



Alumni Volunteer University Partner Training Reference Guide

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INTRODUCTION

The purpose of this document is to provide university partners with pertinent information on how to manage their volunteer opportunities and their prospective volunteers through Alumni Volunteer provided by the Alumni Association of the University of Michigan (Alumni Association). It assumes that the reader belongs to a school, college, campus, or unit associated with the University of Michigan that has agreed to a partnership with the Alumni Association, has been given access to the Alumni Volunteer platform, and has participated in/viewed a high level onboarding orientation. If you are not a current partner or do not have access to the system please reach out to alumni.volunteer@umich.edu for more information on how to get engaged.

This document is not meant to give step by step instructions on how to perform actions, but it is meant to provide links to product documentation and U-M specific recommendations on how to utilize this system. The Alumni Association's product partner HandsOn Connect has extensive documentation that they maintain for their volunteer management product. **Please note that all screenshots may look a little different as each customer is able to add some branding to the product the information provided is consistent for our platform.** We have intentionally linked documentation as opposed to inputting the information directly for ease of access and to ensure that the information remains up to date with HandsOn Connect's best practices.

DEFINITIONS

- **Opportunity Types**
- Private Opportunities (Invitation Codes)
 - Invitation codes can be associated with an opportunity in order to make an opportunity 'private'. Private opportunities only show up if you enter the invitation code on the search page. Refer to "Creating Invitation Only Opportunities" below for more information. Please note that although this functionality is available, and important for some university partners, it is our recommendation to have opportunities visible to all alumni volunteers whenever possible, to ensure a robust offering for our volunteers.

CREATING AN OPPORTUNITY

When you've been given access as a partner within the community, you'll be able to navigate to "Manage Opportunities" from the top right menu. From there you can access your opportunities and create new opportunities by selecting "Volunteer Opportunities" from the left menu. Below are links to instructions on creating different types of opportunities.

CREATING A NEW OPPORTUNITY



CREATING “VIRTUAL” OPPORTUNITIES

In order to create opportunities that can be done from any location without any “in person” interaction please select the location as “Virtual” when setting up your opportunity. A virtual opportunity is defined as one with all name fields noted as “Virtual” and the postal code noted as 00000.

CREATING “NATIONWIDE” OPPORTUNITIES

In order to create opportunities that can be done from a variety of locations that will be determined based on a matching or as needed basis with “in person” needs, please select the opportunity type as “**Individually Scheduled**”, registration type “**Express Interest Only**”, and leave the location **blank**.

CREATING ONGOING OPPORTUNITIES

In order to create opportunities that are long term and do not include specific dates/times such as board members, leader positions, please select **Individually Scheduled Opportunity - Express Interest Only** as the schedule type and registration type respectfully.

CREATING INVITATION ONLY OPPORTUNITIES

When creating invitation only opportunities, select your organization for the field “Requires Invitation From”. In parentheses you will see your organization invitation code. This must be provided to your contacts that you’re inviting so they can enter it on the search page under “Invitation Code”. Please note that you will only have one invitation code per organization so all invitation type opportunities will be viewable by anyone with the code.

If you do not see your organization in the “Requires Invitation From” or there has been a security issue and you need to change your invitation code, please contact alumni.volunteer@umich.edu for support.

NAVIGATING AN OPPORTUNITY

Below are links on how to access existing opportunities and where key details can be accessed for editing information on your opportunity.

[ACCESSING EXISTING VOLUNTEER OPPORTUNITIES](#)

[VOLUNTEER OPPORTUNITY DETAIL PAGE](#)

SYSTEM EMAIL NOTIFICATIONS

The following email notifications are sent from the system

- To Volunteers
 - Waitlisted opportunity now open
 - Connection Cancellation Notice
 - Connection Notice of Occurrence Reschedule
 - Opportunity Sign-up Confirmation
 - Volunteer Status has been confirmed
 - Teams - Invitation to join team
 - Teams - Notify Captain Volunteer has joined
 - Opportunity Posted
 - Opportunity Reminder
- To Staff/Coordinators
 - Opportunity Expiration Notice
 - Reminder to report attendance and service hours
 - Notification of volunteer signups for Grouped Occ
 - Notification of volunteer in wait list
 - Request to Verify Hours
 - Occurrence is Now Live
 - Volunteer Interest/Signup Notification
 - Notification of volunteer removals

REPORTING

The Alumni Association will distribute periodic engagement and trend reports. However, there are two forms of reporting available within the portal for partners as well as listed below.

Special report requests can be made to the Alumni Association by contacting alumni.volunteer@umich.edu

ADDING A CONNECTION

You may also manually add a connection (i.e. volunteer) that has previously connected with you on the system following the below instructions.

ADMINISTRATIVELY ADDING CONNECTIONS

If you would like to add a connection that has never registered with you previously on the portal before please reach out to the Alumni Association by contacting alumni.volunteer@umich.edu



REPORTING ATTENDANCE

Following your event, or during your event if you have access to the internet and a device, partners should report attendance at their event to ensure accurate engagement tracking.

QUICK AND EASY REPORTING OF VOLUNTEER ATTENDANCE

REPORT ON REGISTERED VOLUNTEERS

You can also generate a pdf report of contact information for everyone that has registered (i.e. expressed interest or signed-up for a specific occurrence). You can find this by clicking the down arrow next to the occurrence on the given opportunity and generate the standard report.

At this time, this report is not available in any format other than a pdf. Special reports can be requested as well.

CONCLUSION

In conclusion, the above documentation references include terminology and basic functionality within the portal. It is important to note that the Salesforce end user interface is new to the product provider, HandsOn Connect, and that there might be some features in the documentation that are not currently available in the Salesforce. Additionally, the layouts may look slightly different, but the main purpose should be consistent with the Alumni Association experience.

For any questions or concerns please reach out to alumni.volunteer@umich.edu and we greatly appreciate your partnership!