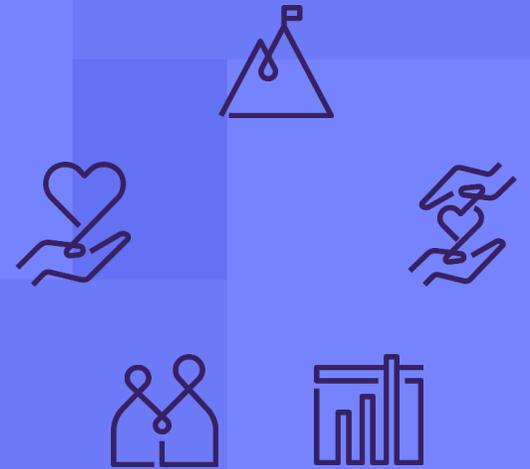


DONOR ENGAGEMENT

Managing Volunteers



Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction



Agenda

1. Volunteer Management Dashboard
2. Recruiting and Tracking Activity
3. Events, Phone Banks, and Distributed Canvasses
4. Q&A



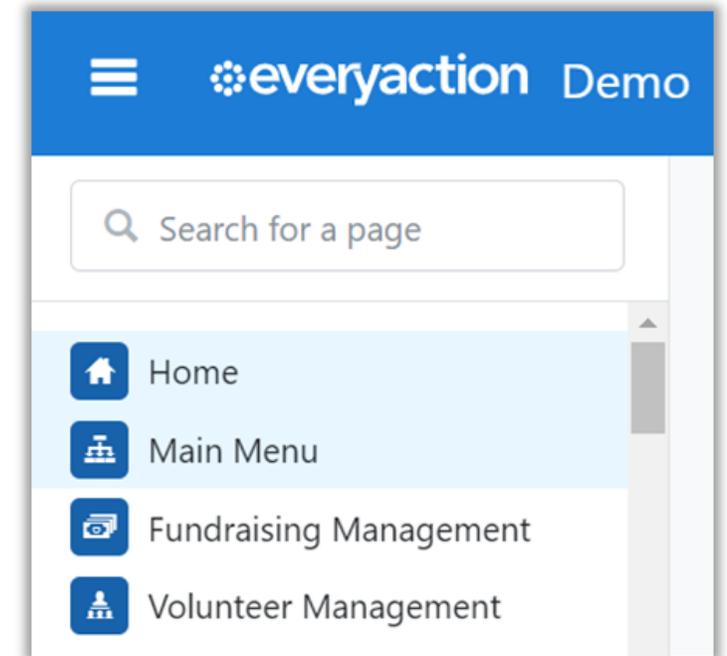
Volunteer Management Dashboard Overview

Volunteer Management Overview

The **Volunteer Management** dashboard gives organizers a quick overview of all the information they need and easy access to their most common tasks.

Before We Begin:

- If the dashboard is not already set as your default **Home Page**, you can open it from the sidebar menu. You can set the dashboard as your **Home Page** by selecting it from the dropdown menu under your name on the right-hand corner and choosing **Manage Profile > Home Settings > Landing Page**.



Viewing the Dashboard

At the top of the **Volunteer Management** landing page, you'll see quick links to your files and folders as well as a link to **Quick Lookup**.



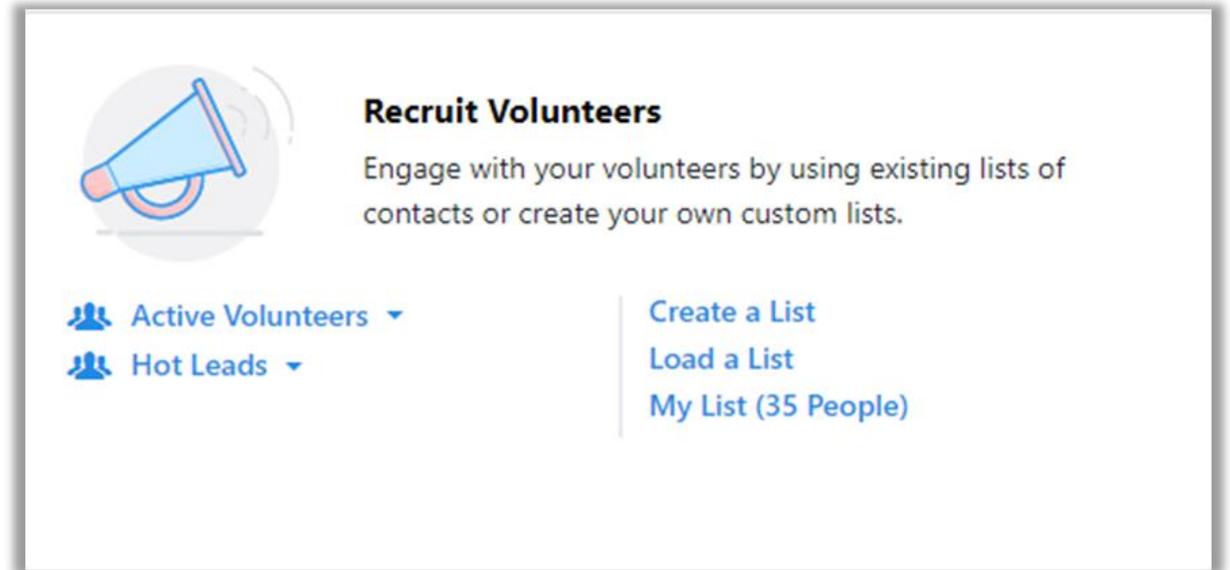
- You will also see a link to **Volunteer Management Settings** which allows you to customize which searches and reports you will see on the dashboard.
- What else you see on this dashboard depends on the **User Profile** assigned to your account. Since every user will see slightly different options depending on their user profile and individual preferences, the following are descriptions of cards and links you might see with a typical setup.

Recruit Volunteers

Recruit Volunteers

This card contains quick links to commonly used tasks when recruiting volunteers or contacting voters.

On the right-hand side of this card, you will see links to **Create a List**, **Load a List**, or **My List**.

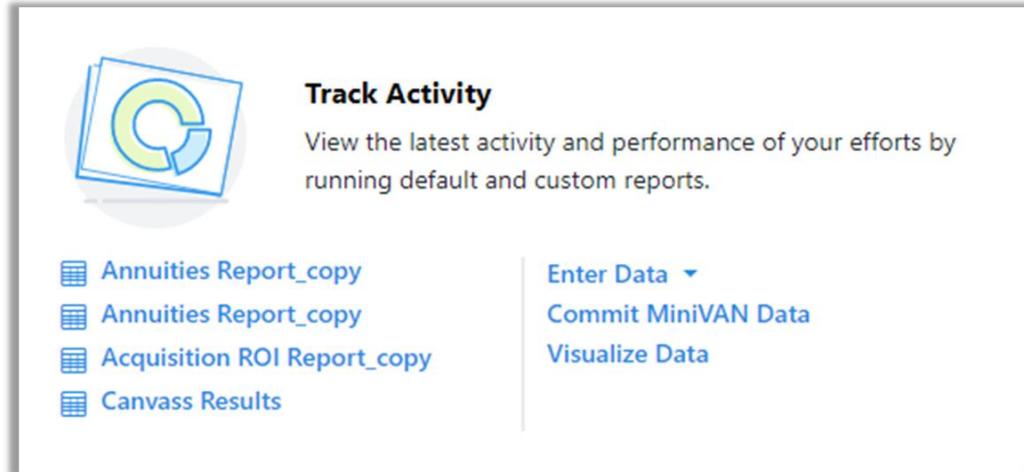


On the left, you will see links to some pre-selected searches you can choose to create a new list, create a new phone bank or add to an event. These include:

- **Active Volunteers** are contacts who have completed at least one shift in the last 30 days.
- **Hot Leads** are contacts added in the last 7 days but who have not signed up for an even shift in the last 30 days.
- **Lapsed Volunteers** is a list of previously active volunteers who have not completed a shift in the last 30 days.

Track Activity, Events, and Phone Banks

Track Activity and Recent Contacts

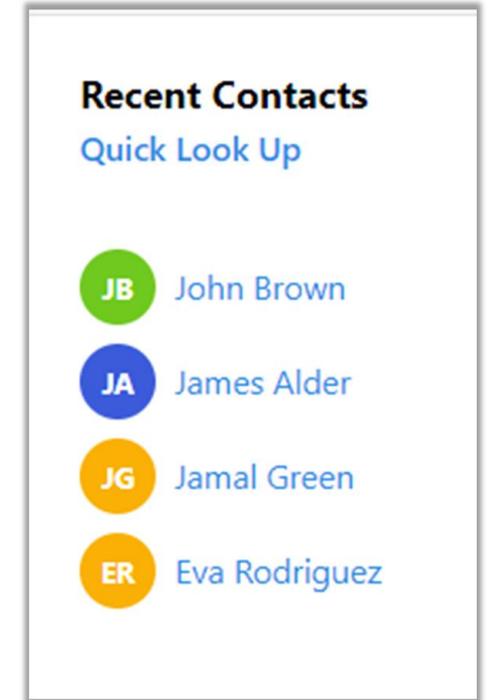


Track Activity
View the latest activity and performance of your efforts by running default and custom reports.

- ☰ Annuities Report_copy
- ☰ Annuities Report_copy
- ☰ Acquisition ROI Report_copy
- ☰ Canvass Results

Enter Data ▾
Commit MiniVAN Data
Visualize Data

Recent Contacts is a list of the last 20 contact records you accessed so you can quickly return to the records you were recently viewing.



Recent Contacts
Quick Look Up

- JB John Brown
- JA James Alder
- JG Jamal Green
- ER Eva Rodriguez

Track Activity gives you easy access to your reports. There are a few defaults offered here as a suggestion, but you can switch these out and add up to 5 reports of your choice using the **Settings** link from the top of the page.

You'll also see links in the section to manage your data. Your choices include a dropdown menu linking to different types of data entry, an option to **Commit MiniVAN** data, or a link to **Visualize Data** that takes you to the **Analytics Dashboards**.

Events

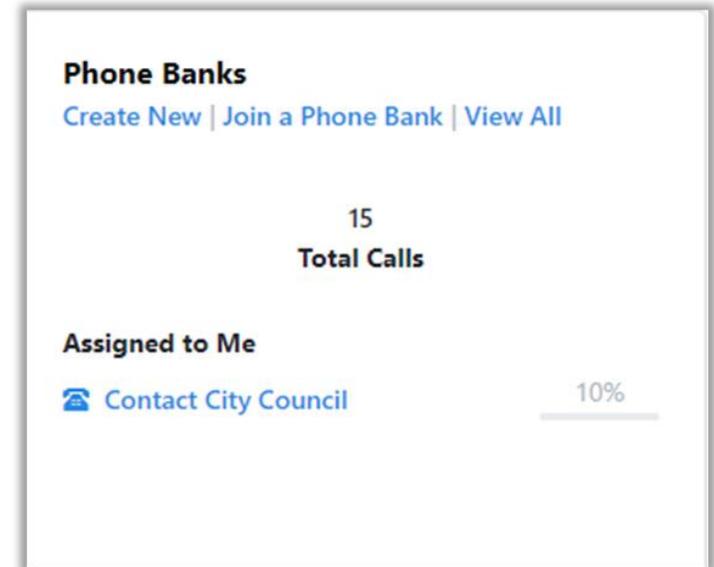
Events gives you an overview of your followed or auto-followed event activity. An event will only display if the start date was within in the past 7 days or will start up to 7 days in the future.

Past	Today	Upcoming
	 June Phone Bank 2:00 PM - 8:00 PM	14 Schedul... 12 Confirm... 0 Completed
	 Neighborhood A 4:00 PM - 8:00 PM	10 Schedul... 7 Confirmed 0 Completed

- Events are grouped by **Today**, **Upcoming**, and **Past**. You can see up to 5 events in each of these sections. If you have more than 5 events, you will see the 5 most recently followed.
- Events are auto-followed if you create them or schedule volunteers. You can also manually choose to follow events using the button at the top of the event details page.
- Event sign-ups scheduled via **Bulk Upload** or by **API** users will **not** be auto-followed.

Phone Banks

You'll see links at the top to create a new phone bank, join a phone bank, or see a list of all active phone banks assigned to you.



You'll also see a summary of calls you've made in the last 30 days via a **Virtual Phone Bank**.

- **Total Calls** are the total call attempts.
- **Contact Rate** is the number of successfully canvassed voters or volunteers divided by the total calls made.
- **Number of Days Since Last Call** is the number of days since a Virtual Phone Bank call was made.

You will also see a list of up to five of your assigned phone banks with the most recent end date appearing at the top. From here you can click through to your phone bank to start making calls. The progress bar displays total call attempts by all callers for that phone bank.

Q&A

Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Help Center Resources

- [Overview: Volunteer Management dashboard](#)
- [Video: EveryAction Volunteer Management Enhancements Feature Workshop](#)
- [Module 5: Community Organizing and Volunteer Management](#)



Additional Training

- Bonterra Academy:

<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>

- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

