

How To Guide for Volunteer Skills Matching

Volunteer Center Instructions

Below is a guide for your organizations to learn how to effectively use the Volunteer Skills Matching features in 1-800-Volunteer.org to find volunteers. 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.

NOTE: In order for organizations to be able to use this feature, *they must be given access by the Volunteer Center by checking Allow Access to Skills Matching* in the organization's profile as shown below. To change this setting, follow the steps below.

1. Login to your Volunteer Center administration area.
2. Click on the organizations link on the left hand navigation area.



3. Select the organization that you wish to give access to skills matching by finding the organization and clicking the **Edit** icon.

Note: You may also give access to skills matching to more than one organization at a time by checking the box next to the organizations and then clicking the **Change Skills Matching**.

For Administrative Use Only	
Registration Date	03/09/2005
Inactive Date	n/a
Status *	Active <input type="button" value="v"/>
Status Notes	<input type="text"/>
Volunteer Center Notes	<input type="text"/>
	<input type="checkbox"/> Auto-accept opportunities and activities posted by this organization
	<input checked="" type="checkbox"/> Allow access to Volunteer Matching ?
	<input checked="" type="checkbox"/> Notify Organization that access to this feature has been modified

4. Check the **Allow access to Volunteer Matching**. You can also notify the organization that this feature has now been enabled for them.
5. Click **Save and Return to List** to save the changes.



How to Guide for Volunteer Skills Matching

Easy to Use instructions for using volunteer skills matching on our volunteer recruiting and management website, powered by 1-800-Volunteer.org. This service will allow you to find volunteers that match the skills you list in your opportunities, and invite them to participate via email.

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. To access your profile and make any changes, 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.

Selecting an opportunity for skills matching

1. Click on the **Opportunities** link in the left side navigation column to display a list of your volunteer opportunities.
2. Find the opportunity for which you need volunteers by clicking on the **Volunteer Matches Icon** below the opportunity. You will be taken to the **Volunteer Matches** screen.

Referrals: 13 Sign-up Sheets: 11 Entries: 8 Pnd: 8 Cnf: 0 Dcl: 0



NOTE: In order for the Skills Matching icon to appear and Skills Matching to work, your opportunity must contain specific skill requirements located in the Details Tab of the opportunity when you create or edit. If the opportunity does NOT contain skills, the Skills Match Icon will not be highlighted. To add skills to an existing opportunity, go back to "Opportunities", select the opportunity by clicking on it, click on **Edit**, click **Continue to Details**, add the skills and click **Save and Return to List**.

3. The first time that you run a **Volunteer Skills Match** for an opportunity you will be on the **Matching Setup** page. If you have already run a match, you will automatically be directed to the **Volunteer Matches** page instead. You can navigate between these pages by clicking on their tabs at the top of the screen. To set up a volunteer match and indicate your needs, you should be on the **Matching Setup** page.

Setting Up and Matching Volunteers to Your Opportunity:

1. Select whether to add '**weighting**' to any of the skills by clicking on the appropriate button in the **Matching Preferences** section. Weighting a skill makes it more important; volunteers with those skills will appear at the top of the matched list and will receive a higher match percentage/rank.

Matching Setup Volunteer Matches


Matching Preferences

Matching Method [?](#) Weighted Matching Unweighted Matching

- Under the **Skills and Interests Priorities** section there are **Skills Experience** and **Weights Keys** for your reference. To select skills, skill levels, and weighting (optional) for a specific skill category, click the **+** sign in the box next to the appropriate category. The skills for this category will be displayed.
- Using the **Skills Experience Key** as a guide, select the required skill level ranging from “Interest” to “Expert/Certified” by clicking on the checkboxes next to the skills as shown in the examples below.

<input type="checkbox"/> Construction/Home Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carpentry  	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Electrician	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- If you selected **Weighted Matching** under **Matching Preferences**, three circles of increasing size, corresponding to level of importance, will appear next to the skill. Click on the circles to indicate the weighting of this skill using the **Weights Ranking Key** as your guide.

<input type="checkbox"/> Construction/Home Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carpentry  	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electrician	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- You may optionally also indicate the **Days and Times** that you need volunteers.

NOTE: The more restrictive you are, the more refined your results will be. This may mean less volunteers returned in your search. Volunteers may be more flexible than their profile indicates.

Volunteer Availability								
Days & Times	<input checked="" type="checkbox"/> Volunteers must be available							
	One of these				Time Slots			
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
Morning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
Afternoon	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	All
Evening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
	All	All	All	All	All	All	All	

- Option** - You can further refine **Location Preferences** by **checking the box** next to the words “Of those” and selecting **residing** mileage limits (**within X miles of**) in the drop down box, as shown below. The zip code is *automatically* populated based on information in the opportunity. Please note that by checking the box and selecting mileage limits (**within X miles of**) where volunteers **reside**, the number of matches received may be reduced.



Location Match Volunteers willing to volunteer in Zip Code

Of those, only when they reside Zip Code

7. Select your **Notification** preferences to let you know when volunteers accept (automatic) or decline your invitations. Turning off decline notifications may reduce the number of emails you receive.

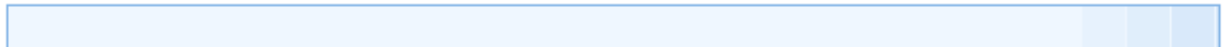
Notifications

Notify Organization when Volunteers accept invitations

Notify me when Volunteers decline invitations

8. Click on the [Save and Show Matches](#) button at the bottom of the screen and I-800-Volunteer.org will automatically find available volunteers with the necessary skills. The **scrolling bar** (example below) on the screen indicates that the search is in progress. You may continue to work on other screens while this search is in progress. Depending on how broad or narrow your matching criteria, it may take several minutes.

Finding matches. [Cancel](#)



9. Once the search is complete, a **list of volunteer names and/or volunteer id numbers** appears on the screen, along with a percentage skills match under the **rank field**. You can sort the list by clicking on the underlined column headings. You may view the list as below (**Brief**) or click on **Detailed** to see the volunteer's skills and notes they may have added.

NOTE: Some Volunteer ID's appear instead of names to protect the privacy of the volunteer. Their name will display once they have accepted your invitation OR if they are already active in your database of volunteer profiles. An **envelope icon** will display before the name or id for volunteers who have already been sent invitations.

Display: Detailed | Brief

Showing 41 of 41. Results per page: [10](#) [25](#) [50](#) [100](#) [250](#)

<input type="checkbox"/>	<u>Volunteer</u>	<u>Rank</u>	<u>Location</u>	<u>Last Active Date</u>	<u>Invite Date</u>
<input type="checkbox"/>	ID: 401588	100%	20735, MD	11/14/2006	
<input type="checkbox"/>	ID: 280744	100%	20735, MD	07/18/2006	
<input type="checkbox"/>	ID: 273867	100%	20602, MD	02/15/2006	
<input type="checkbox"/>	Kelly Valente	100%	20005, DC	05/16/2007	04/27/2007

Indicates invite was sent
 Indicates invite was accepted
 Indicates invite was declined

- Select any volunteers that you would like to send an invitation to by clicking the checkbox next to their identification numbers. You may also select **All** volunteers on this list or filter the list and then select **All**.


NOTE: Volunteers can choose whether or not to receive automatic email invitations when they set-up their Volunteer Profiles. If they chose NOT to receive email invitations from you, they will view their invitations by logging in to their accounts and clicking on **Invitations** in the left navigation column.

- Click [Send Invitation](#) at the bottom of the list and an e-mail form will appear.
- You may send the default email or personalize the email text and then click [Send Invitations](#). If you wish to change back to the default at any time, press the **Reset to Default** button.












Viewing Opportunities with Volunteer Matches

- To view a list of opportunities for which volunteer matches have been made, click on **Volunteer Matches** in the left navigation column on your home page. Click on column headings to re-sort the data.



- To see a detailed list of volunteers that were matched for a particular opportunity, the status of your invitation (sent, accepted or declined) and the matching criteria that you used, click on the **View Matches Icon**  to the right of the opportunity listing.

Showing 1 to 10 of 45. [1](#) [2](#) [3](#) [4](#) [5](#) Results per page: [10](#) [25](#) [50](#) [100](#) [250](#)

 Title	 Organization	 Last Run	 Matches	
 Inauguration Airport Greeter	Tallahassee Area Convention and Visitors Bureau	12/28/2006	131	
 Family Volunteer Day at Apalachee Ridge Community	VolunteerLEON Youth Corps	11/14/2006	112	
 BabyTime Program Assistant: Youth Services	Leon County Main Library	11/13/2006	71	

- The default view (**Brief**) will be displayed. Select **Detailed** if you would like to view the volunteer's skills profile, availability and notes.
- Follow the steps above to invite volunteers.



ShoreCAN

Volunteer Center

What Happens Next?

Every volunteer whose profile is set up to accept emails and you have selected to receive an invitation, will get a copy of your automated e-mail. A blind copy (bcc) will also be sent to you. The email gives the volunteer the option to **accept or decline** to participate in your opportunity. You are notified if the volunteer accepts or declines based on your selections under **Notifications**. To see a complete list of volunteers and the status of your invitations, follow the steps in the preceding section **Viewing Opportunities with Volunteer Matches**.

Volunteers may also check and respond to their invitations by logging in and clicking **Invitations** in the left navigation column. If the volunteer accepts, they will follow the normal process for a referral by completing the Express Interest form and then appearing as a referral under the particular opportunity that they were invited for.

Questions?

Please contact Jon Fitzsimmons at the ShoreCAN Volunteer Center with questions or for assistance. ShoreCAN Volunteer Center, 1324 Belmont Avenue, Suite 401, Salisbury, MD 21804

www.shorecan.org

shorecan@cfes.org