

## E-Volunteer | The Basics for Agencies



**United Way of York County**

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## *Important*

If you have a login for e-Pledge to access your payout or campaign information, that login information is separate from your volunteer account due to its access to sensitive information.

## *Additional Help*

If you need further assistance than this guide can provide, contact the United Way of York County Volunteer Coordinator

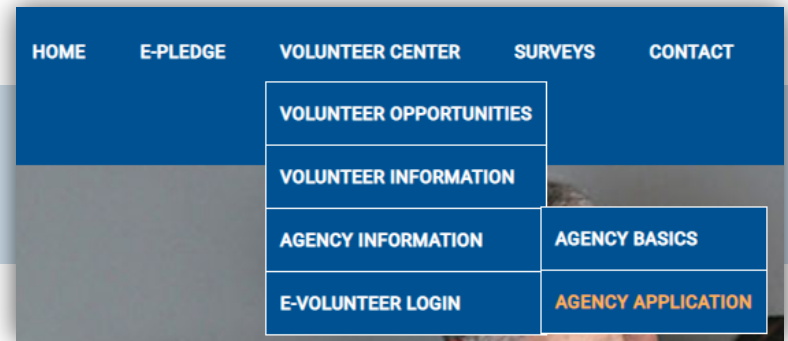
**Bryce Kruger**

[krugerb@unitedway-york.org](mailto:krugerb@unitedway-york.org)

717-771-3809

## Creating an Agency Account

# Creating an Agency Account



## Step 1

[yorkpa.unitedwaypledge.org/Volunteer/VolHome.jsp](http://yorkpa.unitedwaypledge.org/Volunteer/VolHome.jsp)

## Step 2

Click on “Agency Application”

## Step 3

Fill out and submit the agency application

## Note

Please allow a minimum of 24 hours for your application to be processed. Once your agency has been approved, you will receive an email with your account information and a link to your volunteer administrator home page.

A screenshot of the "VOLUNTEER AGENCY APPLICATION" form. The form is titled "VOLUNTEER AGENCY APPLICATION" in a blue header. It contains several sections for data entry: \*Organization Name (text field), \*Applying For (radio button for "Volunteer Management"), Address (text fields for Street Address Line 1 and 2), City, State/Province (dropdown menu showing "Pennsylvania"), Zip/Postal Code, Country (dropdown menu showing "United States of America"), EIN (text field), \*Organization Description (text area), \*Contact Name (text fields for Prefix, \*First, Middle, \*Last, and Suffix), Contact Phone (text fields for Area, Number, and Ext.), \*Contact e-Mail (text field), and Comments (text area). The form is designed with a clean, professional layout using white text on a light gray background.

# Setting up Your Agency Page

## Initial Account Set Up

Once you have received your agency account it is important that you finish setting up your account by entering any necessary information. The three primary sections that require attention are listed below.

- **Agency Information**
- **Agency Description**
- **Agency Contacts**

### *Tip*

If you don't already have these items, now is a great time to create them!

[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)[AGENCY DESCRIPTION](#)[AGENCY CONTACTS](#)

# Account Set Up - Information

## Agency Information

The agency information section includes important details such as your organization's address, contact information, and logo. There is also a section where you can enter alternative names for your organization.

### Important

Your agency address should be your physical mailing address. Also, changing your address here will change your address in our database.

[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)

[AGENCY DESCRIPTION](#)[AGENCY CONTACTS](#)

## ORGANIZATION PROFILE

Bryce's Test Agency - Agency  
112 S Beaver St  
York, Pennsylvania 17401

**\*Name**

**\*Name 1**  
Bryce's Test Agency

**Name 2**

**Main Address / Physical Street Address**

**Address Line 1**  
112 S Beaver St

**Address Line 2**

**City** **State** **Zip Code**  
York Pennsylvania 17401

**Country**  
United States of America

**Business e-Mail**

**Facebook**

**Main Web Address**

**Twitter**

**Business Phone**

**Area** **Number** **Ext**  
0 0 0

\*Items marked with an asterisk (\*) are required

[SAVE](#)  
[CANCEL](#)

**Web Logo**  
[ADD LOGO](#)

**Other Names**

Name Type	Name	Effective	Expiry
Also Known As	BTA	01/14/2020	<a href="#">✕</a>

[ADD NAME](#)

## Account Set Up - Description

## Agency Description

Your agency profile allows you to have three different descriptions associated with your account: *General*, *Mission Statement*, and *Volunteer*. It is recommended that you enter a description for each of these fields.

### Example

**General Description** - Bryce's Test Agency was founded in 2020 because it was a way for him to understand the new database. Now, it's being used to train other nonprofit agencies.

**Mission Statement** – Bryce’s Test Agency aims to connect nonprofits that have volunteer needs to capable and willing volunteers in the community.

**Volunteer** – Our primary volunteer needs consist of finding individuals that are willing to connect nonprofits with volunteer groups of 15 or more.

AGENCY OPPORTUNITIES
AGENCY INFORMATION
EVENT CALENDAR
LOGOFF

AGENCY DESCRIPTION
AGENCY CONTACTS

# ADD DESCRIPTION

## Bryce's Test Agency

Description Type:
Effective:
Expiry:
Description:

General

Mission Statement

Volunteer

ADD

CANCEL

# Account Set Up - Contacts

## Agency Contacts

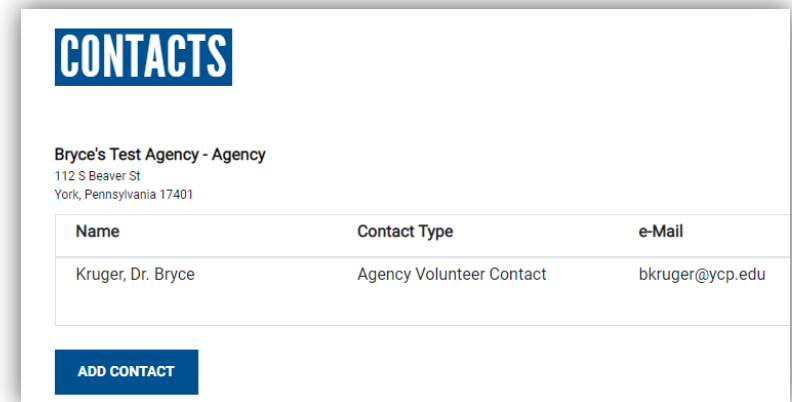
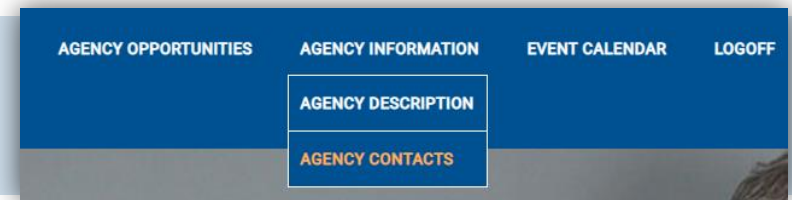
The contacts section of your profile should include the volunteer coordinator/contact of your organization. The contacts that you add here will be linked to the volunteer opportunities that you create later on.

### *Tip*

It is recommended that you have a minimum of two contacts listed for your agency at all times.

### *Pro Tip*

It is not recommended to list your Executive Director as a contact unless they deal directly with coordinating volunteers.





## Adding Volunteer Opportunities

# Adding an Opportunity

## Agency Opportunities

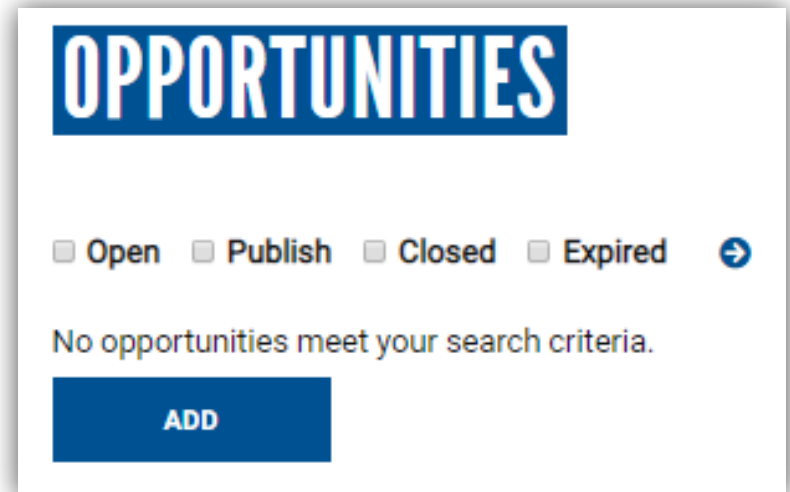
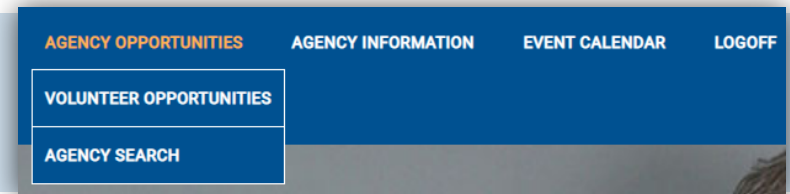
Adding volunteer opportunities to your agency profile is the primary function and use of the e-Volunteer website. You can add and customize opportunities that fit your specific needs as well as track your volunteer responses. The following slides will walk you through the process of creating a volunteer opportunity.

### Tip

1. Be specific and provide as much information as possible in your opportunity descriptions
2. Add time slots to your opportunity if you would like to have different shifts available to volunteers

### Pro Tip

Make sure that you change the status of your opportunity to “Publish”



# Adding an Opportunity - Form

**OPPORTUNITY MAINTENANCE**

Opportunity Title

Description

Contact

General Information

Status

Open

Type

Individuals

Priority

Normal

Start

(MM/DD/YYYY)

01/17/2020

HHMM

End

(MM/DD/YYYY)

HHMM

Minimum Number of Volunteers

1

Maximum Number of Volunteers

☐ Do Not Exceed Maximum Referred/Assigned

Length of Opportunity

Full Time

☐ Allow Sharing

☐ Volunteer can update hours online

Minimum Age

Minimum Age with Supervision

Maximum Age

Receive e-Mail Schedule

As Occurred

Assignment Status

☒ On Bus Line

Assigned

Estimated Hours

☐ Security Check Required

Volunteer Should Provide

Agency Will Provide

Additional Information

☒ Confidential

Address

Street Address Line 1

112 S Beaver St

Street Address Line 2

Street Address Line 3

Street Address Line 4

# Adding an Opportunity - Form

	City	State	Zip Code
	<input type="text" value="York"/>	<input type="text" value="Pennsylvania"/>	<input type="text" value="17401"/>
	Country		
	<input type="text" value="United States of America"/>		
Events	<input type="checkbox"/> Building Future Leaders of York <input type="checkbox"/> United Way Volunteer Center Trainings <input type="checkbox"/> Martin Luther King Jr. Day of Service		
Interests	<input type="checkbox"/> Arts & Culture <input type="checkbox"/> Discrimination <input type="checkbox"/> Financial Stability <input type="checkbox"/> Physical Health <input type="checkbox"/> Basic Needs <input type="checkbox"/> Education <input type="checkbox"/> Homeless/Housing <input type="checkbox"/> Seniors/Aging <input type="checkbox"/> Crime & Safety <input type="checkbox"/> Environment <input type="checkbox"/> Legal Support <input type="checkbox"/> Substance Abuse <input type="checkbox"/> Disabilities/Impairments <input type="checkbox"/> Family Support <input type="checkbox"/> Mental Health <input type="checkbox"/> Veterans		
Locations	<input type="checkbox"/> East York <input type="checkbox"/> South York <input type="checkbox"/> Downtown York <input type="checkbox"/> North York <input type="checkbox"/> West York <input type="checkbox"/> Outside York County		
Neighborhood	<input type="checkbox"/> *Unknown		
Populations	<input type="checkbox"/> Children <input type="checkbox"/> Youth <input type="checkbox"/> Adults <input type="checkbox"/> Seniors		
Clearances	<input type="checkbox"/> Clearances Not Required <input type="checkbox"/> Clearances Required		
Skills	<input type="checkbox"/> Administration <input type="checkbox"/> Companionship/Visiting <input type="checkbox"/> Graphic Design <input type="checkbox"/> Substance Use Prevention <input type="checkbox"/> Advocacy <input type="checkbox"/> Computer Services <input type="checkbox"/> Legal Services <input type="checkbox"/> Tabling <input type="checkbox"/> Animal Care <input type="checkbox"/> Construction/Skilled Labor <input type="checkbox"/> Literacy <input type="checkbox"/> Teaching/Tutoring <input type="checkbox"/> Arts and Crafts <input type="checkbox"/> Disaster Relief <input type="checkbox"/> Marketing <input type="checkbox"/> Victim's Assistance/Services <input type="checkbox"/> Athletic Activities <input type="checkbox"/> Driving <input type="checkbox"/> Mentoring <input type="checkbox"/> Youth/Adult Activities <input type="checkbox"/> Bilingual <input type="checkbox"/> Event Planning <input type="checkbox"/> Music/Instruments <input type="checkbox"/> Child Abuse Welfare <input type="checkbox"/> Food Services <input type="checkbox"/> Parenting/Coaching <input type="checkbox"/> Clerical/Janitorial <input type="checkbox"/> Fundraising <input type="checkbox"/> Reading		

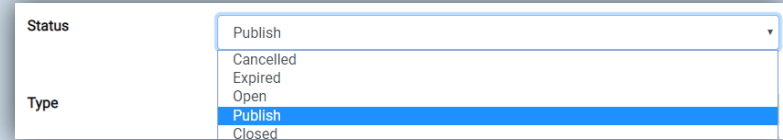
☐ (Volunteers must have all selected skills)

Speaker Topic			
Accommodations	<input type="checkbox"/> Wheel Chair Access		
Time	<input type="checkbox"/> Week Day Afternoons <input type="checkbox"/> Week Day Mornings <input type="checkbox"/> Weekend Evenings <input type="checkbox"/> Week Day Evenings <input type="checkbox"/> Weekend Afternoons <input type="checkbox"/> Weekend Mornings		
Training	<input type="checkbox"/> Training Required <input type="checkbox"/> (Volunteers must have all selected training)		
<input type="button" value="ADD"/>			
<input type="button" value="CANCEL"/>			
<input type="button" value="PRINTER FRIENDLY"/>			

## Final Step

As you can see, the opportunity form is an in-depth process. Once you have entered all of the required information for your opportunity, click “Add” which will take you to the next prompt.

# Opportunity Status



A screenshot of a web form showing a dropdown menu for 'Status'. The menu is open, displaying a list of status options: Publish, Cancelled, Expired, Open, Publish (highlighted), and Closed. The 'Status' label is to the left of the dropdown, and the 'Type' label is below it.

Status	Type
Publish	
Cancelled	
Expired	
Open	
Publish	
Closed	

## Opportunity Status

When you create a new opportunity, it is imperative that you change the opportunity status to “publish” if you want your need to be visible to volunteers. To the right are the opportunity statuses available to you and their function.

### *Important*

When you create an opportunity, its default status will be set to “open”. Be sure to change this to “publish” if you want your opportunity to be visible.

### *Tip*

Whenever you edit an opportunity, the system will return the opportunity status to “open”. If you want your opportunity to remain published, change the status to “publish”.

**Publish** – Makes the opportunity visible to volunteers and visitors to the website. Should always be used if the opportunity is to be viewed.

**Open** – The default status. Allows user to edit opportunity but is not visible to volunteers. Should be used for draft or inactive opportunities.

**Closed** – Deactivates opportunity, disables user from changing status or making future edits. Should be treated as a “delete” button.

**Expired** - Deactivates opportunity, disables user from changing status or making future edits. Should be treated as a “delete” button.

**Cancelled** – Deactivates opportunity and removes it from “agency opportunity” search log. Should only be used to “permanently delete” an opportunity.

# Opportunity Time Slots

## Opportunity Time Slots

Once you have created an opportunity, you will be given the option to add “Time Slots”. This is simply another way of saying shifts, which volunteers can sign up for.

### Example

If your opportunity runs from 12pm – 4pm you may choose to add two shifts for your volunteers to sign up for.

**Shift #1:** 12:00pm – 2:00pm

**Shift #2:** 2:00 pm – 4:00pm

### Tip

You can add shifts to your opportunity at any time, but it is recommended that you do so when initially creating your opportunity.

## UPDATE OPPORTUNITY DATES/TIMES FOR TEST

New Opportunity created.

No Date/Time Slots

ADD

RETURN

## ADD OPPORTUNITY DATES/TIMES

Opportunity	test		
Description	<input type="text"/>		
Start	<input type="text" value="01/16/2020"/>	<input type="text" value="HHMM"/>	<input type="button" value="v"/>
End	<input type="text" value="01/16/2020"/>	<input type="text" value="HHMM"/>	<input type="button" value="v"/>
Minimum # of Volunteers	<input type="text" value="1"/>		
Maximum # of Volunteers	<input type="text" value="0"/>		
Status	<input type="text" value="Open"/>		
Hold	<input type="checkbox"/>		

ADD

CANCEL

# Opportunity List

[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)[VOLUNTEER OPPORTUNITIES](#)[AGENCY SEARCH](#)

## Opportunity List

Once you have created an opportunity, it will be listed under the “Agency Opportunities” section of your profile. Here you can view, edit, and maintain your opportunity as seen below.

### Tip

You can dictate which of your opportunities that you would like to view by selecting the “status checkboxes” listed directly under “Opportunities”.

### Pro Tip

If you have not selected the “Publish” status when creating your opportunity, it will automatically be assigned the “Open Status”

## OPPORTUNITIES

☒ Open ☒ Publish ☐ Closed ☐ Expired [➔](#)

(1-1 of 1)

Opportunity Title	Start	End	Status	# of Max	# of Referred	# of Assigned	# of Completed	# of Outstanding
<a href="#">Bryce's Test Volunteer Opportunity</a>	01/22/2020 12:00 PM	01/22/2020 02:00 PM	Publish	10	0	0	0	10

[📄](#) [🔑](#) [🕒](#) [☰](#) [↺](#) [🔗](#)

# Opportunity Maintenance

## Opportunity Maintenance Items

Maintaining each of your volunteer opportunities is essential to connecting with prospective volunteers as well as developing an active volunteer base. When viewing your agency opportunities, you will see a set of buttons that allow you to alter each opportunity individually. These buttons are listed below.

### *Tip*

You will likely find most use of the copy, Time Slot, and Volunteer List buttons.

### *Pro Tip*

If you have two occurrences of the same opportunity that take place on different dates, use the copy tool to duplicate the opportunity, then change the date occurrence of the copy.



### **Copy**

Used to copy/duplicate an opportunity



### **Private to Account**

Used to make an opportunity private to an individual or organizational account



### **Time Slot**

Used to edit the time slots/shifts that an opportunity has



### **Volunteer List**

A list of the volunteers who have responded to your opportunity



### **View History**

A report that shows how many people have viewed your opportunity over a given time



### **Link**

A link that can be shared as a direct link to your opportunity



# Opportunity Responses



## Opportunity Responses

To view a list of volunteers that have responded to your opportunity, click the “volunteer list” button on the opportunity you are viewing. From here you can see the following:

- Who has responded
- Any shared volunteer contact information

You can also take the following actions:

- Accept/reject volunteer responses
- Email current respondents
- Manually enter a volunteer response

### Tip

You will receive a notification when a volunteer responds to your opportunity. You must accept or reject their response.

**VOLUNTEERS FOR OPPORTUNITY**  
**BRYCE'S TEST VOLUNTEER OPPORTUNITY**

Volunteer Name or Team

Status

Assignment From Date

Assignment To Date

Result: (1-1 of 1)

Volunteers		Start	End Date
1. Kruger, Bryce	Accepted by Agency	01/22/2020 12:00 PM	01/22/2020 01:00 PM
112 S Beaver St. York, PA 17401 krugerb@unitedway-york.org			
Cell Phone(717) 818-3856 Home Phone(717) 846-2031			
Individual Work Phone(717) 843-0957			

# Searching for Volunteer Opportunities

# Opportunity Search

## Opportunity Search

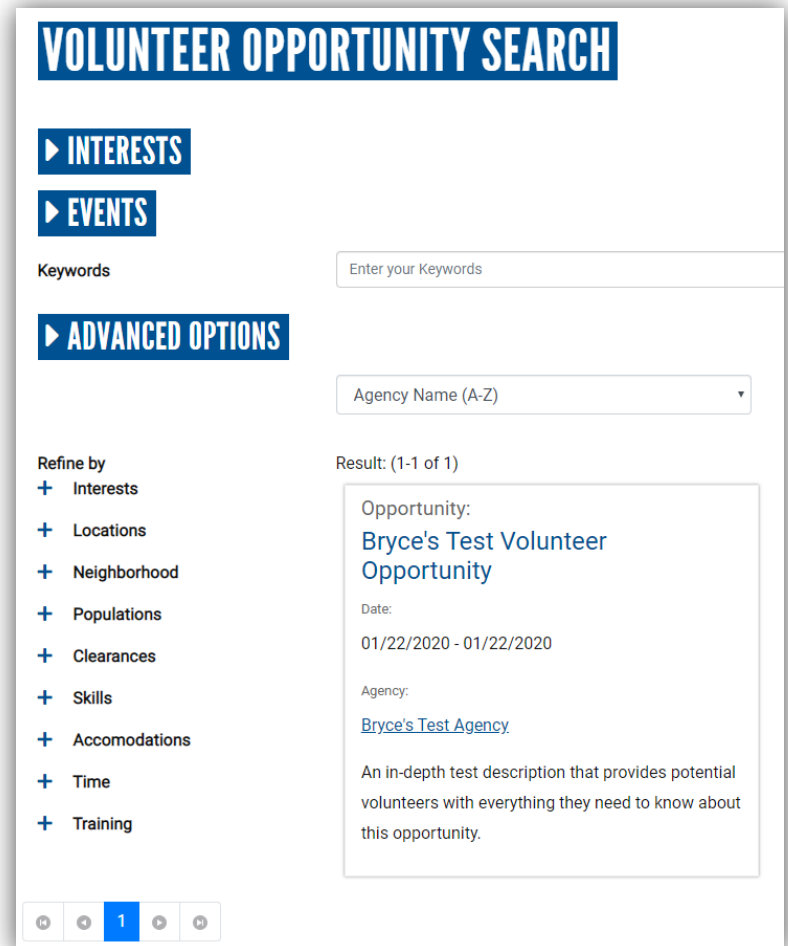
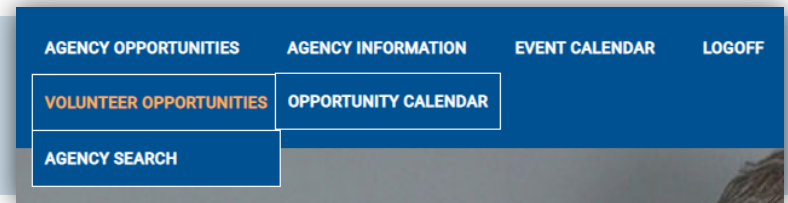
Volunteers can find your opportunities in multiple ways, the primary of which include via the opportunity search, the opportunity calendar, or if they are referred via a direct link. The opportunity search is the primary method by which volunteers can easily find your volunteer opportunity.

### Tip

Provide as much detail as possible in your opportunity description as to inform potential volunteers what is available to them.

### Pro Tip

If your opportunity status is “Open” it will not appear in the opportunity search. The opportunity status must be set to “publish” for this to occur.



# Opportunity Calendar

## Opportunity Calendar

The opportunity calendar is simply a calendar that lists all of the published volunteer opportunities on the website. This is another way for volunteers to view and find your opportunity, and is why it is important to input as much information as possible when creating your opportunity.

### Tip

The opportunity calendar is based off of the occurrence date of your opportunity.

### Pro Tip

The opportunities published on the volunteer website are often directly shared with potential volunteers and interested groups.

The screenshot displays the 'Opportunity Calendar' web application. At the top is a dark blue navigation bar with links for 'AGENCY OPPORTUNITIES', 'AGENCY INFORMATION', 'EVENT CALENDAR', and 'LOGOFF'. Below this, a secondary bar contains 'VOLUNTEER OPPORTUNITIES' and 'AGENCY SEARCH' on the left, and 'OPPORTUNITY CALENDAR' (highlighted in orange) on the right. The main content area is titled 'OPPORTUNITY CALENDAR' in a blue header. It features several filter sections: 'Keywords' and 'Zip Code' with input fields; 'Interests' with a grid of checkboxes for categories like Arts & Culture, Basic Needs, Crime & Safety, Disabilities/Impairments, Discrimination, Education, Environment, Family Support, Financial Stability, Homeless/Housing, Legal Support, Mental Health, Physical Health, Seniors/Aging, Substance Abuse, and Veterans; 'Events' with a list of specific events including '01/20/2020 10:00 AM MLK Day of Service 2020' and '01/23/2020 08:30 AM Volunteer Website Agency Training - In Person'; and radio buttons for 'Available Spaces Only' (selected) and 'All'. There is also a checkbox for 'United Way of York County' and a 'Share' button with a social media icon. At the bottom, a 'Select Date' section shows a calendar for January 2020. The calendar grid has days of the week as column headers and dates as row headers. The date 22 is highlighted, with a tooltip showing 'Bryce's Test Volunteer Opportunity'.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22 Bryce's Test Volunteer Opportunity	23	24	25
26	27	28	29	30	31	

# Agency Search

## Agency Search

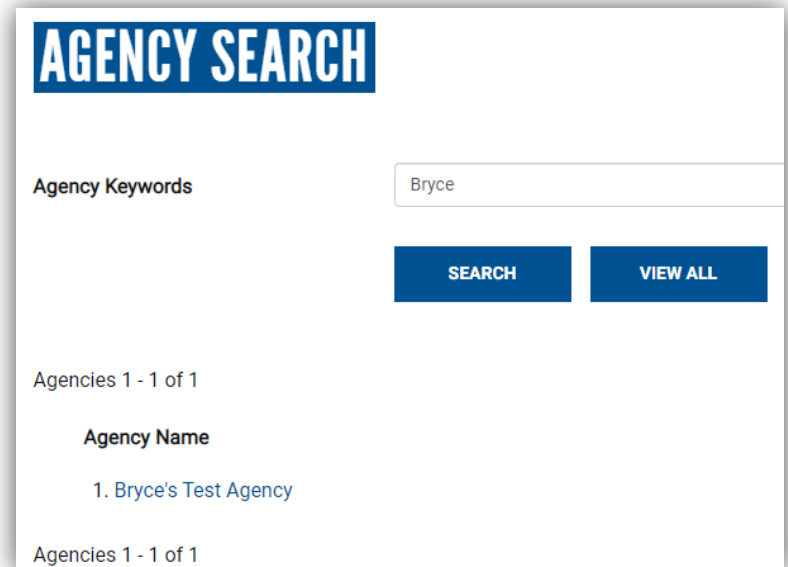
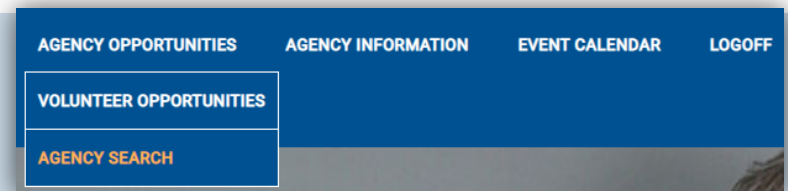
The agency search is similar to the opportunity search in that volunteers can use it to find your organization. Again this stresses the importance of having your agency information completed and up-to-date so that volunteers have access to the most relevant information regarding your organization.

### *Important*

In its current development, the website requires an agency to have a published volunteer opportunity to show up in the agency search.

### *Tip*

It is recommended that your organization has updated descriptions and a published opportunity at all times.



# Community Event Calendar

# Community Event Calendar

[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)[CALENDAR SUBMISSION](#)

## Community Event Calendar

The community event calendar is a calendar in which nonprofits can submit their community and volunteer related events to be published on. If an agency has an event that coincides with a volunteer opportunity, the United Way Volunteer Coordinator can work to link them together if notified.

### *Tip*

It's best to submit your event information a few weeks in advance of the event itself to allow time for approval and exposure.

### *Pro Tip*

The events listed on the volunteer website are often featured in the Volunteer Center's monthly newsletter.

## EVENT CALENDAR

Select Date

February

2020

View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6 United Way Campaign Celebration 2020	7	8
9	10	11	12	13 YWCA V-Day 2020	14	15 YWCA York Paddle Board Yoga Valentine's Day Special
16	17	18 Day of Action Agency Training - In Person	19 Day of Action Agency Training - Webinar	20	21	22
23	24	25	26	27	28	29

# Event Calendar Submission

[AGENCY OPPORTUNITIES](#)[AGENCY INFORMATION](#)[EVENT CALENDAR](#)[LOGOFF](#)[CALENDAR SUBMISSION](#)

## Event Calendar Submission

In order to have your event published on the event calendar, the event submission form needs to be completed and then approved by the United Way Volunteer Coordinator. Please allow a minimum of 24 hours for event submissions to be reviewed and approved.

### *Tip*

Your event submission should provide as much details as possible for potential attendees and volunteers to be adequately informed.

### *Pro Tip*

You do not need to have an agency account to submit an event, but having one allows your event to be linked to your agency page.

## COMMUNITY CALENDAR EVENT SUBMISSION

What is the name of your organization? \*

Event Title \*

Event Description \*

0 of 1000 words

Is your event indoors or outdoors?

- ☐ Indoor  
☐ Outdoor

Insert external links here

Attach external documents here

 No file chosen

Event Photo

 No file chosen

Start Date and Time