

Using Volunteer Opportunities For Campus Coordinators



### **Training Agenda**

- $\star$  Why Use Opportunities?
- $\bigstar$  Creating Volunteer Opportunities
  - Calendars, Forms, URLs
- ★ Notifying Your Volunteers
- ★ Tracking Opportunities
- ★ Using Opportunities w/ Your Kiosk

### Why Use Opportunities?

- ★ Organize activities at your school
  - Shared Responsibility
- ★ Communicate with school volunteers
- ★ Track who is attending & their hours
- ★ Sign-up through your kiosk
- ★ Recognize & award your volunteers

# **Creating An Opportunity**

★ Settings

- Available ALL, Display Kiosk, #Needed
- $\star$  Basic Details
  - Name, Category, Desc, Location
- ★ Schedule
  - Start/End, Recurrence Pattern & End Date
- ★ Add To EZVolunteer Calendar
- $\star$  Assign Coordinators
- ★ Personalize Thank You & Continue Button



Add Opportunity		
🖉 Available ALL 🗏 Display Kiosk	Volunteers Needed: 999 Matched: 0 Logged: 0	Save Cancel

#### Available ALL - Appears In MyAccount for your Vols

Display Kiosk - Appears On Start Vol Pg

Vols Needed - Limits Max Matched Vols

### **Details**

Name	Туре		School				
Hearing Tests	Clerical/Office	•	Adams Elementary	۲			
Location							
Central Office - 124 Main Street, Ourtown, TX 7778							
Description							
We need five (5) volunteer per shift for one-hour shifts from 9:00 AM 3rd to help sign-in patients and assist audio technicians.	12:00 PM on October						
Volunteers sign-in at front office reception (use your badge and select you sign-in). The clerk will direct you to the nurse's office.	this opportunity when						

#### Name - Appears In MyAccount & email

#### Type - Category For The Vol Activity

#### Location - Specifics, other than your school

Desc - Add'l info about arriving, etc.

# <u>Schedule / Calendar</u>

Schedule       - Set the start/end date and time. If this is a recurring opportunity start/end refe         Start Time:       10/3/2016         Y       10/3/2016         Y       12:00 PM ▼	Schedule       - Set the start/end date and time. If this is a recurring opportunity start/end refer to the first occurrence         Start Time:       9/30/2016       ♥ 6:00 PM         End Time:       9/30/2016       ♥ 9:00 PM         Image: This is a recurring opportunity       ♥ 100 PM						
This is a recurring opportunity	Recurrence Pattern						
Add Opportunity To Calendar Select Event Type 🔻	Daily     Recur every     1     week(s) on:       ● Weekly     Sunday     Monday     Tuesday     Wednesday       Monthly     Thursday     Friday     Saturday       Yearly     Yearly     Saturday     Saturday						
Single Event	Range of recurrence Ind On: 10/28/2016  End After: 1 occurrences						
Recurring Program	<ul> <li>No End Date</li> <li>Add Opportunity To Calendar</li> </ul>						

Start/End - Single Event / Recurring Program

Recurrence Pattern - Daily, Wkly, Monthly, Yrly

**Recurrence Range - End date** 

Add Event To Calendar - Select Your School

### **Coordinators**

Opportunity Coordinators	-(op	tional) an opportunit	ty coordinator a	s the contac	t for this opportunity					
					ASSIGN COORDI	NATOR(S)				
FName	-	LName	-	Email	-	Phone	-	School	-	Notify On Sign-up
Demo		Partner		partner@rel	atrix.com			*Administration Building		
Demo		Support		mfranke@re	latrix.com	720-989-8195		*Administration Building		
Page 1 of 1 (2 items) < [1]	Σ									Page size: 100 🖂

#### Assign - Choose One Or Multiple Registered Vol

#### Notify - Email Notification When Vols Signup

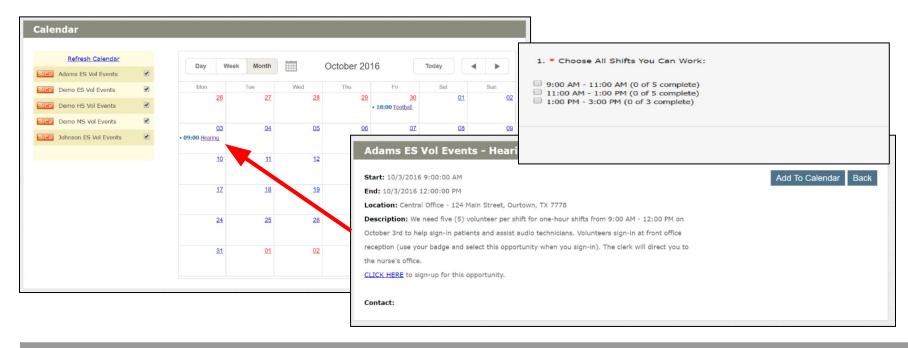
# Thank You / Shift Schedule

	U 📾 🎭	Lucida S • 1	6 • A.• A.•		
Thanks for	signing up	o for this oppo	ortunity!		
Please use the	CONTINUE bu	utton to view and se	elect the shift that	you can	
				Characters: 372/1	

#### Create Custom Thank You Message

Use External URL or Link To Form For Shift SignUp (Displayed after volunteer clicks CONTINUE)

# Calendar Sign-up



### Upcoming Events Display On Website Calendar

Approved Volunteers Sign-up, Choose Shifts & Add To Personal Calendar

# My Account Sign-up

			Opportunity:	Hearing Tests				
			School:	Adams Elementary				
Opportunities			Location:	Adams ES - 124 Main Street, Ourtown, TX 7778				
Please sign-up for an opport	unity from the list h	elow Click on	Coordinator:	Demo Support				
of the opportunity.	unity from the list L	elow. click off	Description: We need five (5) volunteer per shift for one-hour shifts					
				9:00 AM - 12:00 PM on October 3rd to help sign-in patients and assist audio technicians. Volunteers sign-in at front				
Schools on your profile that	may have available	opportunities:		office reception (use your badge and select this opportunity when you sign-in). The clerk will direct you to the nurse's office.				
*Administration Building ,De	mo High ,Adams El	ementary	Starts:	10/3/2016 9:00:00 AM				
			Volunteers Needed:	15				
Name	School	Type	Volunteers Still Needed:	15				
Feetball Concession 1	Dep High		nteers for three shifts in the morning to complete our hearing tests nentary on October 2nd.	Please choose the shift you want to work for the hearing tests opportunity				
Football Concession_1	Denio High	Au		ide Later				
Football Concession 2	Demo High	At						
	git		se All Shifts You Can Work:					
Football Concession_3	Demo High		- 11:00 AM (0 of 5 complete)					
			1 - 1:00 PM (0 of 5 complete) - 3:00 PM (0 of 3 complete)					
Hearing Tests	Adams	Cle						
	Elementary			Cancel Submit				

**Displays Available Opportunities From Selected Schools** 

After Sign-up Opportunities Are Moved To 'Hours' Tab For Logging

# **Volunteer List Email Sign-up**

	ilter/Search A fy Opportun		Go	*Administration E		Choo	ose a G	roups Filter 🔻		Athletic	s			•	
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							~		~		~		~		
	Contact	Partr	er	vipin.agarwal@arcscorp.com	720-989-8195	07/01/2015		03/21/2016		08/16/2016		07/12/2016		Log Hours	Voluntee
	Franke	Mark		mfranke@relatrix.com	970-668-9438	06/30/2015				07/05/2016		07/12/2016		Log Hours	Volunte
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#### Filter Volunteers & NOTIFY or EMAIL

NOTIFY = Select Opp From List [Uses Opp Template]

EMAIL = Copy/Paste URL From Opp List [Custom Msg]

### **Track Matched Volunteers & Hours**

Орр	ortunity Li	st																
View O	Opportunity Closed te Selected tct All	Go		Adams Elementar	ý	¥												
	ID	-	Name 👻	School		Туре 🔄	Start On	-	#Hours	-	#Volunteers	-	Status	Get URL				
								~								TimeSheet	Detail	List
		11	School/Site Opportunity	Adams Elementary		Classroom	8/1/2015 7:00:			0		0	Logging	URL				
		2	Hearing Tests	Adams Elementary		Clerical/Offi	10/3/2016 9:00 AM	:00		0		4	Logging	URL				
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						Kuch	Jill				@relatrix.com		Adams Elemen	itary	09/19	9/2016 Mate	thed	0
						Support	De	no		mfra	nke@relatrix.com		*Administratio	n Building	09/19	9/2016 Mate	ched	0
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School Opportunities List Shows Hours & Matched Volunteers

Drill-down To View Details Of Matched Volunteers

Coordinators Can Notify, Remove, Log Hrs, Or Create Roster

# Track Shift Sign-up

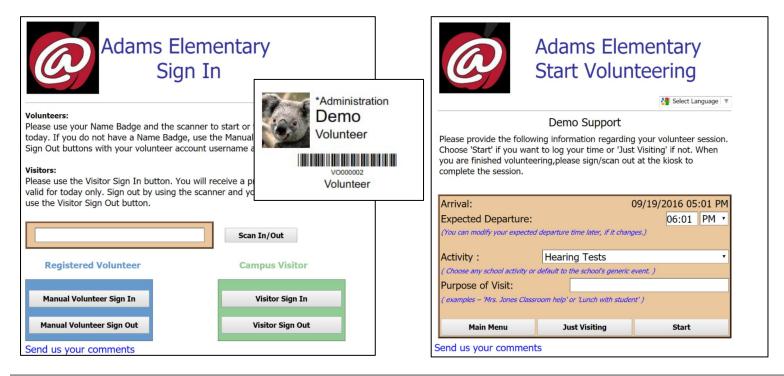
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				0	Cowd	en	Joe		jcowden@happybank.com		09/19/2016	
					Suppo	ort	Demo		mfranke@relatrix.com		09/19/2016	
					Kuch	hi	Jill		jkuch@relatrix.com		09/19/2016	

#### Forms List Displays Responses For Shift Sign-up

Click Responses To View Who Signed Up For A Shift

Export (By Users) To Download Excel File

# **EZVolunteer Kiosk**



#### Volunteers Sign-in With Account Details Or Name Badge

Select From Available Activities To Sign-up & Log Hours

### **Take Aways About Opportunities**

- ★ School/Generic -vs- Event/Program
- ★ Event = One or Few Times; Copy & Add To Calendar
- ★ Program = Recurring; Display In Kiosk
- ★ Volunteer Limit Will Display 'FULL' To N+1 Sign-up
- ★ Available Opps Move To Hours Page After Sign-up

### **Contact Details**

 ★ Relatrix Customer Support 866.670.6399
 <u>support@relatrix.com</u>

★ Mark Franke – Relatrix Account Contact 800.570.6234 x501 or 720.989.8195 <u>mfranke@relatrix.com</u>

