



Volunteer Management tutorial

Introduction

This tutorial assumes that you have already read through the “First Steps” tutorial and that you have CharityMaster open on a computer in front of you while you are going through this tutorial. The instructions in red italics tell you what to do on the computer.

There are two aspects to managing volunteers:

1. Set up a “volunteer profile” for each volunteer. Once all of the profiles have been set up, you can produce lists of volunteers based on what they want to volunteer for, when they are available, what qualifications they have and / or whether you have accepted them as a volunteer. You can also do mail merges and e-mail blasts based on these same criteria.
2. Once the profiles have been set up, you can create “jobs” and assign volunteers to these jobs. A job can be a position in your organization such as “President,” a committee or an event. Once volunteers have been assigned to jobs, you can send mail merges and e-mail blasts to just one committee or just to the volunteers working on a specific event. Volunteers can be assigned to more than one job. Please note that you do not have to assign volunteers to “jobs” to be able to use the functionality described in 1 above.

Volunteer profiles

Go to any name in the database – preferably one that is already a volunteer.

Then either:

- *Click on the **Volunteer** button in the lower right corner of the **Maintain names** screen or*
- *Press Ctrl + O together.*

*The **Volunteer profile** screen will open.*

You won’t be entering anything on this screen yet. Just read about each of the fields and buttons. Later in this tutorial you will set up a profile from scratch.

Volunteer preference flags

These flags allow you to record the types of things that each volunteer is prepared to do.

Preference flags are used to identify those people to contact when a specific task or activity needs to be performed. You can define an unlimited number of volunteer preference flags. Some ideas for volunteer preference flags are:

- Office work
- Driving / delivery
- Telephone solicitation

- Supporting various kinds of events

Note the following:

- Volunteer preference flags are not the same as the “Prospect / communication” flags that are set on the **Maintain names** screen.
- You can maintain your own list of volunteer preference flags. (Go to File → Maintenance → Volunteers → Volunteer preference flags.)

Only 25 flags can be assigned to a single name. You can search through your volunteers or create a report / bulk mailing / e-mail blast using a single flag or any combination of two or three flags.

You *should* input at least one volunteer preference flag for every volunteer.

Acceptance Status

If some or all of your volunteer jobs require some sort of screening (e.g. a police check) or some sort of specific training (e.g. orientation to your organization), then you can indicate the readiness of the volunteer to be given assignments by using the **Acceptance Status** field. There are four possible values:

- Not started
- In process
- Accepted
- Rejected (You may want to keep this person as a volunteer. It may be that they can't be assigned to certain jobs.)

Qualifications

You can indicate important qualifications that a volunteer already has by selecting one or two from the drop down lists. You can add, edit or delete the range of qualifications available on the drop down list by using the **Maintain volunteer qualifications** screen. If it is important that your organization verifies that the person has a particular qualification, then you can record the initials of the person who checked the qualification. Finally, you can specify a date that the qualification (e.g. a drivers licence) will expire. When you specify the date that the qualification will expire, CharityMaster will automatically add a reminder so that you can follow up on this qualification.

Availability

There are two sections that determine availability:

- When people are available. You must indicate that a volunteer is available on at least one day of the week. To indicate that they are available for assignment at any time, select every day of the week.
- When people are NOT available - i.e. they are away on vacation for the period indicated.

When you start CharityMaster, the system will check all volunteers to see if the period when they were not available has passed. It will then uncheck the **Not available during the following period** checkbox.

Let's indicate the Peter Giving is available just during the day on Saturdays. Put a check mark beside Saturday and then select “Morn or aft” from the list of options.

Recorded hours

CharityMaster allows you to record the number of hours contributed by each volunteer and to compute

the value of those hours to your organization. Of course, you do not have to record the hours.

This screen shows all of the hours that have been recorded for this volunteer. You can edit or delete the hours that have already been recorded by double clicking on any row of the table of recorded hours. To add additional hours, click on the 'Enter hours' button.

Notes

Use this field to record information about this volunteer's past performance, their need for transportation, etc.

Assignments

You can see all of the jobs to which this volunteer has been assigned by clicking on the Assignments button. This will bring up the **Job Assignments** screen.

Activity / Position name		Date activity starts	Date activity ends	Assignment Status
Marketing committee	Committee			Proposed

Print Profile

You can print the complete volunteer profile in a form that you can hand to a chair person or coordinator. Click the **Print Profile** button.

*Now close the **Volunteer profile** screen by clicking on the **Cancel** button.*

On the 'Maintain names' screen

Volunteer indicator

Note that, after you have set up a volunteer profile for a person, a check mark will appear beside the **Volunteer** button.

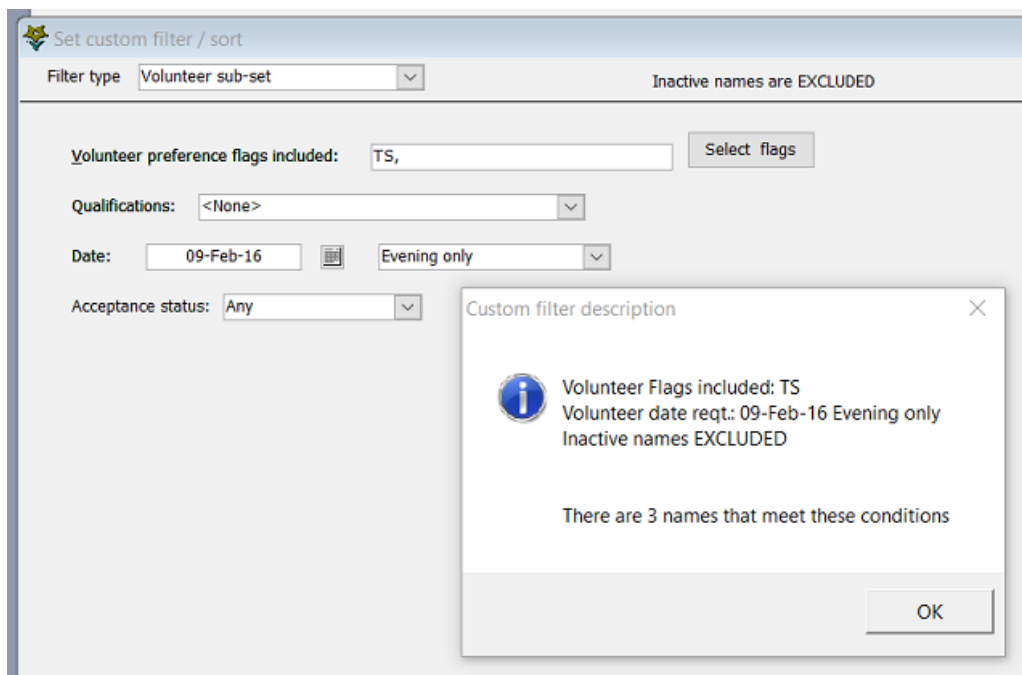
Links

If a volunteer was referred to your organization by another person in your database, you can create a link between the volunteer and the person who referred them.

Custom filter

You can select only those volunteers that meet specific criteria by creating a custom filter. When you create a custom filter, only those names that meet your criteria will appear on the **Maintain names** screen. You can also print a list of the selected volunteers and/or send a mass mailing to them and/or sent an e-mail blast to them.

To set up a custom filter, ensure the **Maintain names** screen is open. Then either click **Custom filter / sort** → **Set custom filter / sort** or press the F4 function key. On the **Set custom filter / sort** screen, select "Volunteer sub-set" from the drop down in the upper left of the screen.



You can then select any combination of the four parameters. Note that you can enter up to three flags in the preference flags field.

Delete volunteer profile

To delete the Volunteer indicator, open the **Volunteer profile** screen and click the **Delete Volunteer Status** button. This will delete the volunteer profile and all of the assignments to jobs for this volunteer. Note that deleting a volunteer profile will NOT delete any recorded hours for that volunteer.

Practice session 1

This practice session requires that you set up a person as a volunteer. If you are using a live database, you can either navigate to a person that is NOT already a volunteer, or set up a new name in the database. Don't worry: we'll remind you to delete the data you input at the end of this tutorial.

Follow each of the instructions below.



Now let's set up someone as a volunteer. Before we start, you must ensure that some volunteer flags have been set up in your system. Click on **File → Maintenance → Volunteers → Volunteer preference flags** to ensure that this is the case.

Now go to one of the names already in the database. Then either:

- Click on the **Volunteer** button in the lower right corner of the **Maintain names** screen or
- Press Ctrl + O together.

The **Volunteer profile** screen will open.

1. **Preference flags.** Let's start by entering *at least two* "preference" flags. (*You must enter at least one volunteer preference flag for each volunteer.*) Double click on the "Volunteer preference flags" field or press the **Select flags** button.

- a. On the **Set volunteer preference flags** screen, select any one of the flags in the left hand column.
 - b. Click on the  button and the flag will move over to the right hand column. (Instead of selecting a flag then clicking the  button, you can simply *double click* on a flag to move it from the left column to the right column.)
 - c. Repeat steps 1a and 1b for any additional flags you want to add. (You can add up to 25 flags for each volunteer.)
 - d. Click on the “Save” button and all of the flags you have moved to the right hand column will appear in the “Volunteer preference flags” field.
2. **Acceptance status.** Change to “Accepted.” Your organization may not need to use this parameter in which case you can leave the status as “Not needed.”
 3. **Qualifications.** If you wish, you can enter a qualification by selecting one from the drop down list. You can add qualifications by going to **File → Maintenance → Volunteers → Qualification list**. If there are no qualifications set up in your system, you don’t have to enter anything.
 4. **Availability.** Place a check mark against Tuesday and then select “Morn or aft” from the drop down list that appears. Place another check mark against Wednesday and select “Evening” from the drop down list.
 5. **Not available.** You can enter something here but it’s not necessary for the purposes of this tutorial.
 6. **Notes.** Enter something if you wish.
 7. Click the **Close** button or press Alt + C. You have created your first profile!
 8. Create a second profile unless there are already some profiles in the database. For the second profile, ensure that Availability is set to Wednesday “Evening.” (Or Wednesday “Any time”, etc.)
 9. Now let’s create a custom filter. Press the **F4** function key. On the **Set custom filter / sort** screen, select “Volunteer sub-set” from the drop down in the upper left of the screen. Click the calendar button to the right of the “Date volunteer required” field. Select a Wednesday date. Then select “Evening only” from the drop down list that appears. Click the **OK** button.
 10. Scroll through the names on the **Maintain names** screen. You will see that, at the least, the person with the new volunteer profile you set up will be included. If you set up a second profile in step 8, that person will also be included.
 11. Now let’s create letters to send to all the volunteers that meet our filter criteria.
 - a. Click on **Bulk Mailing Wizard** on the menu bar at the top of the screen.
 - b. Select “Custom list” from the “Mailing list” drop down field.
 - c. Select a template from the “Template selected” field. (Pick any template – we aren’t going to send the letters.)
 - d. Click the **Create** button. Provided the address fields are complete for each of the volunteers included in your filter, a letter will be created for each one of them.
 - e. Close Word without saving the letters. Do NOT allow CharityMaster to add any communications history for the letters.

You have finished Practice session 1.

If you are practicing with your organization’s ‘live’ data and you don’t want to complete Practice Session 2 below, you should delete the volunteer profile(s) that you set up.

Setting up a job

CharityMaster’s volunteer management functionality revolves around the combination of defined “jobs” and volunteer *profiles*. Remember that a job can be a position in your organization such as “President,” a committee or an event? Once the volunteer profiles have been entered and the jobs have been defined, you can assign volunteers to jobs.

Open the **Manage jobs** screen from the main menu: **File → Volunteer management → Manage jobs**.
This screen lists all of the jobs that have been defined.

You won't be entering anything on this screen yet. Just read about each of the fields and buttons. Later in this tutorial you will set up a job from scratch.

Delete a job

The **Delete** button will delete the job and all of the volunteer assignments connected to it. You cannot delete a job if the job has volunteer hours connected to it. Instead, you can make the job **inactive**.

Inactive jobs

To make a job inactive, simply put a check mark in the "inactive" field beside the job. Inactive jobs are no longer available for assignments.

Default job

You **MUST** designate one job as the default job. The default job is the one that will be displayed when you first open various screens such as the **Volunteer assignments** screen.

Edit a job

When you select a job then click on this button the **Add / edit volunteer jobs** screen will open.

Add a new job

Click on the **Add** button. The **Add /Edit volunteer jobs** screen will open so you can define a new "job."

Add / edit volunteer jobs screen

Job types

CharityMaster allows you to set up three different job types:

- **Positions.** This type allows only one person at a time to be assigned to a position. If you have two people "sharing" the same job, you must set up two different positions.
- **Committees.** This type allows you to assign an unlimited number of volunteers. You can also identify a committee chair.
- **Activities.** This type also allows you to set up an unlimited number of volunteers but it requires you to specify a job start and end date. This is useful when you need to find volunteers who are available on a specific day or a series of dates. You can also identify a person who is the coordinator of the activity.

Job name

The job name may be up to 50 characters and it must be a unique name: i.e. you cannot have two positions called "Treasurer."

Chair or coordinator

You do not have to specify the chair of a committee or the coordinator of an activity.

Hourly rate

If you wish to put a value of each of the volunteer hours contributed, you can enter an amount here. The total value of contributed hours for any date range is shown on the **Volunteer Hours by Position / Activity** report.

Location

Here you can enter the location where volunteers will be asked to perform their jobs. This field is just for your reference. In a future release of CharityMaster, this will be included automatically in a letter or e-mail that you can produce for prospective volunteers.

Number required

For committees and activities you can specify the total number of volunteers required. This information should be very helpful as you are assigning volunteers to jobs and getting confirmation from them that they have accepted the assignment.

“Volunteer profile required” section

In this section, you specify all of the requirements for the job. As you assign people to this “job,” CharityMaster will check the person’s volunteer profile to ensure they meet the requirements for the “job.”

If the job type is an activity, you must specify the start and the end dates of the activity. If the activity spans several dates and requires different numbers of volunteers and / or different skill sets for each date, you should probably set up a different activity for each date.

If necessary, you can specify the qualifications that each volunteer must have. You can add, edit and delete the available qualifications with the **Maintain volunteer qualification list** screen.

If a job requires some sort of screening (e.g. a police check) or some sort of specific training (e.g. orientation to your organization), then you can indicate the requirement for this position by using the **Status** field.

Finally, you can specify the volunteer preference flags that indicate which volunteers would be interested in this job. You cannot enter flags directly into the Volunteer Preference Flags field. To add or delete flags, you must double click on the Flags field or click the **Select Flags** button. When you do either of these actions, the **Set volunteer preference flag** screen will appear. You can add up to three flags.

Outline

Here you can enter a description of the job. In a future release of CharityMaster, this will be included automatically in a letter or e-mail that you can produce for prospective volunteers.

Recording method

Here you can elect whether to record hours a day at a time, a week at a time or a month at a time. If the job is an "Activity", then all hours must recorded day by day. CharityMaster does not require that you record any volunteer hours.

*Click the **Cancel** button to close the **Add / edit volunteer jobs** screen.*

Assign volunteers to a position / committee / activity

*On the **Manage jobs** screen, select an active job from the list. Click on the **Default** checkbox to make this the default job. Now click the **Assign volunteers** button. The **Volunteer assignments** screen will appear and show the particulars for the Default job.*

You can select a different job from the drop down list at the top of the screen to manage the volunteer assignments for a different job.

For each active job, this screen shows the particulars of the job and a listing of all of the volunteers you have assigned to the job. You can assign volunteers to a job before you have received confirmation they are willing and able to do the job. You can keep track of which volunteers have accepted the assignment using the **Assignment Status** of each person.

The assignment status will also help you to ensure that you have thanked each volunteer for their efforts.

Chair / coordinator

If you assigned a chair or coordinator to a position when you set up the committee or activity, that person will also be listed as being assigned to the job on this screen. You can change the chair / coordinator on this screen.

Assign a volunteer to this job

To assign volunteers to this job, you will click on the **Assign new** button. You can only assign one person to a "Position" but you can assign an unlimited number of people to the other types of jobs. CharityMaster prevents you from assigning the same person more than once to a job.

After you select a volunteer, CharityMaster will check to see if the person matches the following criteria:

- For "Activities" it will check to see if the selected volunteer is not available during any part of the duration of the activity.
- It will check whether or not the volunteer has the required qualification(s) and whether those qualifications have expired.
- It will check to see if the volunteer has the required acceptance status.

Once a name has been assigned to a job, you can set the **Assignment Status**. The possible values of this field are:

- **Proposed.** This means that you have asked the volunteer to do the job but you have not yet heard from them whether they have accepted.
- **Accepted.**
- **Completed.** This means that the volunteers work on the job has been completed.
- **Thanked.** This means that you have formally thanked the volunteer for their efforts.

Un-assign a volunteer from this job

Select a name and then click on the **Un-assign selected** button to un-assign the person from the job. Removal of a person from the list on this screen does not affect any recorded volunteer hours.

Recording volunteer hours

You can double click on any name on this list to record the hours contributed by that volunteer.

*Click on the **Maintain jobs** screen.*

Practice session 2

Now we are going to set up a committee and then send an e-mail to each member of the committee.

1. **Set up a 'job.'** Click **File → Volunteer management → Manage jobs**. If you are using the data that shipped with CharityMaster the "Marketing committee" will already be set up. Click the **Edit** button.

If you are using your organization's 'live' data, then click the **Add** button. The **Add / edit volunteer jobs** screen will open.

- a. **Type**. Select "Committee" from the drop down list.
 - b. **Name**. Enter the name of the committee: e.g. "Sky gazing committee."
 - c. **Chair**. Select a name from the drop down list by typing the last name and then selecting one of the names.
 - d. **Hourly rate**. Don't enter anything here unless your organizations needs to compute the value of the hours contributed by your volunteers.
 - e. **Location**. Don't bother entering anything here.
 - f. **Number required**. This is the minimum number of people required to staff the committee properly.
 - g. **Qualifications**. Select a value from the drop down list.
 - h. **Acceptance status**. Leave this set at "Any."
 - i. **Volunteer preference flags**. Enter at least one of the available flags.
 - j. **Outline**. This might be the role or mandate of the committee.
 - k. Click the **Save** button and you will be returned to the **Manage jobs** screen.
2. Now let's assign some volunteers to this committee. With the "Marketing committee" or "Sky gazing committee" selected, click on the **Assign volunteers** button. The **Volunteer assignments** screen will open. (Later, you can get to this screen directly by clicking **File** → **Volunteer management** → **Assign people to jobs**.)
- a. Select the job you want to manage from the drop down list.
 - b. Select the chair by starting to type the last name of the person. You can also scroll down the list of volunteers. Note that only those names for whom a volunteer profile was set up will appear in this list. The chair will appear as one of the members of the committee.
 - c. Now add a new member. Click on the **Assign new** button. In the screen that appears, start by typing the last name of the volunteer. You can also scroll down the list of names. Click on the **Save** button.
 - d. If the person does not meet one of the critical criteria (qualifications and acceptance status) for the committee (e.g. they require a driver's license but they don't have that qualification), you will receive a message asking if you still want to assign this person to the committee. CharityMaster ignores the preference flags when making assignments.
 - e. When a new person has been added to the committee, their "Assignment status" is set to "Proposed." If the newly added member has already agreed to serve on the committee, you can change the "Assignment status" to "Accepted."
3. Ensure that you have at least two members of the committee. Now let's see how you can send an e-mail to all members of the committee.
4. Click on **E-mail Wizard** in the menu bar at the top of the screen.
- a. Select the "Volunteers" group of mailing lists.
 - b. Select "Marketing committee" or "Sky gazing committee" from the list of "Committees / activities."
 - c. The total recipients' field should contain the number of people you have assigned to the committee. If the number is less, then one or more of the members do not have an e-mail address.
 - d. At this point, you would normally click on the **Send blast** button to create and send an e-mail message to each member of the committee.

If you are practicing with your organizations 'live' data, you should now:

- 1. Delete the job you created. This will delete the assignments of volunteers to the committee.*
- 2. Delete the volunteer profile(s) you created.*

WE HOPE YOU ENJOYED DOING THIS TUTORIAL. ALL OF THIS INFORMATION IS ALSO AVAILABLE IN THE CHARITYMASTER HELP SYSTEM. PRESS THE F1 KEY ON ANY SCREEN TO GET THE INFORMATION YOU NEED.