

# Volunteer Management

## Overview

Convert current systems from various applications and manual users over to Salesforce Volunteer Management for everything from volunteer signup to volunteer management.

Current resources:

<https://womensmoneymatters.org/volunteer-opportunities/> (Wordpress)

<https://womensmoneymatters.org/volunteer-application/> (FA)

<https://www.signupgenius.com/go/8050e4da9a82ba6ff2-budget#/>

(Signup Genius - COACH)

- some Zoom, some in-person)
- Available opportunities (various dates)
- Location (20 slots usually)

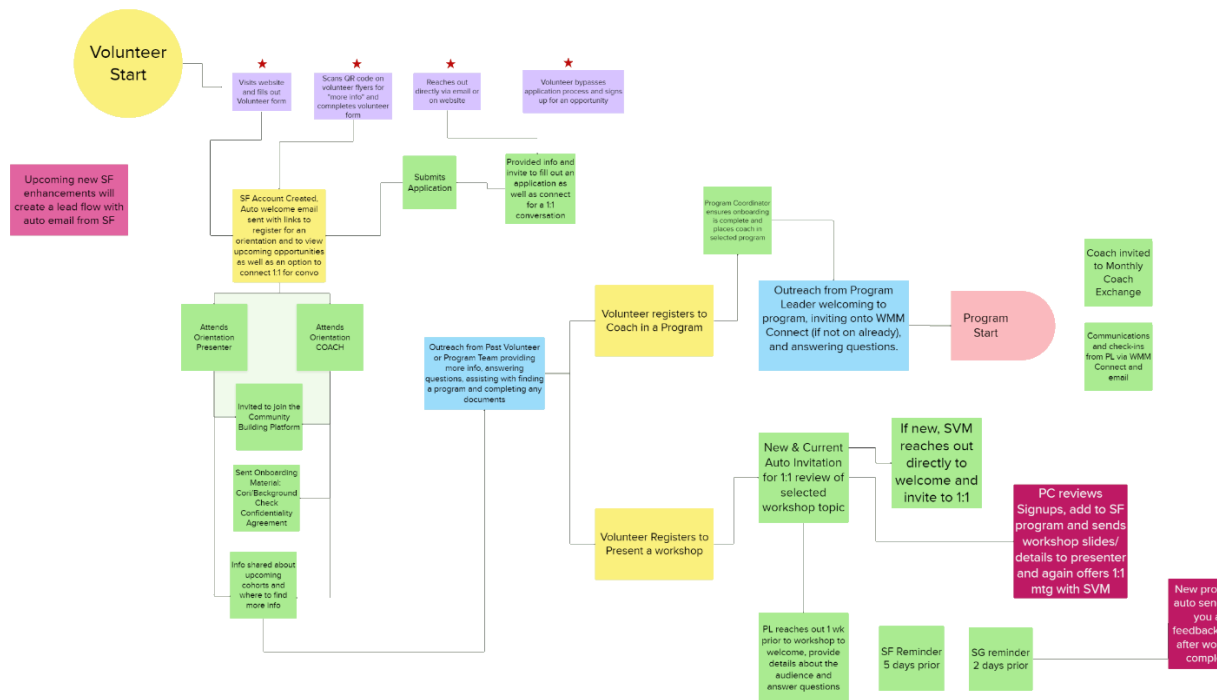
<https://www.signupgenius.com/go/8050e4da9a82ba6ff2-financial#/>

(Signup Genius - PRESENTER)

- Available slot (name of program)
- Date (various dates)
- Location (some Zoom, some in-person)
- Available opportunities (1 slot usually)

Journey can be seen here:

<https://app.mural.co/t/budgetbuddies1383/m/budgetbuddies1383/1691416086900/8aaa0e21c06aa0e9dbbeaedde7af23804b079620?sender=01c063de-511e-47b4-bf41-29a64838abe4>



## Volunteer Application (Phase 1 - Getting started)

1. Visits website / Scans QR Code / reaches out via email:  
<https://womensmoney matters.org/volunteer-application/>
2. Fills out FA form (application)
3. SF Account Created,
  - a. Auto welcome email sent with links to register for an orientation and to view upcoming opportunities as well as an option to connect 1:1 for convo
4. Attends Orientation - Presenter OR Attends Orientation - Coach
5. Invited to join the Community Building Platform
6. Sent Onboarding Material:
  - a. Cori/Background Check
  - b. Confidentiality Agreement
7. Info shared about upcoming cohorts and where to find more info

**Outreach from Past Volunteer or Program Team providing more info, answering questions, assisting with finding a program and completing any documents**

**Volunteer registers to Coach in a Program**

1. Volunteer registers to Coach in a Program
2. Program Coordinator ensures onboarding is complete and places coach in selected program
3. Outreach from Program Leader welcoming to program, inviting onto WMM Connect (if not on already), and answering questions.
4. Program Start

*\*Coach invited to Monthly Coach Exchange*

*\*Communications and check-ins from PL via WMM Connect and email*

### **Volunteer Registers to Present a workshop**

1. New & Current Auto Invitation for 1:1 review of selected workshop topic
  - a. PC reviews Signups, add to SF program and sends workshop slides/details to presenter and again offers 1:1 mtg with SVM
  - b. If new, SVM reaches out directly to welcome and invite to 1:1
  - c. PL reaches out 1 wk prior to workshop to welcome, provide details about the audience and answer questions

*\*SF Reminder 5 days prior*

*\*SG reminder 2 days prior*

*\*New process to auto send thank you and feedback survey after workshop completion*

## Goals

1. Install Volunteers for Salesforce:  
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003JBggEAG>
2. Move everything into Salesforce and away from manual users and SignUp Genius
3. Setup Calendar from the website where volunteers can sign up from different calendar platforms (google calendar, outlook, etc.,) and will also show programs, workshops, date and time, etc., just like how SignUp Genius is setup
4. On the calendar, set up all sorts of filters (programs, volunteer opportunities, etc.,)
5. Create automations: 1 program and 1 zoom link. Workshops created will share the zoom link and automatically fills in the calendar invite.
6. Use leads to better track conversion rates and where users stand in the application process.
  - a. Starts as lead
    - i. Application received
    - ii. Attended Orientation (Presenter)
    - iii. Attended Orientation (Coach)
  - b. Invited to join the Community Building Platform
  - c. Sent Onboarding Material:
    - i. Cori/Background Check
    - ii. Confidentiality Agreement
  - d. Info shared about upcoming cohorts and where to find more info
  - e. Convert leads to Contact
7. Use volunteer Management to track hours volunteered (connect to volunteering opportunities)
8. Use Volunteer Management to have folks sign up to volunteer as needed.

## Milestones/Tasks

### Get Volunteer for Salesforce installed in the org

- ☒ Get the application installed in the org in the correct location and settings.

### Setup the application

### Build the lead object (what fields move here and what stays in contact)

- ☐ Create fields in object that will live there
- ☐ Remove fields from contact that should be there (or keep everything)
- ☐ Which automated emails to be sent and when?

### Edit Formassembly forms to feed into the new leads object

### Follow Volunteer Manager rule

Once program is created:

- ☒ WMM manually Adds : Program Leader and Tech Contact
- ☒ Manually Creates Zoom Link
- ☐ 20 Coaching opportunities auto created to be signed up (possibly more)
- ☐ 2 Presenters per Workshop
- ☐ 1 Observer
- ☐ And once a program coach signed up, they can no longer sign up to be a presenter or observer unless they sign up for a totally different program
- ☐