

GiftWorks®

Guide to GiftWorks Volunteers

If yours is like many organizations, volunteers play an important role in your day-to-day operations. Perhaps it is a small role, or perhaps volunteers are the lifeblood of your organization. In either case, it is important to manage and stay in touch with these important constituents.

GiftWorks Volunteers lets you use the powerful contact management tools that you already use in GiftWorks to maintain contact with your volunteers, manage your volunteers' job assignments, run reports, and track your volunteers' jobs and hours.

We hope this Guide to GiftWorks Volunteers helps you to get started right away. Additional help is always available in GiftWorks right where you need it. Simply click on the Help button on the upper right side of the screen.

What is a Volunteer?

A volunteer is anyone who donates time and work to your organization. In GiftWorks Volunteers, a volunteer is a donor to whom you add a volunteer profile.

Adding a volunteer profile to a donor lets you keep track of a variety of information about a volunteer, including:

- Whether the volunteer has been screened (and the screening result)
- The volunteer's current availability
- Current and past jobs the volunteer has done for your organization
- Number of hours the volunteer has worked (and when)
- The volunteer's skills

Creating a Volunteer Profile

To add a volunteer, the person must be listed as a donor in GiftWorks.

If the person is already listed as a donor: There are two ways to create a volunteer profile for the person.

1. Find the donor and click to see their full details page. Under the Summary tab, which is the page you land on when you click on a donor, click the "Create Volunteer Profile" link. Doing so will guide you through the few easy steps to create a volunteer profile.
2. Visit the Volunteers section of GiftWorks and click "Add a Volunteer" in the left blue menu and follow the instructions.

If the person is not yet listed as a donor: You need to record him or her as a donor. There are two ways to do so.

1. Visit the Donors section and click "Add a Donor," then follow the steps for If a person is already listed as a donor.
2. Visit the Volunteers section and click "Add a Volunteer" in the left blue menu. On the next screen, click "Add a New Donor," which will guide you through the steps of adding the donor and then creating a volunteer profile for the donor.

What Does a Volunteer Profile Include?

A volunteer profile includes the following information:

Volunteer Status: Once a volunteer has been screened and marked as Accepted (see How to Screen a Volunteer), he or she automatically becomes Active. Active volunteers can be assigned to jobs and will show up on volunteer reports.

If a volunteer decides to stop volunteering for your organization, either temporarily or permanently, you can mark his or her volunteer profile Inactive. This allows you to maintain the history of jobs and hours worked and other information about the volunteer, as opposed to deleting the volunteer profile, which deletes that information (see Note, below).

The statuses for a volunteer are unscreened, available, rejected, and inactive:

- **Unscreened** volunteers have a volunteer profile but have not yet been screened.
- **Available** volunteers have been screened, marked Accepted, but not marked Inactive. Available volunteers can be assigned to jobs.
- **Rejected** volunteers have been screened and marked as Rejected. To make a rejected volunteer available, he or she must be re-screened and marked Accepted.
- **Inactive** volunteers cannot be assigned to jobs. To assign an inactive volunteer to a job, he or she must be marked Active.

Please note that if you delete a volunteer profile, the history and other volunteer information is deleted, so deletion should be used with caution.

Volunteer Manager: If it is helpful, volunteers can be assigned a manager (either a staff member or another volunteer). The manager is listed in the volunteer profile. The list of volunteer managers can be changed in the Settings section of GiftWorks. In the Settings section, click Manage GiftWorks Volunteers, then click Modify Volunteer Managers.

One benefit of assigning a Volunteer Manager to a volunteer is that it allows you to create a SmartList of all volunteers managed by a particular person. Then, for example, if you need to send a mailing to all volunteers managed by one manager, you can easily do so.

Total Hours: This is the total number of hours volunteered by this person.

Phone: This is the volunteer's phone number.

Notes: Any information about the volunteer that you want to record, but that doesn't fit into one of the other fields, can be entered here.

Current and Past Jobs: This section offers a snapshot of a person's volunteer history. All of the jobs that the volunteer is currently working on, or has worked on in the past, are listed here.

Volunteer Availability: Specify the dates and times the volunteer is available to work, from very specific (September 18 from 12:30 to 1:30pm) to more general (3 hours per week, Mon.-Fri. between Noon and 5pm).

This availability is one of the factors used when you select "Find Volunteers for a Job" or "Find Jobs for a Volunteer" to determine which volunteers and jobs are the best fit.

Skills: Specify which skills this volunteer has that might be well-suited to certain jobs within your organization. Click on a skill on the Volunteer Profile page to see a list of other volunteers with the same skill.

GiftWorks Volunteers comes preloaded with a wide variety of skills and skill categories. In the Settings area under Manage GiftWorks Volunteers, you can choose which skills to display from that preloaded list and can add your own skills. The skills you select for a volunteer are one of the factors used to determine which volunteers and jobs are the best fit.

Screening Information: Before a volunteer can become active and be assigned to jobs, he or she must be marked as Accepted in the screening area of GiftWorks Volunteers.

Screening a Volunteer

To screen a volunteer, you must first add a volunteer profile. Then when viewing the profile of an unscreened volunteer, you will see a "Screen Volunteer" link at the top of the profile, next to the volunteer status. Clicking that link takes you to the screening process, where you can indicate the Screening Result (Accepted or Rejected), Screening Date, Screener, and any notes about the screening. Unscreened or Rejected volunteers cannot be assigned to jobs.

If a volunteer has already been screened, but you need to re-screen the volunteer or change the screening status of the volunteer, there is a "Screen Again" link on the left blue menu of the Volunteer Profile screen, which allows you to enter new screening information.

Each time you screen or re-screen a volunteer, the screening result is added to the Volunteer's interactions history, which you can view by going to his or her donor information page and clicking the Interactions tab.

Recording Volunteer Hours

When viewing a volunteer profile, you will see a "Record Hours Worked" link in the left blue menu. Click this link and follow the prompts to record hours worked by a volunteer. You can optionally link the hours to a Job.

When viewing a Job, click the "Record Hours Worked" link in the left blue menu to record volunteer hours for that job. You will be prompted to select the volunteer who worked the hours.

Adding a Job

Throughout the Volunteers section of GiftWorks, there are "Add a Job" links on the left blue menu. Click one of these links and follow the prompts to add a job. If you try to enter a job that has already been entered, GiftWorks Volunteers will notify you of any matches or close matches.

GiftWorks Volunteers Jobs

A GiftWorks Volunteers job includes the following information:

Job Name and Description: The name and optional description are the basic pieces of information to help you keep track of this job.

Details: The Details section contains Project, Job Status, Job Manager, and Total Hours.

Project: You can group similar or related jobs according to project. The list of projects can be edited in the Settings section of GiftWorks, under Manage GiftWorks Volunteers. Assigning a job to a project lets you organize and work with your jobs in a number of ways, including creating a SmartList for easy segmentation of your volunteers.

Job Status: You do not need to set the status of a job. It is calculated for you based on information you enter about a job. The statuses for a job are open, filled, closed, and inactive, described below:

- **Open** jobs have fewer assigned volunteers than the number of volunteers specified for the job (see Job Needs), and have not been marked as Inactive. As you add volunteers to a job, it will stay Open until you reach the specified number, at which point it becomes Filled.
- **Filled** jobs have the same number of assigned volunteers as the number of volunteers specified for the job (see Job Needs), and have not been marked as Inactive. If you assign additional volunteers to a filled job, GiftWorks Volunteers will increase the number of volunteers required for the job.
- **Closed** jobs are where all of the assignments have been marked as closed, and where the end date of the last closed assignment has past. A Closed job is also not marked as Inactive. If you need to re-open a job, edit that job and change the number of volunteers to 1 or greater.
- **Inactive** jobs have been marked inactive. A job in any other status (Open, Filled, Closed) can be marked as Inactive. Marking a job as inactive allows you to maintain the information and assignment history of that job, as opposed to deleting the job, which deletes all information and assignment history along with the job.

Please note that if you delete a job, the history and other job information is deleted, so deletion should be used with caution.

Job Manager: If it is helpful, jobs can be assigned a manager (either a staff member or another volunteer). The list of job managers can be changed in the Settings section of GiftWorks. Click Manage GiftWorks Volunteers, then click Modify Job Managers.

One benefit of assigning a Job Manager to a job is that it allows you to create a SmartList of all volunteers working on jobs managed by a particular person. Then, for example, if you need to send a mailing to all volunteers working on jobs managed by one manager, you can easily do so.

Total Hours: This is the total hours recorded for this job.

Job Needs: The Job Needs include both the number of assignments for this job and the date and time needs for this job.

The number of assignments is the number of volunteers you need to assign to this job to fill it. If you indicate that a job requires two or more volunteers, GiftWorks assumes the volunteers will be working at the same time to complete the job. If multiple volunteers will work different schedules to complete different parts of the job, the job should be entered as separate jobs.

The date and time needs for a job are the dates, days and/or times during which you need volunteers for this job. This is one of the factors used when you are matching volunteers and jobs.

Skills: These are the skills desired or required by this job. The list of skills and skill categories can be changed in the Settings section.

GiftWorks Volunteers comes preloaded with a wide variety of skills and skill categories. In the Settings area under Manage GiftWorks Volunteers, you can choose which skills to display from that preloaded list and can add your own skills. The skills you select for a job are one factor used to determine which volunteers and jobs are the best fit.

Volunteers Assigned to Job: This section lists the volunteers assigned to this job, their start and end dates, and additional information.

Assigning a Volunteer to a Job

When viewing a job, there is a link in the left blue menu to "Assign a Volunteer." Click this link to specify a particular volunteer to search for and assign, or to have GiftWorks Volunteers suggest volunteers that might be a good fit for the job.

If you know which volunteer you want to assign to the job, click "Assign a Specific Volunteer" and enter part or all of his or her name in the box below before clicking Next. GiftWorks will display all available or unscreened volunteers that match your search. If you click on a name and click Next, you can choose the start date for the volunteer's assignment to the job and can enter any comments about the assignment.

Please note that it is not necessary to enter an end date for the job assignment. You will enter an end date for the assignment when you close the volunteer's assignment (when the job is complete or if the volunteer is no longer going to work on the job).

To have GiftWorks Volunteers suggest the volunteers who might be the best fit for the job, click "Let GiftWorks show potential volunteer matches" and then click Next. GiftWorks will check through the list of Available and Unscreened Volunteers and rank them Low through High based on compatible availability and skills. The comments column will display additional information about specific matches between skills or availability.

Use the "Assign" button at the bottom to assign the selected volunteer to the job, or the "View Volunteer Profile" button to see more information about the selected volunteer.

Use the options in the Search Parameters box at the top right of the screen to change the parameters that are used to match volunteers to jobs. You can choose whether to show or hide volunteers who are lacking required skills for the job in question. You can also choose whether to show or hide volunteers who are already assigned to other jobs. You can specify the number of results to show on the matching screen, which can be helpful if you have many volunteers in GiftWorks Volunteers.

Assigning a Job to a Volunteer

When viewing a volunteer, there is a link in the left blue menu to "Assign Volunteer to a Job." Clicking this link allows you to either specify a particular job to search for and assign the volunteer to, or to have GiftWorks Volunteers suggest jobs that might be a good fit for the volunteer.

If you know which job you would like to assign the volunteer to, click "Assign a specific job position" and enter part or all of the job name in the box below before clicking Next. GiftWorks will display all open jobs that match your search. If you click on one and click Next, choose the start date for the volunteer's assignment to the job and enter any comments about the assignment. Note that it is not necessary to enter an end date for the Job assignment. You will enter an end date for the assignment when you close the volunteer's assignment (when the job is complete or if the volunteer is no longer going to work on the job).

To have GiftWorks Volunteers suggest the jobs that might be the best fit for the volunteer, click "Let GiftWorks show potential job matches" and then click Next. GiftWorks will check through the list of open Jobs and rank them Low through High based on compatible time needs and skills. The comments column will display additional information about specific matches between time needs and skills.

Use the "Assign" button at the bottom to assign the volunteer to the selected job, or the "View Job Details" button to see more information about the selected job.

Use the options in the Search Parameters box at the top right of the screen to change the parameters that are used to match jobs to volunteers. You can choose whether to

show or hide jobs where there are no skill matches to volunteers. You can also specify the number of results to show on the matching screen, which can be helpful if you have many jobs in GiftWorks Volunteers.

Volunteer SmartList Criteria

GiftWorks Volunteers includes SmartList criteria that you can use to create SmartLists of volunteers. Because volunteers are also donors, the criteria are listed along with the individual donor criteria. The following criteria are available (listed under Volunteer Information):

Volunteer Screening Date

The date on which a volunteer was most recently screened.

Volunteer Status

The status of the volunteer.

Volunteer Manager

The volunteer manager of the volunteer.

Skills

The skills listed for a volunteer.

Most Recent Date of Service

The most recent date on which the volunteer has hours recorded.

Earliest Date of Service

The earliest date on which the volunteer has hours recorded.

Any Date of Service

Any date on which the volunteer has hours recorded.

Total Hours Worked

Total hours recorded for the volunteer.

Total Hours Worked Last Year

Total hours recorded for the volunteer last calendar year.

Job Name

The name of any job to which the volunteer has an assignment (current or past).

Partial Job Name

Any part of the name of a job to which the volunteer has an assignment (current or past).

Project

The project of any job to which the volunteer has an assignment (current or past).

Job Manager

The manager of any job to which the volunteer has an assignment (current or past).

Assignment Completion

Whether the volunteer has completed any job assignment(s).

Volunteer Availability

Whether the volunteer has availability defined for the specified date range.

Job Assignment Date

Whether the volunteer has a job assignment during the specified date range.

Volunteer Mailing Fields

To make it easier for you to communicate effectively with your volunteers, GiftWorks Volunteers includes several fields that can be inserted into mailings (letters or emails, for example). These fields are available in any Donor letter template. To access Donor templates, click the Mailings button at the top of the GiftWorks window, then Manage Letter Library on the blue left menu. Then, click the header where it says "View ... Letters" and select Donor Letters.

The available fields (listed under Volunteer Information) include:

Volunteer Screening Date

The date the volunteer was most recently screened.

Volunteer Manager

The volunteer manager of the volunteer.

Volunteer Status

The status of the volunteer.

Most Recent Date of Service

The most recent date on which the volunteer has hours recorded.

Most Recent Recorded Hours

The number of hours most recently recorded for the volunteer.

Most Recent Recorded Job

The job for which the volunteer most recently had hours recorded.

Total Hours Worked

Total hours recorded for the volunteer.

Total Hours Worked This Year

Total hours recorded for the volunteer this calendar year.

Total Hours Worked This Month

Total volunteer hours worked this calendar month.

Recorded Hours Table

A table including the date, job and number of hours recorded for the volunteer.

Job Assignments Table

A table including the date, job, manager and job needs for any jobs to which the volunteer is, or ever was, assigned.

Current Job Assignments Table

A table including the date, job, manager and job needs for any jobs to which the volunteer is currently assigned.

Settings Section

The Settings section of GiftWorks is where you manage the settings for GiftWorks Volunteers. You can manage the lists of volunteer and job managers, projects, skills, and other information about GiftWorks Volunteers.

Modify Projects

Here you add, edit or remove projects from the list of job projects.

Modify Job Managers

Here you add, edit or remove managers from the list of job managers.

Modify Volunteer Managers

Here you add, edit or remove managers from the list of volunteer managers.

Modify Volunteer Skills

Here you choose which of the built-in skills to show or hide and manage the list of customizable skills.

View and Manage License Information

This is where you will enter or update your license information for GiftWorks Volunteers. If you purchase GiftWorks Volunteers, you will be given a license key which you will enter here.

Remove GiftWorks Volunteers Data from Database

Here you completely remove volunteer data from your GiftWorks database. Make sure you use this option with caution.

Volunteer Reports

GiftWorks Volunteers includes several reports, which can be accessed in the Reports section of GiftWorks. See the list of reports by clicking the Reports button at the top of GiftWorks, then clicking View Volunteer Reports.

Volunteers by Volunteer Status

This report shows a list of volunteers. Filter the list by volunteer status using the drop-down list at the bottom of the report window, or click Customize Report in the blue left menu to change other aspects of the report.

Jobs by Job Status

This report shows a list of volunteer jobs. Filter the list by job status using the drop-down list at the bottom of the report window, or click Customize Report in the blue left menu to change other aspects of the report.

Volunteer Growth

This report shows how the number of volunteers in GiftWorks has changed over time. Use the drop-down list at the bottom of the report window to change the date range, or click Customize Report in the blue left menu to change other aspects of the report.

Volunteer Hours History

This report shows how the number of hours recorded for volunteers has changed over time. Use the drop-down list at the bottom of the report window to change the date range, or click Customize Report in the blue left menu to change other aspects of the report.

Top 20 Volunteers by Number of Hours

This report shows the 20 volunteers who have contributed the most hours to your organization. Click Customize Report in the blue left menu to change display options for this report.

Project Hours Report

This report shows the number of hours recorded for each project, and how that number has grown over time. Use the drop-down list at the bottom of the report window to change the date range or filter the report by project, or click Customize Report in the blue left menu to change other aspects of the report.

Job Hours Report

This report shows the number of hours recorded for each job, and how that number has grown over time. Use the drop-down list at the bottom of the report window to change the date range or filter the report by job, or click Customize Report in the blue left menu to change other aspects of the report.

Volunteer Summary

This report shows you a summary of the information for a single volunteer. You will be prompted to select which volunteer's information you would like to see when you select the report.

Job Summary

This report shows you a summary of the information for a single job. You will be prompted to select which job's information you would like to see when you select the report.