



## WELCOME TO VOLUNTEER UNITED

We are excited to introduce Volunteer United, a dynamic and engaging volunteer management tool. Volunteer United leverages the technology provided by Galaxy Digital to creatively engage and incentivize volunteerism among our nonprofit partners.

Below is a step-by-step user guide to help you navigate the system and maximize its potential to help you manage and engage volunteers. If you have any questions, please reach out to the Volunteer United team at [volunteerunited@uwcentralohio.org](mailto:volunteerunited@uwcentralohio.org). Together, we will fight poverty in Columbus!

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### Registration

Volunteer United is uniquely available to nonprofit partners of United Way of Central Ohio.

United Way of Central Ohio manages the initial activation of each nonprofit partner's profile. Upon activation, the nonprofits' volunteer managers will receive an email containing a password, a link to Volunteer United and a link to sign up to the Galaxy Digital's weekly agency managers training webinar.

Visit the Volunteer United website and select login tab on the top menu bar. Enter your email address and password to access the website. This is how you will access **both** your individual profile as well as your nonprofit partner's account.

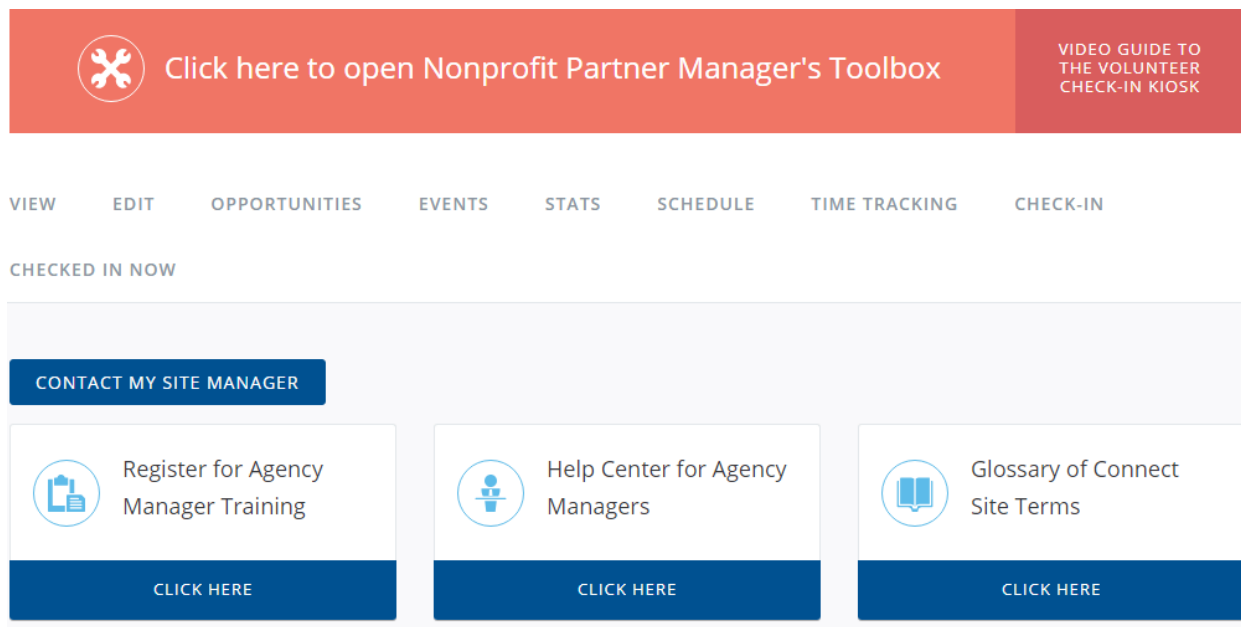
## Setting up your organization's profile

The Volunteer United website can be a great marketing tool for your organization. Each nonprofit partner has an individual profile to share information about the organization's mission, leadership, focus areas, social media accounts, photos and videos.

To access and edit your organization's profile, visit "my nonprofit partner" from the top of the menu bar:



The "Organization Manager's Toolbox" provides training tools and resources, including registration for weekly agency manager trainings offered by Galaxy Digital, posting your agency's needs and verifying volunteer hours.



The menu bar below the toolbox allows you to view and edit your organization's profile, enter volunteer opportunities, community events, access your stats and enter volunteer hours in time tracking.

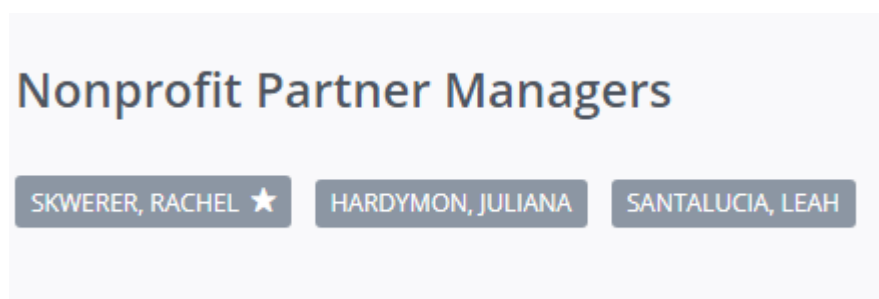
Elements that you can customize include:

**Logo:** 540px by 540px

**Focus Areas:** the issues served by your organization. The focus areas are assigned at an *organizational* level; later you will be able to select impact areas. Impact areas are similar to focus areas but are assigned at an *opportunity* level.

**Additional Nonprofit Partner Managers:** You will be able to assign additional organizational managers. Additional managers will first need to create an account in Volunteer United, using the sign-in button at the top of the main page.

The white star indicates the primary manager for your organization. To change the primary manager, click the star after the name, and reassign to another staff member.

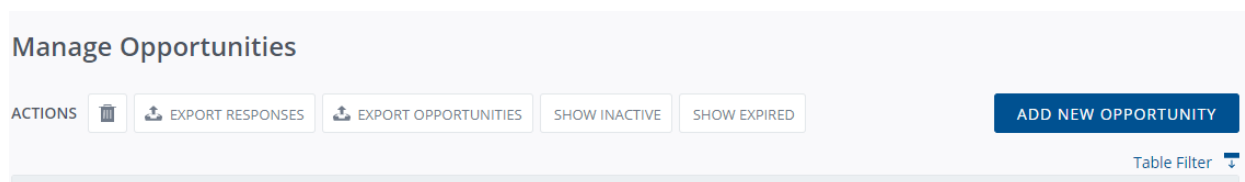


Feel free to use your profile page to tell your organization's story. You may upload a video link, add description of your organization and feature photos of your team in action. The description fields are WYSIWYG but also allow for .html customization. TIP: Save your work often!

## Your Volunteer Opportunities

*To add volunteer opportunities:*

Select "Opportunities" on your nonprofit profile. Then click add new opportunity to open the create opportunity form.



Complete the fields in the form as described below:

- **Title:** Enter an opportunity title
- **Description:** Enter a description of the opportunity. You can include information on background check or training requirements.

- **Privacy:** Select whether to make need public (available to all site visitors) or private (available only to assigned user group or via a private link)
- **Initiative:** Select the United Way of Central Ohio service effort (e.g., Columbus Volunteer Challenge) that is associated with the event.
- **Duration:** Select a duration. Options are Ongoing, Runs Until, Happens On, Multi-date, Custom Shifts, and Recurring Shifts. See table below for details.
- **Capacity:** If applicable, state the number of volunteer positions available
- **Allow Team Registration?** State whether you do or do not allow teams to register or whether you only want teams to register.
- **Attributes:** If you want to provide additional details that stand out from the above description (e.g., lunch provided), enter them here.
- **Impact Area:** Choose from United Way of Central Ohio's impact areas: good jobs, basic needs, student success, strong neighborhoods.
- **Additional Notification Recipients:** Provide email addresses for additional individuals who should be notified when volunteers register for opportunity.
- **Waiver:** Upload a waiver for volunteers to complete and sign, if applicable.

#### *Opportunity Duration Options*

| Opportunity Duration Type | When to Use  | Examples   |
|---------------------------|--|--|
| Ongoing*                  | Use when you're consistently looking for volunteers to fulfill a certain task and timing is flexible. No end date. | "Mentor a child with Big Brothers Big Sisters"<br>"Organize donations at Star House"                                     |
| Runs Until*               | Use when an opportunity occurs for a specific timeframe. These do have a definite end date.                        | "Collect diapers for the YWCA Family Center"<br>"Assist seniors with snow removal with the Clintonville Resource Center" |
| Happens On                | Use when volunteer opportunity happens on specific date  | "Paint mural at Community Development for All People Fresh Market"   |
| Recurring Shifts          | Use when opportunity occurs in shifts and takes place at the same time daily, weekly, or monthly                   | "Greet blood donors at 5PM every Tuesday with American Red Cross"  |
| Custom Shifts             | Use when opportunities occur in shifts at different times within same day or at different times on different dates | "Prepare tax returns at 12:30 on Saturday or 6PM on Tuesday with Tax Time"   |
| Multi-date*               | Use this when your volunteer opportunities occur over several consecutive days.                                    | "Serve as a weekend camp counselor at Camp Mary Orton"   |

\*These need types do NOT appear on the opportunities calendar.

*If your opportunity Runs Until, Happens On, Multi-Date and Shifts:*

You will be shown fields for entering more information. Capacity, Hours, and Registration Closed date are optional.


- Once capacity has been met, the opportunity will be displayed as full and volunteers will no longer be able to see or respond to it. Those who already responded to it will be able to see the opportunity via their profile or link.
- If opportunity occurs at a certain time, you can enter this in the hours field.
- If you want to specify a registration cut-off date, provide that information in the **registration closed date** field.


*To edit and view existing opportunities:*


Once you have entered your volunteer opportunities, you can edit opportunity details, view the opportunity as volunteers would see it and review responses for each opportunity. You may also directly message volunteers for the specific opportunity.

[VIEW](#) [EDIT](#) [OPPORTUNITIES](#) [EVENTS](#) [STATS](#) [SCHEDULE](#) [TIME TRACKING](#) [CHECK-IN](#) [CHECKED IN NOW](#)

### Manage Opportunities

ACTIONS 


 EXPORT RESPONSES


 EXPORT OPPORTUNITIES

SHOW INACTIVE

SHOW EXPIRED




ADD NEW OPPORTUNITY

Table Filter 


| <input checked="" type="checkbox"/> | ID     | OPPORTUNITY TITLE  | PRIVACY | INITIATIVE | DATE                    | STATUS |
|-------------------------------------|--------|--|---------|------------|-------------------------|--------|
| <input checked="" type="checkbox"/> | 397167 | TEST Volunteer United Opportunity <br><a href="#">Edit</a>   <a href="#">Responses</a>   <a href="#">View</a> | Private |            | Runs Until Feb 28, 2019 | Active |













Select “responses” below each opportunity to view additional details and message attendees.

## Responses

ACTIONS  EXPORT RESPONSES  ADD DEFAULT HOURS  MESSAGE RESPONDERS 

HIDE EXPIRED

Table Filter 

| <input checked="" type="checkbox"/> | USER             | TEAM                 | BEGINS                 | OPTIONS   |
|-------------------------------------|------------------|----------------------|------------------------|---|
| <input checked="" type="checkbox"/> | Juliana Hardyman |                      | Nov 24, 2018 @ 12:00am |    |
| <input checked="" type="checkbox"/> | Elissa Francis   | UWCO Christmas Elves | Nov 24, 2018 @ 12:00am |    |
| <input checked="" type="checkbox"/> | Joshua Hartley   | UWCO Christmas Elves | Nov 24, 2018 @ 12:00am |    |
| <input checked="" type="checkbox"/> | Mary Birchard    | UWCO Christmas Elves | Nov 24, 2018 @ 12:00am |    |

You have two additional options presented on the Opportunities page:

The screenshot shows two sections of a web interface. The top section, titled "Manually Add a Opportunity Response", contains a dropdown menu labeled "Select a Need", a text input field labeled "Volunteer Email", and another dropdown menu labeled "User Group". Below these fields is a blue button labeled "ADD MANUAL RESPONSE". The bottom section, titled "Opportunities Links", contains two rows. The first row is labeled "List of Public Opportunities" and shows a URL: [https://www.volunteerunitedcbus.org/need/?agency\\_id=92736](https://www.volunteerunitedcbus.org/need/?agency_id=92736). The second row is labeled "RSS Feed" and shows a URL: [https://www.volunteerunitedcbus.org/need/?agency\\_id=92736&rss=1](https://www.volunteerunitedcbus.org/need/?agency_id=92736&rss=1).

“Manually add an Opportunity Response” allows you to manually add volunteers that did not respond to your opportunity directly through the website or to add volunteers who attended but didn’t preregister. NOTE: even manual entries must be posted in response to a specific need that your nonprofit posted on the site.

“Opportunities Links” creates a URL for your organization’s opportunities. You can copy/paste the links to include in newsletters, social media accounts or in email signatures.

### *Deactivate an Opportunity*

Deactivate an opportunity when you no longer wish for an opportunity to be displayed. Volunteers will no longer be able to respond to the opportunity after it is deactivated. To deactivate an opportunity:

- In your manager view, click Opportunities. All of your agency or program's existing opportunities are displayed in a table under Manage Opportunities
- Check the box to the left of each need(s) you want to delete.
- Click on the "trash can" icon in the Actions row above the table.
- Click Yes to confirm that you are deactivating the opportunities.

To view an inactive need, click the Show Inactive button.

**Manage Opportunities**










ACTIONS   EXPORT RESPONSES  EXPORT OPPORTUNITIES **SHOW INACTIVE** SHOW EXPIRED ADD NEW OPPORTUNITY

Table Filter 

|  ID     | OPPORTUNITY TITLE  | PRIVACY | INITIATIVE   | DATE                    | STATUS |
|--|--|---------|--|-------------------------|--------|
|  397167 | TEST Volunteer United Opportunity <br><a href="#">Edit</a>   <a href="#">Responses</a>   <a href="#">View</a> | Private |  | Runs Until Feb 28, 2019 | Active |
|  385753 | Christmas Cares/Unions Share<br><a href="#">Edit</a>   <a href="#">Responses</a>   <a href="#">View</a>  | Public  | Season of Service  | Is Ongoing              | Active |

## Your Events

An “event” is an occasion that the community is invited to attend, such as a fundraiser, meeting or workshop. Click the “events” tab to add, change or manage your events and event RSVPs.

## Automatic Email Responses

Volunteer United will generate email responses for certain user actions such as registering for an opportunity. It also reminds nonprofit managers of actions needed and of important updates to the system. These will come from [volunterunited@uwcentralohio.org](mailto:volunterunited@uwcentralohio.org).


## Data and Reporting on Volunteer Hours


To view opportunity responses, page views and fans of your organization, select “stats” from the menu bar. You can view total fans and page views over a given date range; you may also see active opportunity responses and hours for your organization and export this data.

VIEW EDIT OPPORTUNITIES EVENTS **STATS** SCHEDULE TIME TRACKING CHECK-IN CHECKED IN NOW

**Nonprofit Partner Stats**


Start  End  SUBMIT DATE RANGE

 **65**  
TOTAL FANS

 **19**  
PAGE VIEWS

You can use these reports to get a sense for how much activity your Nonprofit Partner has had between the dates you supply.

**Active Opportunity Responses** EXPORT OPPORTUNITY RESPONSES

Table Filter 

| RESPONSE | OPPORTUNITY | OPPORTUNITY NAME                            | BEGINS          | RESPONDENT        | EMAIL  |
|----------|-------------|---|-----------------|-------------------|--|
| 2049081  | 385753      | Christmas Cares/Unions Share                | ongoing         | Hardymon, Juliana | <a href="mailto:julianahardymon@gmail.com">julianahardymon@gmail.com</a> |
| 2063851  | 389580      | Wrap and Sort Presents for Children in Need | 12/13/18 8:30pm | Hardymon, Juliana | <a href="mailto:julianahardymon@gmail.com">julianahardymon@gmail.com</a> |

SHOWING 1 TO 2 OF 2 ENTRIES PREVIOUS NEXT

The stats page on an organization's profile displays the stats for all opportunities with your organization. To view responses for a specific opportunity, navigate to the opportunities tab instead.

## Managing Volunteer Hours

We encourage all volunteer hours to be tracked in the Volunteer United system. This will allow your organization to take advantage of any sponsored "boosts" and improves the overall impact of the program.

### Option 1: Volunteer submits their own hours

The overall process is that volunteer responds to opportunity, volunteers, tracks hours and submits hours for approval. The nonprofit manager then approves each volunteer's hours.

To approve hours submitted to your nonprofit, visit your profile and select time tracking. Then either approve or deny the submitted volunteer hours.

| Volunteer Hours   |              |                  |      |                                   |       |         |   |
|---|--------------|------------------|------|-----------------------------------|-------|---------|---|
| ACTIONS <input checked="" type="checkbox"/> APPROVE <input type="checkbox"/> DENY |              |                  |      |                                   |       |         |   |
| Table Filter  |              |                  |      |                                   |       |         |   |
| <input checked="" type="checkbox"/>   | DATE START   | VOLUNTEER        | TEAM | DETAILS                           | HOURS | STATUS  | SOURCE  |
| <input checked="" type="checkbox"/>   | Jan 31, 2019 | Juliana Hardyman |      | TEST Volunteer United Opportunity | 2.00  | Pending | Added at: /user/hours/<br>by Juliana Hardyman |
| TOTALS  |              |                  |      |                                   | 2     |         |   |

### Option 2: Nonprofit partner adds volunteer hours

|  |   |
|--|---|
| <b>Hour Type</b><br><input checked="" type="radio"/> Opportunity Response<br>Opportunity *<br>TEST Volunteer United Opportunity<br>Opportunity Date: Feb 28, 2019<br>Volunteer *<br>Select a Volunteer | <b>Hour Details</b><br>Date Volunteered *<br>MM/DD/YYYY<br>Hours Worked *<br>3.5<br>Miles Traveled<br>2.2 |
| <b>Description</b><br>Brief Description  |   |
| <input type="button" value="SUBMIT HOUR ENTRY"/>   |   |



A note about registrations: We do permit you to link to external reservation sites, should you so desire. Volunteers would still be required to respond to the opportunity and track their hours in Volunteer United for your organization to take advantage of any boost dollars.

### Additional Resources:

Galaxy Digital Solutions (select Agency and Program Managers)

<https://galaxydigital.freshdesk.com>

Volunteer United FAQs and Resources

<http://uwcentralohio.galaxydigital.com/nonprofit-resources>

### Contact Us

The best way to submit questions is to email [volunteerunited@uwcentralohio.org](mailto:volunteerunited@uwcentralohio.org). Multiple individuals monitor this account and will respond in a timely manner.

*Agency Toolkit adapted from United Way of King County and Galaxy Digital Solutions.*