Char-Em United Way

Quick Guide to *Volunteer Connections* Website

Overview

STEPS TO REGISTER YOUR AGENCY:

If someone else has already registered your agency, do NOT register again.

1. Go to www.charemunitedway.org.
2. Click on "Volunteer" near the top right of the page, in the blue box.
3. Scroll down and click on the link "Volunteer Connections for Agencies" Click "Sign-in to Volunteer Connections"
4. You will be sent to the Agency Login Screen
5. Scroll down to "New Agencies" and click on "Register here!"
6. Follow the instructions given to register. This process takes approximately 15 minutes – you will need to know the following:
   - Parent organization name (optional)
   - Your employer's identification number (EIN)
   - Agency mission/vision
   - Detailed description of agency
   - History of Agency
   - Contact information including phone, fax, email, Web Site, and street address

7. Be sure to note your agency login and password for future use. Subsequent logins on the site will require that users from your agency enter the login and password exactly as they have been registered, and passwords are case-sensitive.

Note: you can upload your agency logo as long as it is a .gif or .jpg file that is 32 KB or less.

STEPS TO LOG IN:

*If you just registered you should already be logged in***.**

1. Go to www.charemunitedway.org
2. Click on "Volunteer" near the top right of the page, in the blue box.
3. Scroll down and click on the link "Volunteer Connections for Agencies"

Note: you can also bookmark the address:

www.volunteer.united-e-way.org/charemunitedway/ agency/

4. Under “Registered Agencies” enter your complete agency name and password (both must be entered *exactly* as registered on the system and are case-sensitive)
5. If you have forgotten your password click on “Forgot your password?” and you will receive assistance.

VIEWING YOUR AGENCY AND OPPORTUNITIES INFORMATION:

1. Follow steps to log in.
2. As soon as you log in as an agency, you will be looking under the “Overview” tab.

3. Underneath the “Tasks” heading on the Overview page you will find important information, including notification of expired listings and a chance to update these listings.

     NOTE: If you have no expired listings, the system will give you your new referrals. If there are no new referrals and/or no expired listings, the “Tasks” heading will be blank beneath it.

If there are expired listings:

On-going listings expire after one year, one-time listings expire after the event date - they are not deleted, so you can reactive them if you wish by updating the information.

1. Clicking on “Update this listing” will give you a brief overview of this listing since it was posted. Also how many times your listing was looked at, when it expired, and when it was approved.

2. Under “Update this listing”, you will also see three options that are available to you:
    - Get Feedback
    - Turn into ongoing/one-time opportunity
    - Delete this listing

   * Each option you click will take you through step by step to do any of the three above.

Inputting Opportunities:

1. Click on the “Opportunities” tab. This will show you current opportunities that you have listed (if any).
2. You can add an opportunity by choosing 1 of 2 categories:
    - One-time opportunity
    - Ongoing opportunity
3. After selecting your type of listing, you will be taken through the necessary steps to set up your opportunity listing. When you are finished inputting the details, you will be able to view your listing as a potential volunteer would see it.

***<u>Tips for Generating the Most Interest for Your Opportunity</u>**

* Shorter is better – communicate only what the volunteer needs to know – time, place, skills. Don’t include the entire mission statement of the agency in your opportunity.

* Think of yourself as “selling” the opportunity to the volunteers. Make it interesting, use action verbs and interesting punctuation.

* Read it out loud to someone to make sure it is clear and captivating.

* Use common words so volunteers looking for opportunities via search engines (Yahoo, Google) find your listings. Popular word choices include: volunteer, charity, community, program and donate.

Deleting Opportunities:

1. Click on the "Opportunities" tab. This will bring you to a chart that lists your opportunities
2. To the right you will notice a "Details" window, click on that.
3. You will have the option to:
   - Get Feedback
   - Turn into ongoing/one-time opportunity
   - Delete this listing
4. Choose "Delete"
5. The system will ask you if you are sure you would like to delete this listing. It will also give you the option to cancel.
6. Choosing "Yes" will take you back to your listings, hitting "Cancel" will also.

Editing Opportunities or Agency Information:

1. Click on "Agency Listing" for agency-related changes
2. Click on "Opportunities" tab then "Details" (beside the specific opportunity name) for opportunity-related changes
3. Both tabs will have a number of headings that read down the screen, with information beneath each.
   * Headings include: "General Information", "Contacts", "Specific Qualities", "Primary Contact" etc.
4. At the bottom of each heading section, you will also see an "Edit" option.
5. Choose "Edit"
6. By choosing "Edit" you will be sent to the information input screen for that section. You can then make you changes, save them, and view.

   **Hint: If you have an annual event, you can use the same listing time after time and just edit the information that has changed (such as date, time, place, etc) by following the updating directions above.*

REPORT GENERATION & STATISTICS:

View Statistics

1. To view statistics, click on the "Overview" tab.
2. At the bottom of the Home screen, under "General Administration", click on "View statistics on your listings."
3. The statistics given are:
   a. How many times your agency listing has been seen by volunteers (aka the number of hits).
   b. A breakdown of the number of agency hits according to month/year.
   c. How many times you opportunities listings have been seen by volunteers.
   d. A breakdown of the number of opportunity hits according to month/year.
4. Under the "Agency Listing" tab you can see:
   a. When your listing was approved.
   b. When your listing expires.

Generate Reports

1. To generate reports, click on the "Referrals" tab.
2. You can produce a number of reports based on what criteria you select.
3. Leave "Inquiry Status" as "All".

   **Inquiry Status is something you can set. It refers to a designation you can apply to people who inquire, such as active, inquired, complete (all-ready volunteered), expired, or not interested. All* *volunteers will remain "active" until you change their status.*

4. Under "Listing" select to view your agency listing, one of your opportunities, or all listings.
5. Select your starting and ending dates.
6. Click on "Go".
7. All of your referrals in the selected timeframe will appear.
8. Select all referrals to export and click "Export Records"
9. Then you can select all fields to export to an Excel file.

REMEMBER:

- ✓ Update your agency & opportunity information often so that it is very easy for volunteers to contact you.
- ✓ Contact information – phone and email
- ✓ Opportunity information
- ✓ Agency information
- ✓ Don't let your agency information expire – your agency will no longer be active on the site. Be sure to revisit the site often and make sure your listings are accurate and not about to expire.
- ✓ When entering a one-time opportunity, be sure to indicate the event date, otherwise your listing will be treated as inactive or expired.
- ✓ Always have at least one active opportunity for your agency.
- ✓ There is a lag time of several minutes between when you update information and when it appears updated on the site.
- ✓ All new listings must be approved by the administrator, which can take some time.

If you have any questions or need further assistance please contact ***Volunteer Connections*** at the Char-Em United Way office.

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