volunteer matched, has to meet all requirements provided by the Organization.**

- Select Add to create the Opportunity.


How to Update an Opportunity

- From the Opportunity List, click on the Opportunity Title.
- You will be redirected to the Opportunity Maintenance page.
- Make changes to the details.
- Click on Update at the bottom of the page.

***Updating an Opportunity places it in a default status Open. To change the status to Publish and make the opportunity available online relick the Opportunity Title, change the status of the opportunity and click update at the bottom of the page.**




How to Copy an Opportunity

Organizations can have multiple Opportunities with the same or similar requirements. Rather than creating an entirely new Opportunity, the option of copying a previous Opportunity and making minor changes to the requirements (e.g. From and To Dates) is available.



- Find the Opportunity that you would like to copy from your Opportunity List
- Select the copy icon  and you will be redirected to the Opportunity Maintenance page
- Make any changes to the Opportunity Requirements
e.g. From Date, To Date, Length of Opportunity (Days) and Select the Time(s) and Day(s) when the Opportunity occurs, etc.)
- Click the Add button to create the Opportunity.

How to Create Volunteer Shifts



When creating an Opportunity instead of having one window of time, you’re able to break it up into shifts.

- From the Opportunity List, go to the Opportunity
- Select the Dates/Times  icon
- You will be redirected to the Update Volunteer Shifts for this Opportunity page
- Select Add
- Fill in the shift details:
 - Start Date/ Time (Click the  icon.)
 - End Date/ Time (Click the  icon.)
 - Minimum # of Volunteers
 - Maximum # of Volunteers
 - Status – **Publish** (Publish allows the shift to be viewed by the public.)
 - Check off **Hold** to stop volunteers from being able to apply for that time slot.
 - Click Add to save the changes.

Please add the date and time of the Volunteer Shift you are creating

Opportunity	Garden Clean Up		
Description	Morning Session		
Start	07/19/2018 	9:00	AM ▼
End	07/19/2018 	12:00	PM ▼
Minimum # of Volunteers	1		
Maximum # of Volunteers	10		
Status	Publish ▼		
Hold	<input type="checkbox"/>		
	<input type="button" value="Add"/> <input type="button" value="Cancel"/>		


Maintaining Volunteer Shifts

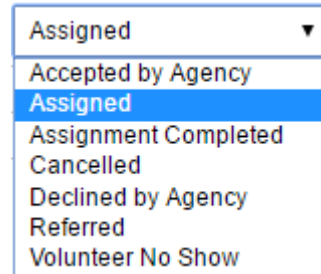
Once you’ve created Volunteer Shifts, you can delete or edit the shift. You can do so by clicking the icons to the left of the Shift you would like to modify (Edit -   Delete).

***If editing, be sure to click Update to save your changes and check the status of the shift to ensure that it is able to be viewed by the public.**

Volunteer List/ Managing Volunteers



After an Opportunity has been created, our systems filter through applicants and match them accordingly by the requirements set by the Organization. Once matches have been generated Organizations can accept, decline and manage the Volunteers via the Volunteer List.

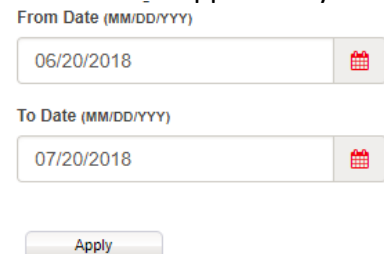
- From the Opportunity List, go to the Opportunity and select the Volunteer List  icon.
- Once redirected to the Volunteers for Opportunity page, you will then be able to change the volunteer's status from the default Referred to Assigned, Declined, Cancelled, etc.
- Once a Volunteer has been changed to Assigned, we recommend sending a confirmation email with finalized details for their records. This can be completed by hitting the send mail button at the base of the volunteer list.
- You can also select the Spreadsheet button, which compiles all of the Volunteer data into an excel file.




View History

After an Opportunity has been made public, the Organization can check the View History to see how many times the Opportunity was viewed on a daily basis by Volunteers. This information can be exported into a spreadsheet and is also searchable by date.

- To review the View History, select the  icon located to the left of the Opportunity
- To search by date, click the according  icon to modify the search parameters and select Apply.
- To export the data to a spreadsheet, select the Button at the bottom of the page

A screenshot of a date selection interface. It has two input fields. The first is labeled 'From Date (MM/DD/YYYY)' and contains the date '06/20/2018'. The second is labeled 'To Date (MM/DD/YYYY)' and contains the date '07/20/2018'. Both fields have a small calendar icon to their right. Below the fields is a button labeled 'Apply'.

Preview

To preview the Opportunity and see it as a Volunteer would, select the Link  icon located to the left of the Opportunity Title on the Opportunity List page.

Search

To search the Opportunities by status, check the status type and click the red arrow icon to search.

Open Publish Closed Expired 