

VolunteerSpot Organizer / Room Parent FAQ

REMEMBER TO ALWAYS CLICK **CLOSE AND UNLOCK** WHEN YOU EXIT AN ACTIVITY OPENED THROUGH MyActivities

How Do I Figure Out My Classroom Needs for 2011-2012?

- As in years past, the first step is meeting with your teacher to understand their needs. Use the 2010-2011 classroom spreadsheet as a foundation
- Please take any LS (e.g. walk for fun) or all-school jobs out of your spreadsheet as they will be handled separately by the organizers of the events. The only exception is Spooktacular cupcakes and games staffing

How Do I Get Started Using VolunteerSpot?

- Organizers need to register on VolunteerSpot
 1. Go to www.volunteerspot.com
 2. Click on the register button and fill in the form
 3. Select "Register for Complimentary"
 4. VolunteerSpot will send you an email with a link that you must click to activate your account
- Once you have registered The OES Volunteer Coordinator adds you as an organizer and makes you the "Primary Organizer" for your classroom activities or event

I'm a VolunteerSpot Primary Organizer—What Does That Mean?

- Organizers are responsible for the event or classroom including adding, deleting, and modifying tasks, assigning volunteers manually, creating links for email messages and announcements, and creating reports
- VolunteerSpot designates one organizer as the primary organizer. This person
 - receives all VolunteerSpot automatic notifications
 - is the name that appears on messages sent out by VolunteerSpot including automatic messages
- Organizers are also responsible for monitoring VolunteerSpot for unfilled jobs and recruiting people as needed
- Primary organizers are the only ones that can delete an entire activity. This is done from the MyActivities main screen. **DO NOT DELETE ANYTHING** from the MyActivities screen!

What Do I Do After I Log-in?

- Click on MyActivities in the gold menu bar. This will list all the activities where you are an organizer (both primary and assistant).
- Click on the activity you would like to edit

How Come Some Activities Don't Take Me Right to a Calendar?

- VolunteerSpot has two types of "Activities":
 - **Scheduled** - these jobs (called "spots" in VolunteerSpot) appear in a calendar format and have specific dates/times associated with them (e.g. science volunteer jobs)
 - **Projects/Non-Scheduled** - these jobs appear in a list format and are jobs parents may do on their own schedule (e.g. auction project coordinator)
- Each classroom will have a **Scheduled Jobs** activity and a **Project/Non-Scheduled** activity; most events will have scheduled jobs and some will also have non-scheduled activities for things like committee chairs

- When you login into VolunteerSpot you will see the 2 “template” versions of your classroom activities based on the 2010-2011 Grade Rep’s spreadsheet. Be aware that jobs created in the templates may differ for your classroom

What Activities/Templates Will I Find in VolunteerSpot?

- The VolunteerSpot implementation team has established a template for each classroom and event. These templates are based on the 2010-2011 school year events.
- Where new dates were available the date of an event or activity reflects the information on the main OES calendar
- Where an activity is recurring, only one day has been set-up so changes could be made once and copied to additional occurrences of that activity

How Do I Edit “Scheduled” Volunteer Jobs in VolunteerSpot?

- *Make Edits to Existing Jobs*--make changes to the existing job descriptions or times you require by clicking on the day, select Make Changes and click on the Edit button for the job you would like to modify
- *Add Jobs Not in Template*—To add a job to a day with existing jobs, follow the instructions in *Make Edits to Existing Jobs* then select Add a TO DO task. To add jobs to a new day, click on the day, select Plan this Day, then select Add a TO DO task
- *Use Copy for recurring jobs*—for recurring shifts, click on the day, select Copy. A calendar will pop up, leave “This Activity” in the “Copy to” box and click on the new day in the mini calendar, then select the copy button at bottom of the mini calendar

Important Notes:

- Recurring shifts were only created once in the template to simplify setup for you as days/times often change from year to year
- One downside with the copy feature is that it copies the whole day’s shifts (not just single shifts). It will override anything created on the day you are copying to. In turn, you may sometimes need to manually add a shift rather than use the copy feature for that day
- *Edit Classroom Activity Description*—be sure to edit the description (in Details tab) of all the jobs so parents see the description on the main page. This is important as the calendar view only shows where there is a need, not the specifics of the job on a particular day
 - Click on the green menu tab labeled Details
 - Click on Make Changes
 - Edit the Welcome Message
 - Click Save
- *Deleting*
 - To delete everything on entire day, click on the day and select delete, click yes when asked “Are you sure...”, then click Save
 - To delete a job on a day, click on the day, select Make Changes, then click on the X to the right of the task. If this is the only task on that day, it is the same as deleting the entire day. Click Save and confirm you want to do this, if asked

When you are done making changes be sure and exit the activity by clicking the *Close and Unlock* button in the upper right of the planning screen. If you do not do this, no other organizers may view the activity.

How Do I Edit “Projects/Unscheduled” Volunteer Jobs in VolunteerSpot?

- Edit descriptions of jobs by clicking “Plan Spots”, then select Edit for the TO Do you would like to change
- Add new jobs by selecting Add TO DO task
- To delete a job from a project/non-scheduled activity, click Plan Spots, then click the red X to the right of the job/To Do, then click Save

*When you are done making changes be sure and exit the activity by clicking the **Close and Unlock** button in the upper right of the planning screen. If you do not do this, no other organizers may view the activity.*

How Do I Make Sure I Have Everything Correct in VolunteerSpot?

- You may use the monthly reports to review your information, however it will be listed by date
- If you would rather review the information sorted by job type, you may click “Export” to export the information to Excel and then sort the information
- You may also invite yourself to the Activity so you can see the information from a parent volunteer perspective. After you invite yourself you will see the activities listed in “My Invitations”

How Do I Create a Link for My Emails to Parents?

- Click Create a Link in the left menu of an open activity
- Copy the URL address
- Paste or hyperlink the address into your email message
- Click Close on the VolunteerSpot link message

How Do I Manage Signups in VolunteerSpot?

- *Invite parent using an email with a link or advertise the event in the division newsletter(s)*
 - For classrooms the VolunteerSpot implementation team will provide you with a template email
 - For classrooms the VolunteerSpot implementation team will provide you with a list of your parents’ emails to copy and paste into email program
 - Event organizers can develop email lists from prior years by contacting the previous year’s organizer
 - Parents will also be able to access the links on the classroom pages or the OES Volunteer webpage
- *Parents sign-up for jobs*—by clicking a link and entering their email to access VolunteerSpot—they don’t need to create a login (there are How To Sign Up instructions available on the Volunteer web page)
- *Let parents know about unfilled jobs*—by emailing them a link to the activity and copying and pasting a report from VolunteerSpot. It shows open positions in an easy to read format and is quick and easy to do. To generate a report:
 - Select the Reports icon in the left menu bar
 - Select the report type
 - For a scheduled activity, choose “month” or “day” and select the specific month or specific day from the drop down box
 - For projects/unscheduled activities choose “day”
 - Click view and print
 - Highlight and copy the section of the report you would like to include in your email, hit Ctrl+C (to copy), move to your email and hit Ctrl+V (to paste)
- *Assign parents to jobs as needed*—you may need to re-assign jobs for last minute changes

How Can I Easily See Who Is Signed Up When?

You can generate a report to quickly show all open and filled spots

- Select the Reports icon in the left menu bar
- Select the report type
 - For a scheduled activity, choose “month” or “day” and select the specific month or specific day from the drop down box
 - For projects/unscheduled activities choose “day”
- Click view and print

Can I Create A Report to See All Jobs for All Dates, Open and Filled?

The best way to see this information is to export the data to Excel.

- Select the Export icon in the left menu bar
- If prompted by your browser select Open or Save
 - Open will open Excel and put the information into a spreadsheet
 - Save will save the file to your hard drive. The file name will be the name of the activity followed by .csv (you will need to determine where on your hard drive the browser saves the file)
 - Open Excel
 - Do a File/Open, move to the folder where the file was saved
 - Make sure “All Files” is selected for the file types
 - Select the saved .csv file and open
- Once in Excel you can use the Data/Filter functionality to quickly locate specific information
 - Highlight the column headings in the open file
 - Select the Data menu, then select Filter, this will place arrows to right of each column label
 - Click the down arrow in the column of interest and select what you would like to see, for example selecting “(Blanks)” in the who column will show all open spots

How Do I Manually Assign Volunteers to a job?

- Go into your activity through MyActivities and click on the specific day where you want to assign a volunteer
- Select Make Changes
- Select Assignments in the task you wish to assign
- Click on the drop down box that says Click Here to Add a Volunteer
- If their name appears on the drop down list click on it, if it doesn't, select New Volunteer
- Enter their name and email address. Their name will be used by VolunteerSpot in the salutation of VolunteerSpot generated message and the email will be used to notify them they have been assigned and to send them a reminder.
- Click Save
- Click Save again
- Click Save again
- Click Close and Unlock to exit the activity

How Do I Remind Parents About their Jobs?

- For “scheduled” activities, the system automatically sends a confirmation when the parent signs up and a reminder two days prior to the job

- For “projects/unscheduled” activities, the system sends a confirmation but does not send reminders as these jobs aren’t associated with dates. However, you can easily send parents a reminder by copying and pasting a report (choosing “day”) from VolunteerSpot

What Happens When Parents Delete Their Job (Spot)?

- VolunteerSpot will let you know when a parent deletes a spot that is within 2-days of the task
- We recommend telling parents to find a replacement if they delete a spot within a 4-week window. Deletions outside the 4-week window will appear in your needs as you monitor VolunteerSpot on a monthly basis. (This process proposal needs approval by Grade Representatives)

Does VolunteerSpot Automatically Track Hours?

- Yes! But only completely accurately for the scheduled jobs. For the project-based jobs we will estimate how many hours each job will take
- Bottom line: most parents will no longer need to log hours. Organizers and folks working on projects will still need to keep track of their time

What is the difference between MyActivities and MyInvitations?

- *MyActivities* are those activities for which you are an organizer. You may make changes to those activities. You must select an activity in MyActivities to change it.
- *MyInvitations* are those activities that you have been invited to sign up for. This is the view that the volunteer will see. You may invite yourself to activities you organize. This allows you to see what your volunteers see. You may also have other activities that you have been invited to and signed up for. VolunteerSpot may be used by anybody. If another organization is using VolunteerSpot and has invited you to sign up , these will appear in your MyInvitations as well. OES activities are always prefaced with OES

Can I set up my own activity?

No. You may, however, contact oesvolunteer@oes.edu and request an activity be set up. This email is OES’s premium/paid account. Once set-up you will be made a primary organizer and oesvolunteer@oes.edu will be an assistant. This will assure that we have premium functionality on all events and have the access we need to support organizers and collect hours automatically.

Will This Be Easier Next Year?

Yes! The work you’re doing will become a living record of what jobs were needed this year. The 2011/12 VolunteerSpot data will become next year’s template for each classroom. Thanks for your support during our implementation year!

REMEMBER TO ALWAYS CLICK CLOSE AND UNLOCK WHEN YOU EXIT AN ACTIVITY OPENED THROUGH MyActivities