

# **Manage Your Volunteer Programme**

# Course overview

During this three hour course you will be trained on using TeamKinetic on a day to day basis to manage your volunteers. There will be a number of short breaks throughout, giving you plenty of time to keep your tea replenished.

## Introduction

- Why use TeamKinetic?
- Types of system users

## Life cycle

We will cover the basic processes performed by each user type; volunteers, providers, and administrators.

## Overview of key functions

- Searching for volunteers
- Creating volunteer groups
- Inviting volunteers to register
- Creating volunteers
- Linking volunteers to providers
- Communicating with volunteers
- Managing an opportunity
- Creating Events
- Creating a provider
- Reports
- Help & support

## Common Queries and Questions

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# Lifecycle

The diagram below highlights the basic lifecycle that users follow. The steps highlighted in green indicate the training exercises you will be required to complete which are listed below.



Register → Create an opportunity



Authorise providers → Authorise opportunities



Volunteer Registers → Join opportunities → Attends opportunity → Log your hours

## Register a provider

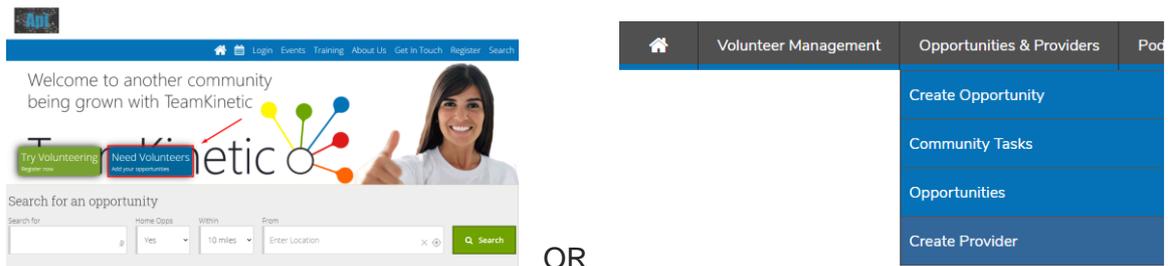
### Overview:

Every opportunity must be linked to a single provider, so you must have at least one provider added to your system before you can add an opportunity.

Your providers can either be internal to your organisation (either you or a work colleague) OR they can be external organisations who want to create opportunities and utilise your volunteer workforce.

### Location:

Register via homepage ADMIN LOGIN > Add manually



The screenshot shows the TeamKinetic homepage. At the top, there is a navigation bar with 'ADMIN' and 'ADMIN LOGIN' buttons. Below the navigation bar, there is a welcome message and a search bar. A red box highlights the 'Need Volunteers' button. To the right, a navigation menu is visible with 'Opportunities & Providers' selected, showing a sub-menu with 'Create Opportunity', 'Community Tasks', 'Opportunities', and 'Create Provider'.

OR

### How to:

Depending on how you plan to run your system, providers can either be added manually by administrators OR they can register themselves via your main homepage.

### TIP:

You can add custom questions to the registration pages here:

SUPER ADMIN MENU > CUSTOM QUESTIONS > ADD QUESTION

You can hide registration buttons from your homepage by going to:

SUPER ADMIN MENU > OPTIONS > REGISTRATION

### Notes:

No	Task	Complete?
1	Register as a (made up) provider from the main homepage.	

## Create an opportunity

### Overview:

Now it is your chance to create an exciting opportunity for your volunteers to join. For the purpose of this exercise, we will keep it nice and simple, but it is important that your providers do take their time and make their opportunities sound exciting whilst knocking down any mental barriers that may be preventing volunteers from joining the opportunity.

### Location:

PROVIDER MENU > OPPORTUNITIES > CREATE OPPORTUNITY

### How to:

Enter the information for your opportunity ensuring that the following options are setup as follows:

- Applying opportunity = No
- Choose SESSIONS at the bottom of the page (not flexible)

### TIP:

Your trainer will talk you through all these options shortly, but if you need reminding at a later date you can click on the question mark (help icon) in the top right and choose CREATING YOUR FIRST OPPORTUNITY, here you will be able to watch a video explaining all of the options on the page in detail.

### Notes:

No	Task	Complete?
2	Create a (made up) opportunity  Opportunity Setup: Applying Opportunity = No Opportunity Type (2 boxes at bottom of screen) = SESSION BASED	
3	Take this time to have a look around the opportunity functions and familiarise yourself with each of the options in the left side menu.	

## Authorising providers & opportunities *(completed by your trainer)*

### Overview:

Now that you have registered as a provider and created an opportunity, it is the job of the administrator to authorise the provider and opportunity, this is the final step before they are made visible to the public. **For the purpose of the training session your trainer will complete this step for you.**

### Location:

#### ADMIN DASHBOARD > AUTHORISE BUTTONS

The screenshot shows the Admin Dashboard with the 'Opportunities & Providers' tab selected. The dashboard displays a summary of key metrics: 6 Registered volunteers, 7 Registered providers, 19 Logged Hours, 9 Open Opportunities, and 142 Sessions. Below the metrics, there are three sections for authorisation: 'Opportunities For Authorisation', 'Providers for Authorisation', and 'Volunteers for Authorisation'. Each section has a 'VIEW ALL' link and a list of items. In the 'Opportunities' section, 'Gymnastics Coach' is listed with 'Manage' and 'Authorise' buttons. In the 'Providers' section, 'Trechum Park' is listed with 'Manage' and 'Authorise' buttons. Red arrows point to the 'Authorise' buttons in both sections.

### How to:

When you first login as an administrator you will land on the dashboard (shown above), just click on the relevant **Authorise** button. You can always get back to the administrator's dashboard by clicking the **Home** button in the top left.

### TIP:

You can decide whether you want to **auto authorise** opportunities and providers via the super admin menu.

SUPER ADMIN MENU > OPTIONS > AUTOMATION

### Notes:

No	Task	Complete?
4	Your trainer will authorise your new provider and opportunity	

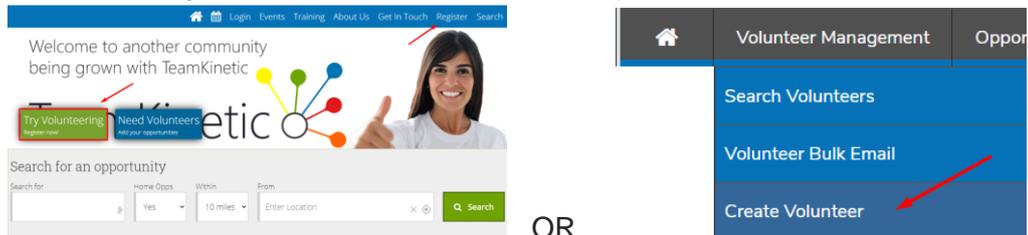
## Register as a volunteer

### Overview:

Now it's time to play the role of the volunteer and register.

### Location:

Register via homepage ADMIN LOGIN > Add manually



OR

### How to:

Depending on how you plan to run your system, volunteers can either be added manually by administrators OR they can register themselves via your main homepage.

### TIP:

You can add custom questions to the registration pages here:

SUPER ADMIN MENU > CUSTOM QUESTIONS > ADD QUESTION

You can hide registration buttons from your homepage by going to:

SUPER ADMIN MENU > OPTIONS > REGISTRATION

### Notes:

No	Task	Complete?
5	Think of your favourite childhood hero and register as a volunteer using their details.	

## Join your opportunity

### Overview:

Now your volunteer is registered on the system, you are free to join your opportunity.

### Location:

VOLUNTEER MENU > SEARCH

### How to:

Click on the **DETAILS** button next to your opportunity, then click on the **JOIN** buttons next to the sessions you want to join.

### TIP:

If you prefer to check volunteers first, you can opt to **authorise volunteers** before they can join any opportunity (the same way the administrator authorises new providers and opportunities):

SUPER ADMIN MENU > OPTIONS > AUTOMATION > ALLOW ACCESS TO NEW VOLUNTEERS

### Notes:

No	Task	Complete?
6	Search and join one or more sessions on your opportunity	
7	<p>In reality, this is the point where the volunteer would <b>attend the opportunity</b>.</p> <p>To replicate this <b>your trainer</b> will change the date of a session (that you have joined) into the past.</p> <p>When your trainer has confirmed that they have done this, you should refresh your web page by pressing <b>F5 on your keyboard</b>.</p>	

## Log Hours

### Overview:

Logging hours is a critical measurement of how much volunteering is taking place. Both volunteers AND providers log hours and both numbers are recorded separately in the system.

The **most important number is the provider logged hours**, as this is used for all the reports and incentives built within the system.

Logging hours is a similar process for both volunteers and providers, but for the purpose of this training session we will log the hours on behalf of the volunteer.

### Location:

VOLUNTEER MENU > OPPORTUNITIES > LOG button (next to your opportunity)

### How to:

After you have clicked on the LOG button next to your opportunity, click on the text saying 'Rate the opportunity and leave some feedback'.

Before you can log any hours we ask that you [rate the opportunity and leave some feedback](#) 

This helps us improve opportunities and create a better experience for other volunteers and your feedback is vital, thank you

Click **Yes** to attending the opportunity.

Click **Yes** to 'I would recommend this to other volunteers'

Type your thankyou message to the provider with any recommendations.

Click the **leave feedback** button.

### TIP:

Volunteers/providers only have to leave feedback the first time they log hours on an opportunity BUT they can add additional feedback at a later date if required.

### Notes:

No	Task	Complete?
8	Acting as the volunteer, leave feedback and log the hours for the session.	

# Key Functions

## Searching For Volunteers

### Overview:

If you are searching for a **single volunteer**, we advise using the global search box at the top of your admin page. Start typing the name of the volunteer and then select them from the list.

If you are searching for **multiple volunteers** who meet certain criteria, we advise using the SEARCH VOLUNTEERS page.

### Location:

ADMIN MENU > VOLUNTEER MANAGEMENT > SEARCH VOLUNTEERS

### How to:

Select the desired filter from the dropdown list and click the ADD button, then select the filter values and click SEARCH.

To view a volunteer's information, click on the volunteer's name. To perform an action against a group of volunteers simply select the check boxes on the left of the volunteer/s name, then select the action from the blue section at the bottom of the page.

### TIP:

Get familiar with the filters they will allow you to identify some useful groups of volunteers including 'Which volunteers have not logged in for over 3 months

### Notes:

No	Task	Complete?
9	Find your volunteer by name and reset their password	
10	Your volunteer is <b>owed 8 hours</b> from previous volunteer experience (done outside the system), add 8 'Owed Hours' to your volunteer.	
11	Link your volunteer to a provider	
12	Find all <b>Male</b> volunteers <b>over 20 years</b> old and send them an email.	
13	Find all volunteers who's last Login Date is more than 100 days ago	

## Creating Volunteer Groups

### Overview:

Volunteers can be put into groups making it easier to communicate with them and also restrict opportunities to specific groups of volunteers.

### Location:

ADMIN MENU > VOLUNTEER MANAGEMENT > VOLUNTEER GROUPS

### How to:

Add a 'volunteer group' via the volunteer groups screen (location above).

When you have created a group, you can add volunteer/s into that group via the **search volunteers page**, just select the checkboxes next to their names, then in the blue 'actions' section at the bottom, click **Change Group**, then select the group from the dropdown menu and click the **Add** button.

### TIP:

You can add volunteers to groups within the opportunities page (e.g. Add all volunteers on an opportunity to a specific group).

You can also send volunteers a registration link which automatically puts new volunteers in your desired group, this link is available on the volunteer groups page.

### Notes:

No	Task	Complete?
14	Create a group	
15	Add your volunteer to the group (via the search volunteers page)	
16	Add everyone on your opportunity to your group	
17	Send an email to everyone in your new group.	

## Inviting Volunteers To Register

### Overview:

Although volunteers can register naturally on your website (via the front page), you can also send out email invites. It is recommended doing this via your system as this way each invite is tracked allowing you to see if the volunteers have actually gone on to register.

### Location:

ADMIN MENU > VOLUNTEER MANAGEMENT > INVITE VOLUNTEERS

### How to:

Enter the email addresses of the volunteers you want to invite, make sure you **separate them with a comma**. Then click on the **invite** button

You can see which invited volunteers have gone on to register by clicking on **invited volunteers** in the side menu, they are marked with either a tick or cross in the **registered** column.

### TIP:

If you are uploading an excel file make sure you list all email addresses in column A and save the excel file as FILE > SAVE AS > **CSV**

### Notes:

No	Task	Complete?
18	Invite two volunteers using fake email addresses.	
19	Navigate to the screen where you can see if they have gone on to register.	

## Creating Volunteers

### Overview:

Some volunteers may not have email addresses OR may not have access to the internet. You can create volunteers without email addresses but they will not be able to login, so any updates or joining of opportunities must be done by the administrator.

### Location:

ADMIN MENU > VOLUNTEER MANAGEMENT > CREATE VOLUNTEER

### How to:

Enter the details of the volunteer into the relevant fields. When a volunteer is added in this way you may notice that the email and password fields are non-mandatory fields.

### TIP:

When these volunteers are added to an opportunity, they are highlighted to providers so they know to contact the volunteer via telephone.

### Notes:

No	Task	Complete?
20	Create a volunteer without an email address or password, using made up details	

## Linking Volunteers To Providers

### Overview:

In order for a provider to see a volunteer details, communicate directly with a volunteer or add a volunteer to one of their opportunities, the volunteer must be **linked** to the provider.

Volunteers are linked to a provider via the following methods:

- Registered via the providers profile page
- Invited by the provider
- Previously/currently on an opportunity offered by the provider
- Linked to provider by the administrator

### Location:

Go to the volunteer's profile page (type their name into global search box next to the LogOut button).

Goto **Groups & Linking** in the side menu.

In the **Linked To** section, type the name of the provider you want to link the volunteer to, then click **Create Link**.

### How to:

Enter the details of the volunteer into the relevant fields. When a volunteer is added in this way you may notice that the email and password fields are non-mandatory fields.

### TIP:

When these volunteers are added to an opportunity, they are highlighted to providers so they know to contact the volunteer via telephone.

### Notes:

No	Task	Complete?
21	Go to your volunteer's profile and <b>link</b> the volunteer to your provider	

## Communicating With Volunteers

### Overview:

One of the key benefits in using TeamKinetic is the ability to easily send communications to volunteers, either via SMS text, email or social media. There are numerous ways you can send out these communications, but this section will focus on sending an email to specific volunteers.

### Location:

ADMIN MENU > SEARCH VOLUNTEERS

### How to:

Click on the **checkbox** next to your volunteer's name, you will see the **blue actions bar** appear at the bottom of your screen.

Click on **Email** and then type a short message and click **Send**.

### TIP:

To send an email to a large number of volunteers you will need to use the **Volunteer Bulk Email** function (VOLUNTEER MANAGEMENT > VOLUNTEER BULK EMAIL)

As these are meant to be generic emails which are not specific to an opportunity or volunteer, only volunteers who 'opt in' to receiving bulk emails will receive these emails.

### Notes:

No	Task	Complete?
22	Send an email to your volunteer	
23	Send a bulk email to all <b>female</b> volunteers	
24	Send an email to all volunteers on your opportunity	
25	Send an email to volunteers on a specific session	

## Managing An Opportunity

### Overview:

A large part of managing a volunteer opportunity is ensuring that both you and the volunteers on the opportunity know when and where they are turning up.

From the opportunities page you can see all of this information and a large array of reports and communication options to assist you along the way.

### Location:

ADMIN MENU > OPPORTUNITIES & PROVIDERS > OPPORTUNITIES

### How to:

Go to the location (above) and click on the name of your opportunity.

### TIP:

To send an email to a large number of volunteers you will need to use the **Volunteer Bulk Email** function (VOLUNTEER MANAGEMENT > VOLUNTEER BULK EMAIL)

As these are meant to be generic emails which are not specific to an opportunity or volunteer, only volunteers who 'opt in' to receiving bulk emails will receive these emails.

### Notes:

No	Task	Complete?
26	Change the <b>time</b> of your <b>session</b>	
27	Manually <b>add</b> your volunteer onto a <b>session</b>	
28	<b>Log</b> any outstanding hours on your opportunity	
29	<b>Restrict</b> your opportunity to your volunteer <b>group</b>	
30	Leave a comment in the <b>chat</b> room	

## Creating Events

### Overview:

An event is a group of opportunities which have something in common. For example, you may be running a summer fair where you need volunteers to hand out refreshments, setup equipment and meet and greet the public. All three of these roles may start at different times and require different types of volunteers, for this reason they would need to be setup as separate opportunities, but all three opportunities would be linked to the same event. By linking them to a single event, volunteers can select the event in the search page which would take them to the events profile page, showing information and images related to the event, and also listing all the opportunities linked to the event at the bottom of the events page.

### Location:

ADMIN MENU > OPPORTUNITIES & PROVIDERS > EVENTS

### How to:

Go to the location above and click on the ADD button.

### TIP:

Events have their own unique web address which can be used when emailing volunteers regarding an event. By clicking on the events web address the volunteer will be directed to the events profile page, listing all information related to the event (which makes sense as that is what the email is about).

### Notes:

No	Task	Complete?
31	Add an event	
32	Attach a logo, image and description about your event.	
33	Edit your opportunity and link it to the event.  <b>NOTE:</b> To do this you will need to navigate back to your <b>opportunity page</b> and click on <b>details</b> , then change the option for <b>Part Of A Larger Event</b> to <b>Yes</b> .	

## Creating A Provider

### Overview:

Providers can either register themselves OR they can be manually added by an administrator. This section will take you through how to add a provider and trusted provider to your system.

### Location:

ADMIN MENU > OPPORTUNITIES & PROVIDERS > CREATE PROVIDER

### How to:

Go to the location above and enter details of a 'made up' provider.

### TIP:

Providers can only see and manage volunteers who are linked to them. Trusted providers can see and manage any volunteers on your system (so trusted providers must work within your organisation).

### Notes:

No	Task	Complete?
34	Create a new provider	
35	Find the web address for your providers <b>profile page</b>	
36	<b>Impersonate</b> the provider	
37	Complete the providers <b>profile page</b> information	

## Reports

### Overview:

Reports give you the ability to watch your volunteer programme grow and expand. Whether you are after simple volunteer numbers or a list of common search terms, you are sure to find what you are looking for in TeamKinetic's extensive reporting library.

### Location:

ADMIN MENU > REPORTING

### How to:

From the reporting menu you have access to an array of reports covering various aspects of your volunteering programme. Below is a basic breakdown of each reporting page from the main **Reporting** menu.

**Reports & Analysis** - General KPI information on volunteers, providers and opportunities

**Day Schedule** - what is happening on set days (e.g. next week)

**Custom Reports** - Custom reports can be built for your organisation (additional cost)

**Feedback** - A breakdown of feedback left by both volunteers and providers

**Maps** - Geographical map showing the location of volunteers and opportunities

**Download Data** - Download data from TeamKinetic to an Excel spreadsheet (CSV)

### TIP:

To see what volunteers are actually typing into the opportunities search page go to:  
REPORTING > REPORTS & ANALYSIS > OPPORTUNITIES > WEBSITE SEARCHES

You should regularly view this report making sure you are offering the types of opportunities that your volunteers are searching for, this process may involve **re-tagging** your existing opportunities according to this report.

### Notes:

No	Task	Complete?
38	View your opportunities and volunteers on the <b>map</b>	
39	Find the top 5 searched words entered into the search bar by volunteers	

## Help & Support

### Overview:

TeamKinetic is full of support features and content. Whatever the issue you are sure to find the answer either within the built-in help library OR by raising a support ticket.

### Location:

ADMIN MENU > HELP & SUPPORT

### How to:

Via the menu above, you can view a large array of tutorial videos and volunteer management resources. If you can't find what you are looking for then you could always raise a support ticket.

### TIP:

The Road Map shows a list of functions which may be added in the next update.

### Notes:

No	Task	Complete?
40	Join the TeamKinetic Facebook group in the <b>Volunteer Manager Resources</b>	
41	Vote on the next update features on the <b>Roadmap</b>	
42	Find the page where you would raise a <b>support ticket</b> to identify a bug (NOTE: Don't actually raise a support ticket)	

## Common Queries (optional section)

Now you have now covered all the main functionality within the TeamKinetic system, with your remaining time please work through as many of the following questions as possible. The questions include the most common scenarios and queries raised when using TeamKinetic to manage your volunteer workforce.

**Note:** You have been shown how to complete many of these tasks, but try your best using the help available and ask your trainer if you are still unsure.

No	Task	Complete?
43	<p>Create a flexible opportunity</p> <p><b>LOCATION:</b> OPPORTUNITIES &amp; PROVIDERS &gt; CREATE OPPORTUNITY</p> <p><b>TIP:</b> There are no sessions associated with a flexible opportunity, just a start and end date, so the system does not know how many hours the volunteer should have done. For this reason, flexible opportunities allow volunteers and providers to log their hours as and when they feel fit, and will require both parties to record a date next to the hours they log.</p>	
44	<p>Create an HourTrade Voucher</p> <p><b>LOCATION:</b> VOLUNTEER MANAGEMENT &gt; HOURTRADES</p> <p><b>TIP:</b> HourTrades allow volunteers to exchange their logged hours for rewards.</p>	
45	<p>Reset a provider's password</p> <p><b>LOCATION:</b> PROVIDERS PROFILE &gt; DETAILS</p> <p><b>TIP:</b> Providers, volunteers and admins can all reset their password themselves via the login pages.</p>	
46	<p>View your event profile page</p> <p><b>LOCATION:</b> OPPORTUNITIES &amp; PROVIDERS &gt; EVENTS &gt; LINK</p> <p><b>TIP:</b> If a volunteer clicks on the name of the event anywhere on the system, they will be directed to the relevant events profile page.</p>	
47	<p>View your provider profile page</p> <p><b>LOCATION:</b> IMPERSONATE PROVIDER &gt; ACCOUNT &gt; PUBLIC PROFILE &gt; PREVIEW YOUR PROFILE</p> <p><b>TIP:</b> If a volunteer clicks on the name of a provider anywhere on the system, they will be directed to the relevant providers profile page.</p>	
48	<p>Advertise an external course</p>	

	<p><b>LOCATION:</b> COURSES &gt; ADD EXTERNAL COURSE</p> <p><b>TIP:</b> The courses functions only allow you to promote courses, it does not record who has joined or attended a course.</p>	
49	<p>Add a news story</p> <p><b>LOCATION:</b> MESSAGING &amp; EMAIL &gt; NEWS &gt; ADD button</p> <p><b>TIP:</b> News is displayed in the centre of the volunteers landing page (the first page the volunteer sees when they login)</p>	
50	<p>Book a meeting for your volunteer</p> <p><b>LOCATION:</b> VOLUNTEER MANAGEMENT &gt; SEARCH VOLUNTEERS &gt; SELECT CHECKBOXES (next to volunteers) &gt; BOOK MEETING</p> <p><b>TIP:</b> You can view your upcoming meetings here: VOLUNTEER MANAGEMENT &gt; MEETINGS</p>	
51	<p>Add criminal record details to your volunteer (DBS/PVG)</p> <p><b>LOCATION:</b> VOLUNTEERS PROFILE &gt; PROFILE (near bottom of page)</p> <p><b>TIP:</b> TeamKinetic will remind you when criminal checks are due to expire.</p>	
52	<p>How many volunteers have achieved the first level of achievement badges? (Super Member)</p> <p><b>LOCATION:</b> VOLUNTEERS PROFILE &gt; PROFILE (near bottom of page)</p> <p><b>TIP:</b> TeamKinetic will remind you when criminal checks are due to expire.</p>	

## Course Feedback

We hope you enjoyed your training session. Please take the time to complete this training feedback form, any feedback is anonymous and will be used to improve future training sessions.

Feedback form: <https://teamkinetic.co.uk/trainingfeedback>