



ShoreCAN

Volunteer Center

How To Guide for Creating and Managing Volunteer Groups

Volunteer Center Instructions

Below is a guide to share with your organizations for creating groups of volunteers using the Volunteer Groups function. Be sure to customize and verify all steps distributing this guide (either via email or hard copy). It is best to personalize it by adding your logo, special instructions and contact information.

How To Guide for Creating and Managing Volunteer Groups

Easy to Use instructions for creating groups of volunteers, using 1-800-Volunteer.org. You can communicate with groups and assign groups to opportunities.

Logging in to your organization account

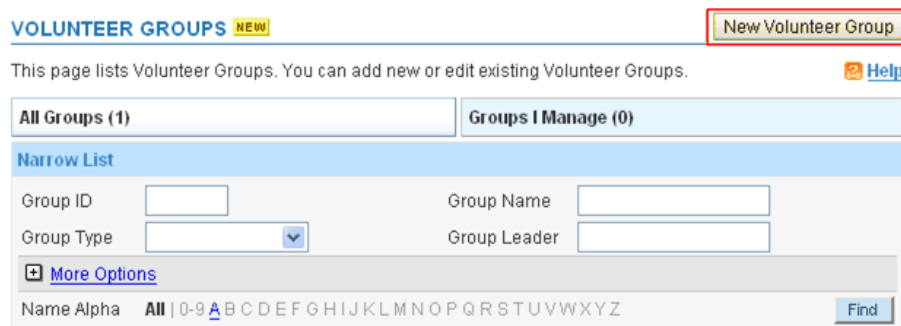
1. Go to www.shorecan.org and click on the 1-800-Volunteer Logo. Click the **Login** link in the upper right hand corner of the screen.
2. Enter the **Username** and **Password** you created or provided to you by the Volunteer Center.
3. Click **Login** at the bottom of the form. Continue with steps below.

Creating a volunteer group

1. Click on **Volunteer Groups** in the left navigation column.




2. Click on the **New Volunteer Group** button on the top right hand corner of the screen and the Create Volunteer Group screen will display.



- To create your group, you will complete information in 2 forms, marked by tabs at the top of the Create Volunteer Group screen: **Group Description** and **Group Members**. The red asterisk * next to a field name indicates that the field is required and must be completed before the form can be saved.

Group Information | Group Members | Record of Service

Group Leader  [Help](#)

Group Leader: Steven Smith [Change](#)

E-mail: stevensmith@yahoo.com


Phone: 617-858-7978


Group Leader will volunteer with the group.

Backup Group Leader Include on all communications sent to the Group

First Name *

Last Name *

E-mail  E-mail or Phone is required.

Phone  Enter phone number in format xxx-xxx-xxxx.

Group Leader

Each group must contain a group leader who is the point of contact for the group members to ensure a successful experience and to coordinate between the group and the organizations. A group leader can:

- Add/Edit group members
- Signup groups to an opportunity
- Communicate with other group members
- Include volunteers with and without 1-800-Volunteer.org accounts
- Manage group's volunteer schedule
- Enter records of service / hours served for the group

NOTE: If you, as the organization, create the group you become the leader by default, but you can also assign another individual volunteer to be the group leader. Enter either the e-mail address or the phone number for the backup group leader.

- Next, add the group name, type and any additional information in the Description section. These are all required fields. Group types are: Company, Organization, Academic, Family/Friends and Other.
- Enter the location of the group. This is only to give the organization a general idea of where the group is located and does not restrict where the group can volunteer.

Description - Tell us about the group

Group Name *

Type *

Notes *

 Enter any information you would like organizations to know about your group.

- Complete the **Type of Service, Social Issues, Skills, and Availability**. These fields are *optional*, but will help you match the group to opportunities appropriate for the group's skills and interests.
- Click the button at the bottom of the screen when you are done and you will be taken to the **Group Members** page.

Adding volunteers to a volunteer group

- Organizations can add existing volunteers within I-800-Volunteer.org to the group by using the **Add Existing Volunteer to Group** or enter new group members using the **Quick Add Member**.
- Add Existing Volunteer to Group** will allow you to find a list of volunteers in your I-800 database and add them to this group. Click on the **Add Existing Volunteer to Group** button to find a list of volunteers and then click the icon after the zip code field to add one or more existing volunteers to the group.

 Quick Add Member

First Name * Last Name * Age *

Phone E-mail Receive E-mails

- Quick Add Volunteer** allows a volunteer **without** an account in I-800-Volunteer.org to be added. The only required fields are First Name, Last Name, and Age. It is important, however, to enter a phone number or email where possible to ensure that the volunteer group member can be contacted.
- Click **Create Group** to finish creating the group.

E-mail members about the creation of this Group

NOTE: The group is not saved, including the information you entered on the first screen until you click Create Group. Exiting without clicking Create Group will result in the loss of your group data.



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What Happens Next?

The group leader will now be able to assign the group to opportunities via the referral process, and communicate with the group via automatic emails. If the **E-mail members about the creation of this Group** box was checked at the bottom of the **Group Members** page, an e-mail will be sent automatically to group members informing them that the group was formed.

Questions?

Please contact Jon Fitzsimmons at the ShoreCAN Volunteer Center with questions or for assistance.
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