Day of Caring Projects Instruction Guide

Before submitting projects, you need to create your personal account at volunteer.tauw.org and notify Lexi at lbollis@tauw.org. Follow these steps to create your account:

1. Visit volunteer.tauw.org
2. Click "Log In" in the upper right corner
3. Click "Register" in the bottom left corner of the pop-up box
4. Fill out the information to register for a volunteer account

After you create your account, notify Lexi so she can correctly label your account. That will give you Partner Staff access and the ability to create volunteer opportunities.

When you log in to volunteer.tauw.org as a Partner Staff, you will be taken to organization's Sharing Portal.

If you have not completed the demographic information for your profile, that is the page you will see upon logging in. You may either fill out the information and save, or click "Return to Managing Opportunities" in the top right corner to go to the Sharing Portal.

This is the dashboard that will allow you to manage your volunteer opportunities, confirm volunteer hours, and pull reports to gather data on your volunteer engagement.

To view your volunteer opportunities and add new ones, click on "Volunteer Opportunities" on the left menu.

If this is your first time logging in, you will see that there is already one opportunity called "Self-Reported Volunteer Hours." This is automatically added for all nonprofits and allows volunteers to log hours they have volunteered with your agency without signing up through TAUW's volunteer site.

To create a new opportunity, click "Create Volunteer Opportunity" in the upper right-hand corner.

Here, you will add your Opportunity Name and Description of the project. You will also specify how volunteers will register.

<u>Schedule Type:</u> Choose between "Date & Time Specific" and "Individually Scheduled."

With a date & time specific opportunity, you will provide a set time at which you need volunteers to show up for the project. *For Day of Caring projects, please select Date & Time Specific.*

Registration Type: Options change depending on which schedule type you choose.

Date & Time Specific: Choose between "Sign Up" and "Express Interest."

With sign up, volunteers will select a volunteer shift to register for. You will then confirm their signup to commit them to attending at that time. *For Day of Caring projects, please select Express Interest.*

Under the Description field, you'll find the "Default Opportunity Coordinator" field. The more Opportunity Coordinator contacts you have for your agency, the more options you will have on this list. The Opportunity Coordinator should be the person who volunteers will be in contact with for that project.

If you have an image that represents the project well, please upload it here. The image will appear on the site to help attract volunteers. If you don't include an image, TAUW may contact you requesting one or add one of our stock photos for you.

You will also add the location of the project here. When you click on the Location field, a box will pop up.

If you already have projects in the system, you will see list of locations for those opportunities here. If your agency has multiple locations, please be sure to select the one where this particular project will take place.

To add a new location, click "Add a location" in the top right corner of the box.

Under the Image field, you will have more options to provide information about your project. Select a Primary Impact Area, Population Served, Age Groups Served, and Volunteer Activity Type. Also specify how old volunteers need to be. This information will help folks know if your opportunity fits well with their interests.

Some fields may have a default option selected, so be sure to click the drop-down menu to double check that what is selected is correct.

Check the "Suitable for Groups" box for all Day of Caring projects.

<u>Minimum & Maximum Attendance:</u> Specify the minimum and maximum number of volunteers you need for this project. I will rely on this information to make good volunteer group matches. If you need a specific number of volunteers, enter the min & max as the same number.

The next two fields on this page allow you to customize when registration will open and close for your opportunity.

"Registration cutoff" allows you to specify how many hours before the start of your opportunity registration will close. ***For the 2022 Fall Day of Caring, you do not need to set a cutoff.***

"Registration start date" will specify when the opportunity will go live on TAUW's volunteer site. When you click that field, a calendar will appear, allowing you to select the date. The default is

the date you are creating the project. **For the 2022 Fall Day of Caring, please select July 1 as the registration start date**

The next question asks if this volunteer opportunity is for the Fall Day of Caring. When you select "Yes," additional questions will appear below.

Project Details

Type of Work *

○ Indoor Technical/Skilled (i.e.: carpentry, computer programming, website updates).

○ Indoor Light Physical (light cleaning, no ladder needed for painting or window washing).

○ Indoor Heavy Physical (construction, heavy lifting, tall ladder needed for painting).

○ Indoor without Client Interaction (filing, typing, entry level data entry, mailings).

● Indoor with Client Interaction (reading to children, manicures, party with senior citizens).

○ Outdoor Technical/Skilled (carpentry, building a wheel chair ramp or gazebo).

○ Outdoor Light Physical (yard work, cleanup, no ladder needed for painting or windows, car detail).

○ Outdoor Heavy Physical (heavy lifting, painting or window wash with a tall ladder).

○ Outdoor with Client Interaction (fishing, trip to zoo or park, picnic, golfing).

○ Outdoor without Client Interaction (picking up litter).

Supplies *

● The agency will provide all supplies needed to complete the project

○ The company must provide the following supplies to complete the project

"Type of work" allows you to provide more detail of the scope of the project. You can specify if it's indoors or outdoors, what level of physical intensity, and if volunteers will be interacting with clients.

"Supplies" will tell the volunteer group if your agency will provide all needed supplies or if their organization will need to provide supplies. If your agency will supply everything, select the first option. If volunteers need to bring anything with them, select the second option.

If you indicate that the company will need to provide supplies, four additional questions will appear.

Supplies *
- ○ The agency will provide all supplies needed to complete the project
- ● The company must provide the following supplies to complete the project

Volunteers will likely be able to bring the following items: *

[ ]

List items the volunteers are likely to have here. (Tools like hammers, shovels, or saws, safety equipment, etc.)

The company will most likely need to purchase the following items: *

[ ]

List items the company will likely have to supply here. (Materials such as lumber, concrete, or nails, machinery/large tools like jackhammers, concrete mixer, or backhoes)

Estimated Cost of Project *

[Select One ▾]

Does the agency have tax exemption that the company could use to purchase these supplies? *

[Select One ▾]

Volunteers will likely be able to bring the following items: List any supplies that volunteers are likely to have on hand, and therefore won't need to purchase. Examples include gardening tools, trash bags, paper towels, and safety equipment.

The company will likely need to purchase items: List all supplies that will need to be purchased for the project. This includes building materials, heavy machinery, and other items that volunteers are not likely to already own.

Estimated cost of project: Indicate the price range for the supplies the company will need to purchase for the project.

Tax exemption: Indicate if your agency has tax exemption status that the company will be able to use when purchasing the supplies.

Continue scrolling for the rest of the Project Details questions.

Lunch Information *

[Select One ▾]

Liability Insurance *

[Select One ▾]

Comments or Special Requests

[ ]

[Next]

Lunch Information: If your agency will supply lunch for the volunteer group, answer "Yes." If the company will need to purchase lunch for their volunteers, select "No."

Liability Insurance: Indicate if your agency has liability insurance that will cover volunteers.

Comments or Special Requests: This field allows you to include any other details that don't fit elsewhere in the form. This can include COVID-19 safety protocols, a company matching request, or other information.

When you have filled out all fields on this page, click "Next" in the bottom right corner.

If you are adding a new location for this opportunity, you will be taken to the "Create Location" page. If you selected a location that was already available, you will skip this page.

You will be taken to the Create Volunteer Opportunity – Date & Time Specific page. Here you will create occurrences for the opportunity. Day of Caring projects will not occur on a regular schedule, so select no for that question.

Then, you will specify the date and time for the project. **For the Fall Day of Caring, select the date Friday, September 16.** Then, specify the time that you want the project to occur on that date.

When you have added all occurrences for the opportunity, you will click the "Create" button in the bottom right corner.

You will then be directed to a summary screen for the volunteer opportunity. This allows you to review the information you provided. You can make edits to the project information by clicking "Edit."

Note: You can only edit some information after you have created a project. If you need to change the location, for example, you will need to contact Lexi.

After you create your volunteer opportunity, Lexi will receive a notification. She will then review the opportunity information and either approval the opportunity, thereby publishing it on the public site, or reach out to you with questions or requests for edits.

Volunteer Signup Process

When volunteers sign up for your opportunity, you will receive an email notification. Please wait to act until Lexi has reviewed the signup and approved it.

You will know the volunteers have been approved when they appear as "Confirmed" in your account.

Your main point of contact will be identified as the Volunteer Captain.