

VolunteerMatters365<sup>™</sup>



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# **Register Your Organization**

Create your organization's free VolunteerMatters365<sup>™</sup> account at https://volunteer.chcimpact.org/register/organization

VolunteerMatters365 Powerd by CHC : COMMUNITIES CHC : COMMUNITIES CHC : COMMUNITIES
Welcome! Let's post your projects here. Simply register here, post your opportunities via Golden, and enjoy automated scheduling and tracking for free.
Have an account already? Sign in and post.
Organization Name
Organization name
First Name
Tim
Last Name
Golden
Email Address
Password
Organization type
Nonprofit
Organization Website
http://www.ourorganization.com
Request to become a partner?
Sign up
Powered by 💙 Golden

# New Account Tips

## NAMING CONVENTION

When registering your organization please use the same organization account name, if possible, listed on your Charity Partner Portal account Profile, which can be found here: <u>https://info.chcimpact.org/charity-partner-portal/</u> profile

Bookmark this link to access your dashboard after you have registered:

https://dashboard.goldenvolunteer.com/?#dashboard

## **VOLUNTEER CONTACT**

Please go to your Charity Partner Portal account Profile to add a contact to the Volunteer Contact role on your account. CHC: Creating Healthier Communities will send VolunteerMatters365<sup>™</sup> communications to this contact.

#### DASHBOARD NAVIGATION

To help you navigate the features on your user dashboard, please click on the Help menu option and view the video "Welcome to your Admin Dashboard:"

https://dashboard.goldenvolunteer.com/?#help

#### **SETTINGS**

In your dashboard, click on the Settings menu option, and add your organization's full address.

#### **OPTIONAL STEP**

Invite additional staff if multiple people will be managing your volunteer opportunities.

- From your Dashboard: Go to Settings > Users > Add User > Enter Email
- Assign each user a permission level

Note: Any Users you add must <u>Sign Up</u> for a free Golden account prior to accepting your invitation. Please ask them to not add your organization's name to their personal Golden user account; they should leave that field blank when registering.

-	A Overview			
	Opportunities	Settings		
C	L Volunteers			
Commu	l Insights	General Chapters P	Partners Users Integrations Website Tools	
	Organizations	ADD USER + Tell me abo	ut permissions	
	✗ My Profile	Name	Email	Permission
	Settings	Shelley Hayes	shayes@healthcharities.org	Admin



# Add An Opportunity

Adding a new opportunity is a simple process and does not take more than a few minutes if you have all the details and information on hand.

For more detailed instructions, please visit the Help menu option on your user dashboard. Here is where you will find links to short training videos and tips directly from Golden, the platform provider.

	A Overview			
	Opportunities	Opportunities		
(demo) C	L Volunteers	ADD OPPORTUNITY + ADD VOLUNTEER SESSIONS +		
Commu	l Insights	EXPORT OPPORTUNITY DATA		
	Organizations	Opportunities Cancelled Opportunities Recommend Invite Organizations		

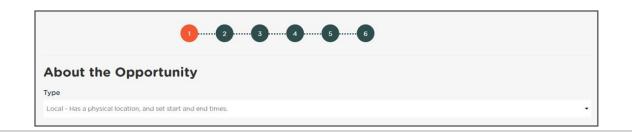
## **OPPORTUNITY STEPS**

Here are the steps to setting up a new opportunity, and samples are provided to help guide you through the process.

## **OPPORTUNITY TYPES**

There are two types of volunteer opportunities to select from: Local and Virtual

- LOCAL OPPORTUNITIES require a date, time and address. You can add as many time slots as necessary.
  - One day: Fundraising events that require extra help to keep things running smoothly. For example: Annual walks, runs, and fundraising galas.
  - Intern or Shift: On the job training for young adults, door greeter or regular meal delivery person.
  - Skilled Labor: Seek volunteers with specific skills like social media experts or professional services for select projects.





- VIRTUAL OPPORTUNITIES do not require you to enter a date or location and can stay active indefinitely.
  - Volunteer on the Spot opportunities can be completed virtually, in the office or at home. For example: creating snack packs, assembling care kits, or crafting cards for kids
  - Health on the Spot opportunities are the perfect place for your organization to showcase your educational programs or preview paid programs to companies. (This type of opportunity was formerly called Lunch and Learns.)
  - Wish List: Does your organization have an Amazon Wish List? You can add a Virtual opportunity and paste your Amazon wish list link into the Digital Location box.

#### AUDIENCE

Control who can view, share and sign-up for your opportunities by selecting one of the three audience types.

- Open: Anyone on the Golden platform can view and sign up, not just VolunteerMatters365<sup>™</sup> users.
- Private-Open: Only your Affiliates, pre-assigned Groups, and people you share the opportunity with can see these opportunities.
- Private-Closed: Restricted to the Groups and Affiliates that you pre-assign.

#### **AFFILIATIONS**

Please enter CHC: Creating Healthier Communities to the Affiliates section to allow all VolunteerMatters365<sup>™</sup> users to see your Private-Open opportunities and sign-up.

Note: You do not need to add an affiliate if the opportunity is set to Open.

About the Opportunity	
Туре	
Virtual - Has flexible location, and flexible start and end times.	
Opportunity Name	
Love Horses?	
Short Description	
Start your weekend in nature with horses.	
Audience	
Private open - Only affiliates can see the listing but non-affiliates can sign up	
Affiliations	
Community Health Charities (remove)	
Enter affiliations to allow them access to this opportunity.	
School, Company, etc.	



# Additional Tips

## **DIGITAL LOCATION**

Copy and paste your Amazon Wish List link here:

Digital Location (optional)

Where should Volunteers go to start?

Enter a website or other digital location...

#### VIBE

How will a volunteer feel in the moment at your opportunity? Examples: Tired but accomplished, challenged and touched, active and energized.

## PHOTO SUGGESTIONS & REQUIREMENTS

Photos should be horizontal (6.4 x 3.6 aspect ratio), colorful but not overwhelming, and depict the activities available.

## **BACKGROUND CHECKS**

You can ask Volunteers to complete a background check: Social Security Number and Document Identity verification; \$20 cost paid by the volunteer and good for one year.

## KEY WORD SEARCH, VISIBILITY AND MORE

Add an unlimited number of tags, list opportunities in chronological order of event date. When veiwing your opportunity, Volunteers are asked if they are DTV = Down to Volunteer!

#### **SUBMIT**

Once you have added your image and clicked submit, the Golden customer service team will review your Opportunity and either contact you directly with editing suggestions or they will approve it. Either way you will receive a notification on the status of your opportunity.

	A Overview	
	Opportunities	Overview
(demo)	L Volunteers	My Upcoming Time Slots My Ongoing Opportunities My Recommended Opportunities
Activity	al Insights	Intern Opportunity 🦉 Wednesday, May 29th, 2019, 10:00AM - 12:00PM 🕑 💉 💻 📹 💼
Commu	Organizations	
Fatts L.	🗲 My Profile	Confirmed Affiliates: 0 Confirmed Others: 0 Available Spots 2
	🌣 Settings	



# Managing Your Opportunities

You can manage your Opportunities from either the Opportunities tab or the Overview tab. Just click on the appropriate icon in the top right corner of the Opportunities preview window to open the tool.

#### SHARE INDIVIDUAL OPPORTUNITIES

Sharing your individual volunteer opportunities is easy. In your dashboard, click the Opportunities tab, find the individual opportunity you wish to share, then click on the Share icon. This will create a link for you to copy and paste into an email or post on social media.

#### SHARE ALL OPPORTUNITIES

There are two options to share all of your Open opportunities. Begin by clicking on the Volunteers tab on your dashboard, and then click on Invite.

- Option 1: Share a Link Copy and share a link with your Volunteers to find all of your Open opportunities.
- Option 2: Invite by Email Download the sample spreadsheet provided. Complete the columns First Name, Last Name and Email for each volunteer. Upload the updated spreadsheet file, and use the automated email language provided by Golden or customize the subject and/or body of your email. A link to download the app will be provided beneath your message.

Note: Volunteers must register for a free Golden account to sign up for your opportunities.

A Overview	Volunteers
Opportunities	Volunteers Invite Groups
L Volunteers	Option 1: Share a Link
al Insights	If you'd like to share a simple link with your network that will allow them to find your Opportunities, grab one here:
Organizations	Option 2: Invite by Email
🗲 My Profile	Step 1
Settings	Download the sample spreadsheet. Complete the columns First Name, Last Name and Email for each volunteer.
(?) Help	Step 2
🖒 Sign Out	Upload the updated spreadsheet file. Choose File No file chosen
	Step 3 (Optional) Customize the subject and/or body of your email. A link to download the app will be provided beneath your message.



# Tracking Attendance

## **CHECK-IN KIOSK**

From your Dashboard's Overview page, you can launch a "Check-in Kiosk" to manage attendance (and add last-minute attendees) onsite. This works well on a tablet, mobile phone or desktop computer.

If Organizers don't confirm or deny attendance within three days after the event, Golden automatically asks the Volunteer, by email, to confirm whether they attended or not. If you don't have the chance to use the Kiosk, you can confirm volunteer attendance after the fact in the Dashboard (either using the notifications that pop up after an event on the right side of your screen or in the Opportunity Detail page).

Q Search First Name Joe	Last Name + Sherrill	Check In Check In Check Out
		Check In
Joe	Sherrill	
Stephen	Sherrill	Check In Check Out
Jeff	Test	Check In Check Out

## **GPS CHECK-IN**

On the day of your event, if the volunteer is using the app and has set their profile to allow GPS tracking, they will automatically be checked in once they arrive at the location.



# Insights and Exports

From your dashboard click on Insights > then click on Opportunities to see the Key Performance Indicators (KPI) for each individual opportunity.

Just above Summary is a drop-down menu of all opportunities your organization has created. You can view the KPI for each opportunity individually or select All Opportunities from this menu to see a combined total.

Note: The ability to export this data is not available with the free plan, but you are able to copy and paste into an Excel spreadsheet.

A Overview	
📙 Opportunities	Insights
L Volunteers	
al Insights	My Organization Opportunities Affiliate Volunteers
🗲 My Profile	Updated: 10-16-2019, 12:44PM Insights are currently being updated, please check back in a few minutes for the most current data.
Settings	Card Making •
🤊 Help	Summary This is a summary of this Opportunity's performance to date.
🖒 Sign Out	
	Image: Construction     Image: Construct
	317 0 51 16 0 0 4 0.04 \$1.00
	90.0% New volunteers Returning volunteers

#### ATTENDANCE REPORTS

Export Attendance Sheets for individual Opportunities, including which volunteer is associated with which company. Go to the Volunteers tab and click on Export Volunteer Data. You will receive an email with an attached CSV report.

#### **ADDITIONAL REPORTS**

The platform provider offers upgraded plans, available for a fee, that include more data report exports. Contact CHC: Creating Healthier Communities to learn more about upgraded plans.

#### **UPGRADE**

An extended free trial and discounted rates are available for CHC's nonprofit partners, so please contact us for a referral to the platform provider to take advantage of these benefits.