DONOR ENGAGEMENT

Volunteering In EveryAction

Bonterra™

Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction

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Agenda

1. Organizing your Volunteers
   1. Why Volunteer IDs are Important
2. Volunteering Actions
   1. Events
   2. Phone Banking
3. The Volunteer Management Dashboard
4. Engagement Points

Creating Your Volunteers

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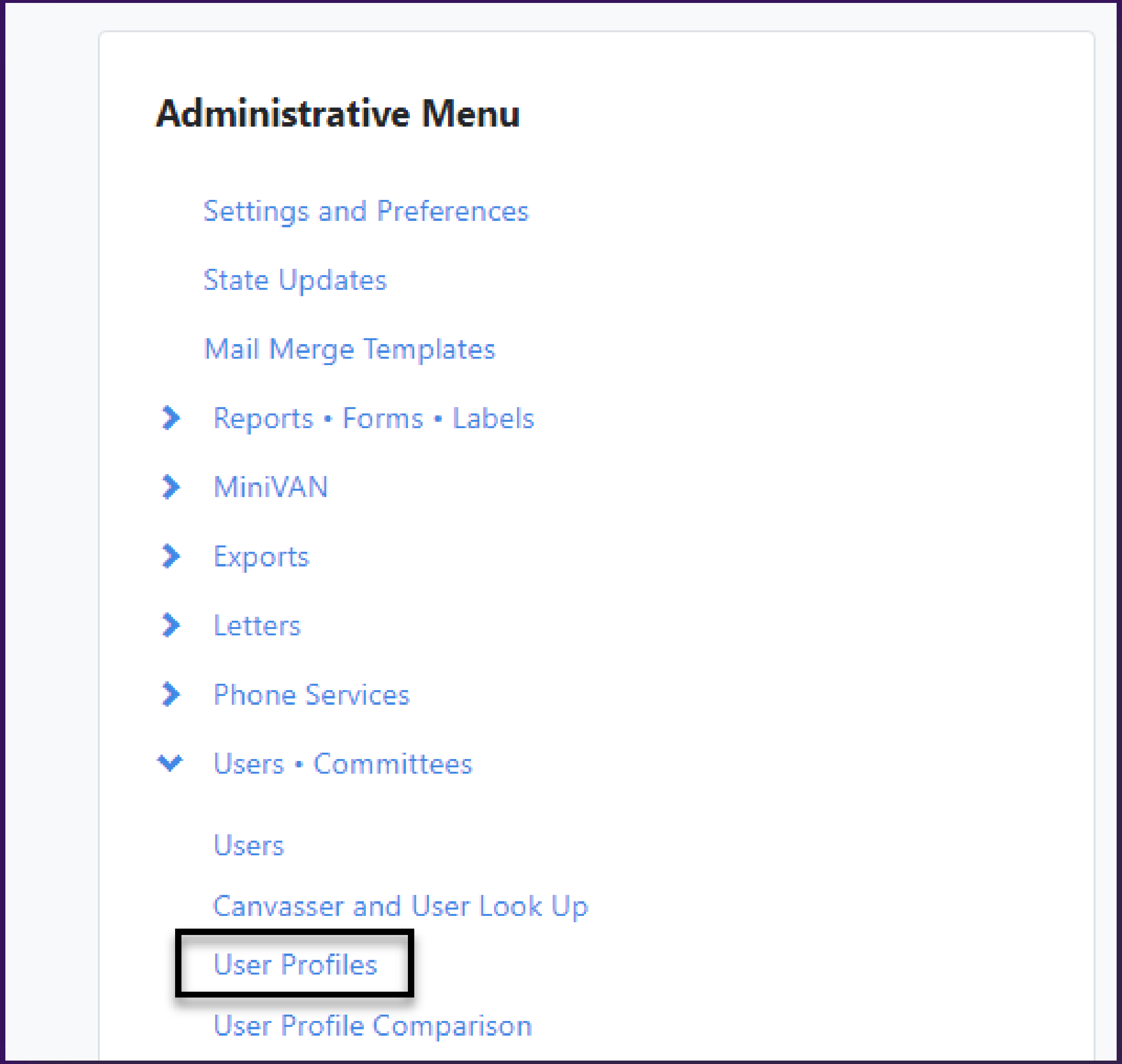
Understanding the ActionID

Some organizations can create and edit their own **User Profiles (roles)** and will be able to define customized permission sets that will allow staff the right amount of access while limiting the changes they can make.

In this case, you will see the option **"User Profiles"** listed under your **Administrative Menu** or from the **Sidebar.**

For more information on **User Profiles in EveryAction,** please see our help documentation listed in the reference section of this webinar.



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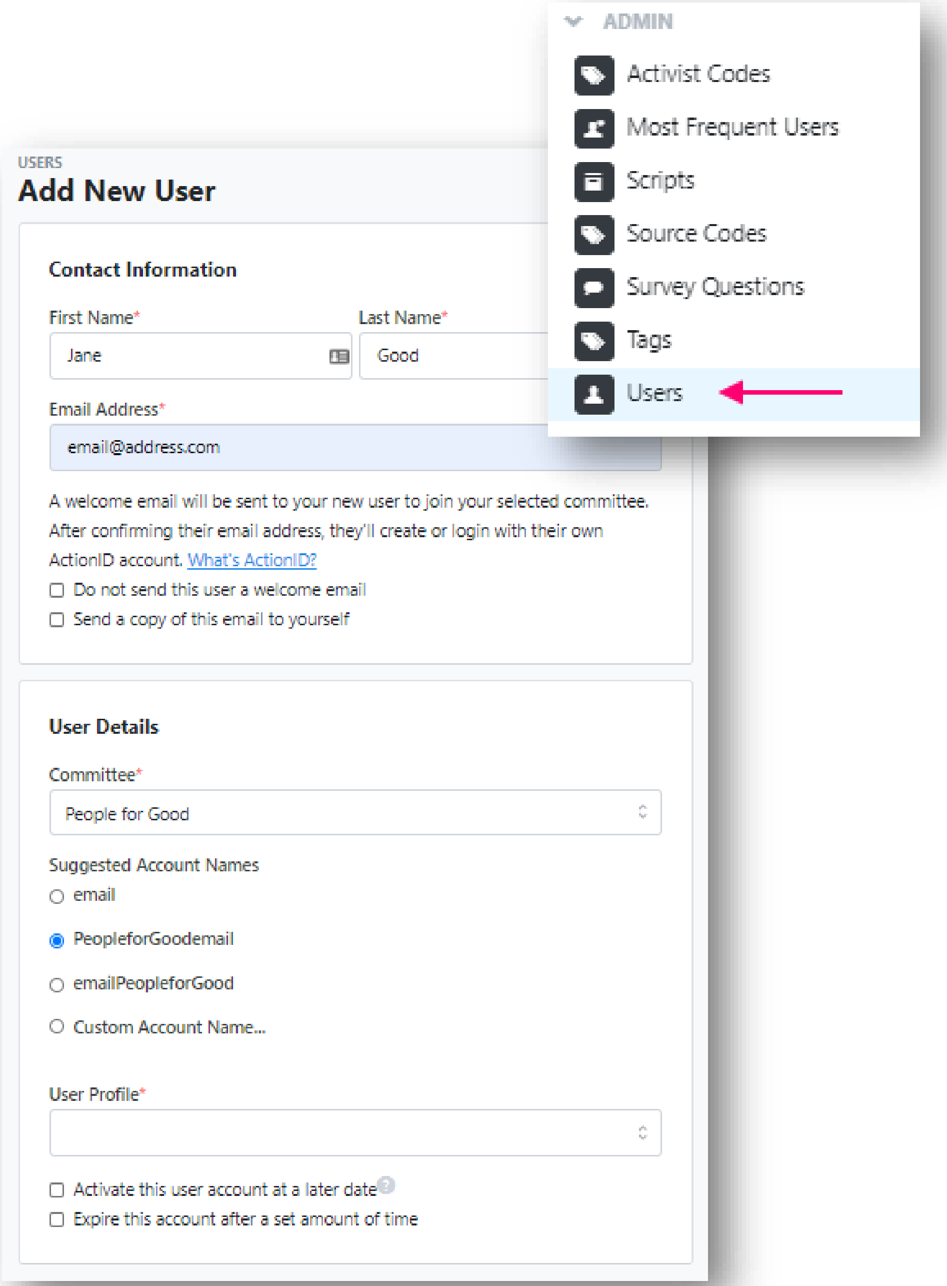
Understanding Users and Roles

In EveryAction, each User is assigned a User Profile, which determines their access to features and types of data. User Profiles represent a certain level of access and are named based on the packages.

- Admin level User Profiles have access to all offered features in the packages their Committee has purchased and can create other Users.
- Manager level User Profiles have access to all offered features in the packages their Committee has purchased but CAN NOT create other Users.
- Staff level User Profiles are intended for low-to-mid level department-specific staff, and typically do not need access to some Committee specific tools.
- Intern level User Profiles perform basic tasks like looking up contact records, viewing Events, and create lists and searches.

Creating a User Account

- To create a new User, start by opening the Users list page by searching for Users in the Sidebar or Main Menu > Users * Committees > Users.
- Select **Add New User** and enter the **Contact Information** and **Committee** for your new user.
- Select an Account Name and then select a User Profile or User Role. If necessary, set an expiration date. The Assign Access option will also appear for state-based databases.



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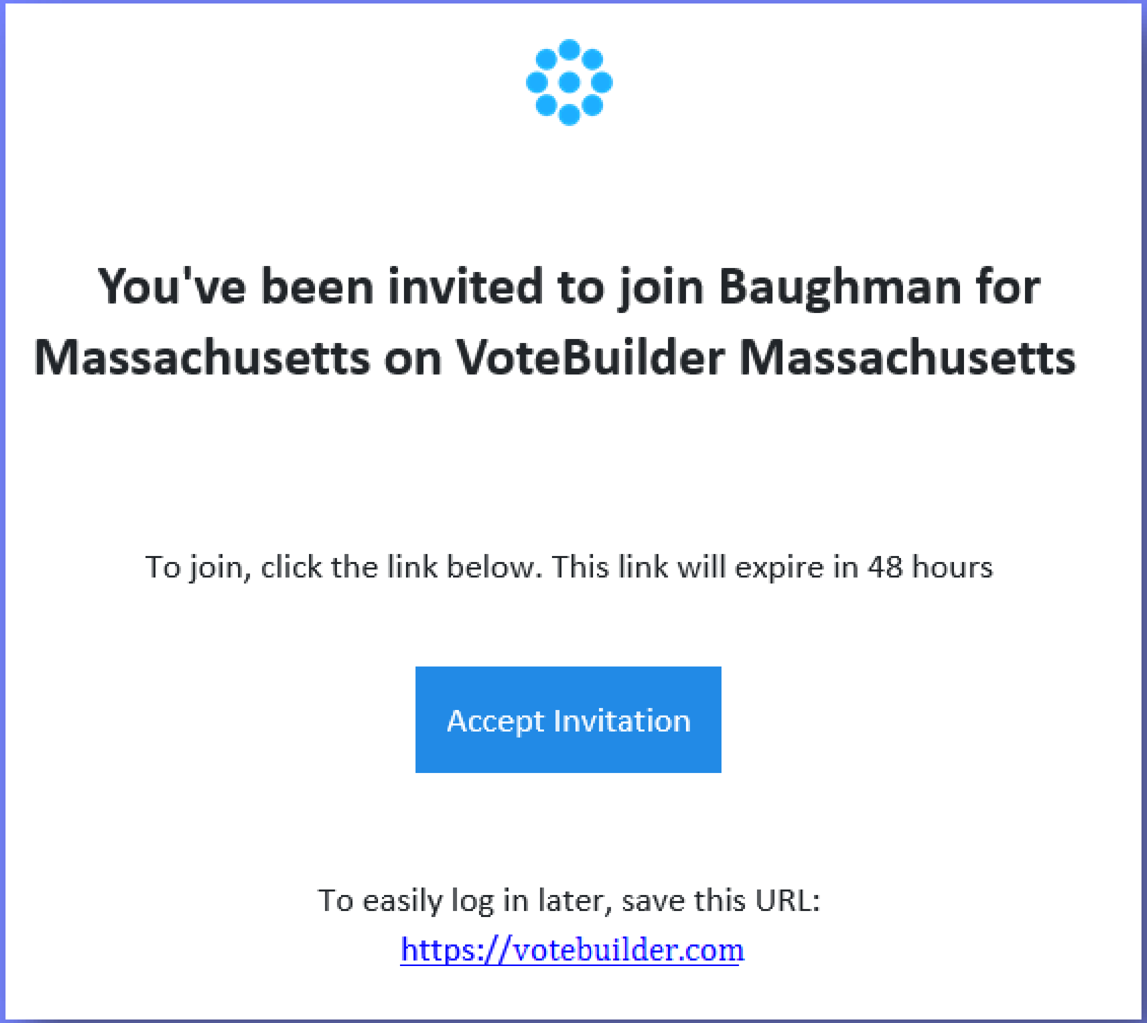
Welcome Email

- New users will automatically receive a Welcome email unless you selected

  "Do not send this user a welcome email."

- The invitation will contain the **Committee** name and the site name, as well as the URL to use for login going forward.
- The invite expires after 48 hours.



Why Volunteer IDs Are Important

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Volunteer Accounts

While we understand that your organization may have many volunteers who assist you, it is paramount that you do not create centralized "blanket" accounts for volunteer users, but to rather give each volunteer their own ID. Individual accounts will give you greater:

- **Transparency:** If someone makes a mistake when entering data, editing a contact record, or while doing anything else in the database, it is easier to identify which person performed that task if your users are not sharing accounts. It will also make it easier to resolve the issue, such as wiping inaccurate data from contact records.
- **Ease:** Volunteers who are doing phone banking and canvassing can simply create their own ActionID and then canvass with MiniVAN and make calls via Open Virtual Phone Bank.
- **Security:** Should any volunteer appear to be doing anything dubious or submitting fake data, it is easier to identify that person and shut down or limit their access if each person has their own user account.

Supporter Groups for Volunteer Organization

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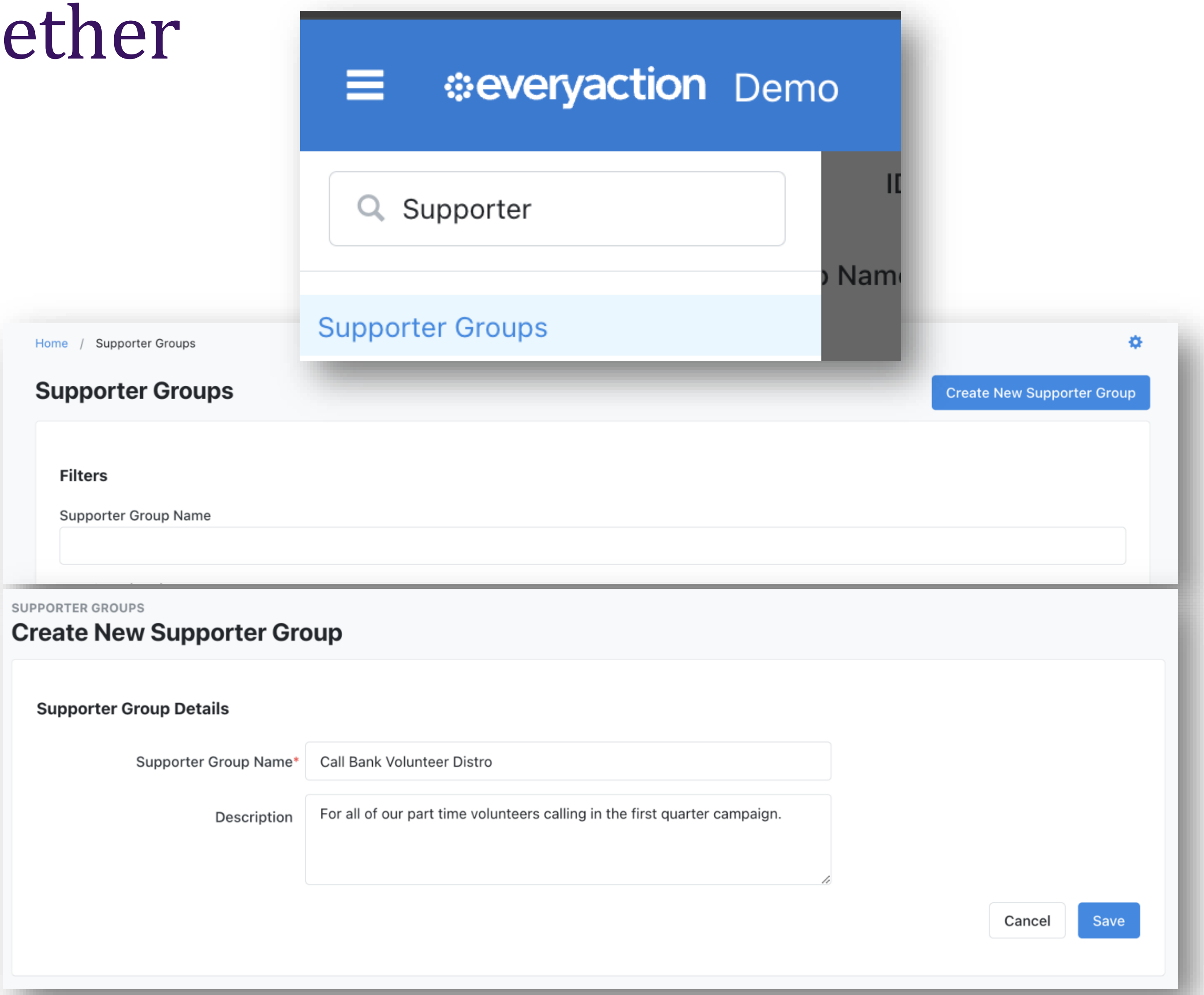
Keeping Volunteers Together

The use of **Supporter Groups** can allow volunteer accounts to be bundled together for easier management of functions and access.

Supporter Groups can be assigned specific names and descriptions through the creation process, and once completed, members can be added to these groups for later use.



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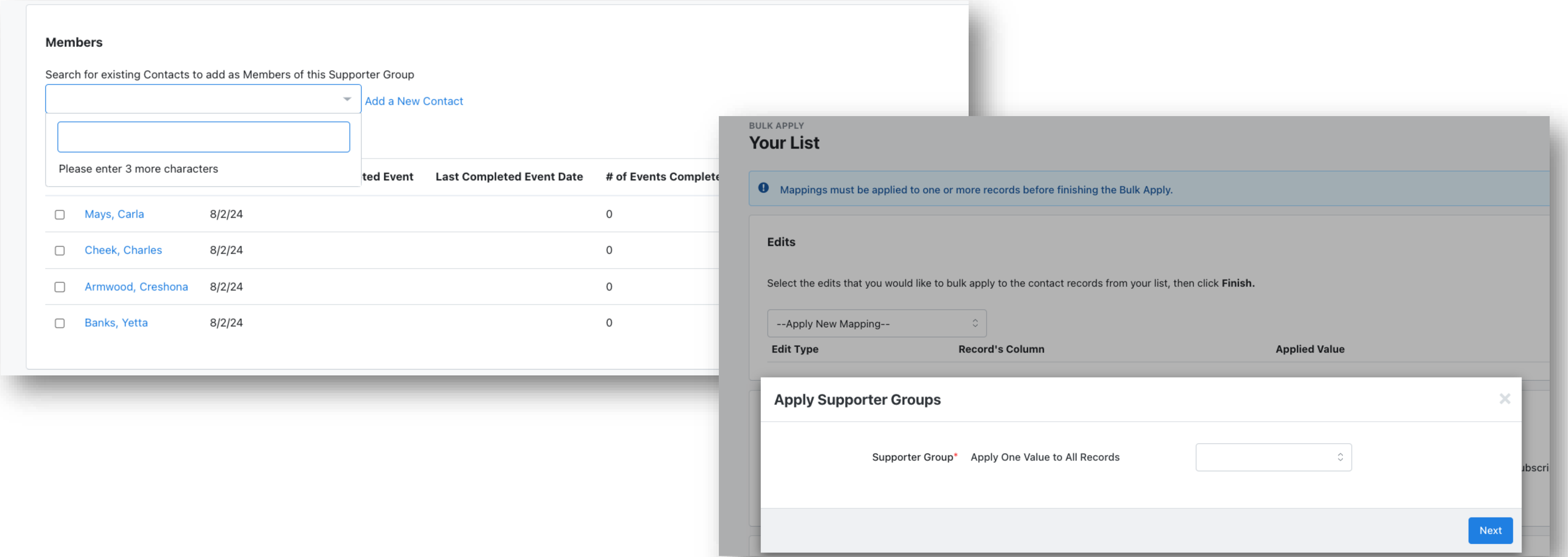
Adding Members to Groups

Once created, members can either be individually added to these groups if they have an existing Contact record within EveryAction directly from the Supporter Groups screen, or through a Bulk Apply/Upload.



Volunteering Actions

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Enabling Volunteers

Within EveryAction, there are 2 main functions wherein volunteering is leveraged:

- Event Shifts
- Virtual Phone Bank

As our main focuses are centered around these two facets, we'll dive a bit deeper into using the Volunteering tool to track how well your volunteers are performing and how much time they're able to dedicate to assisting your organization.

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Event Based Volunteering

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Volunteering Event Flow

At the outset, there is no way for volunteers to indicate themselves as such in EveryAction.

While you may have an established list of contacts who wish to be considered as such, for those who wish to contacts self-identify as wanting to actively volunteer with your organization, this process flow is key in enabling your supporters.

We’ll cover each step of the process moving forward.

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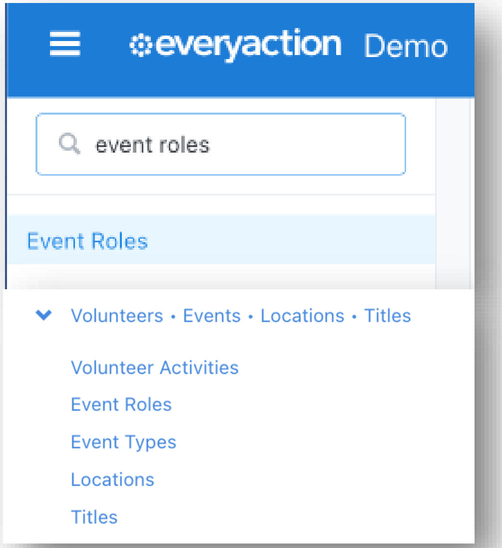
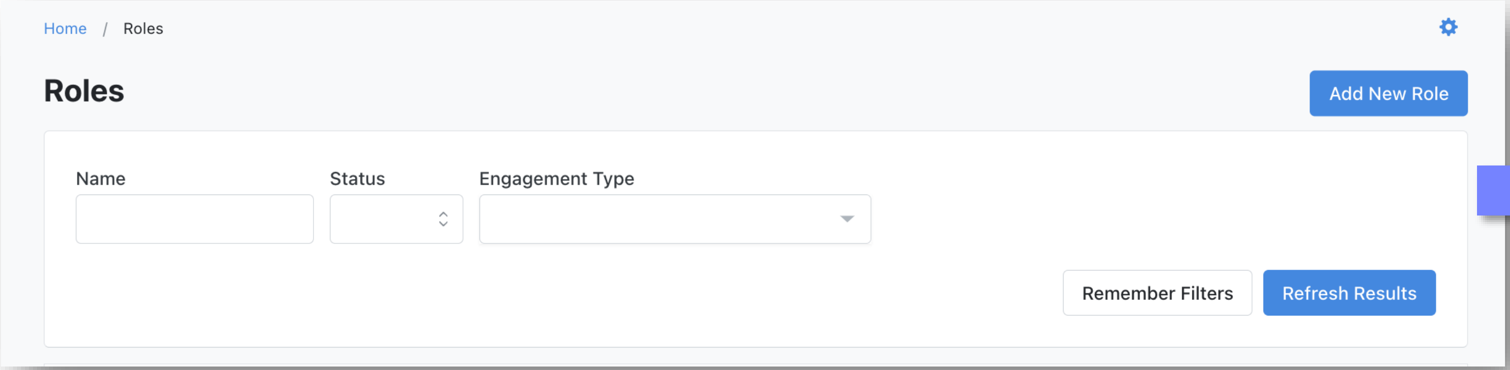
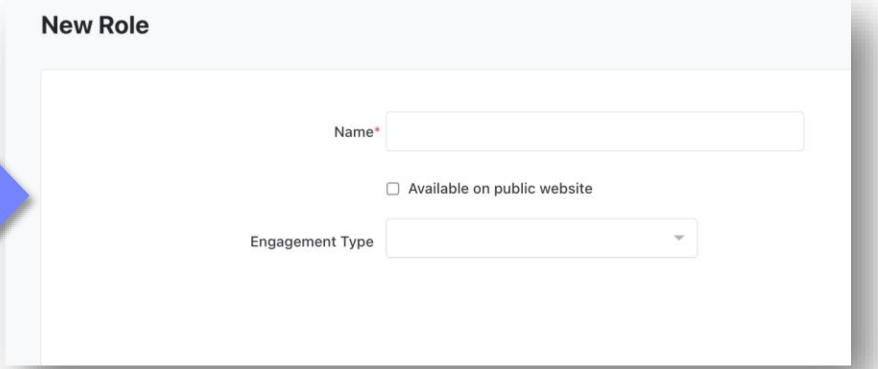
Creating Volunteer Event Roles

You must first establish an Event Role specific to Volunteers, which can be done by using the **Search for a Page** option at the left of the screen, or by heading to the **Administrative Menu>Volunteers-Events-Locations-Titles** and selecting **Event Roles**.

Then, choose to **Add New Role.** As the intent of this process is to publish this online to gain new Volunteers, it is recommended to check the "Available on Public Website" checkbox.



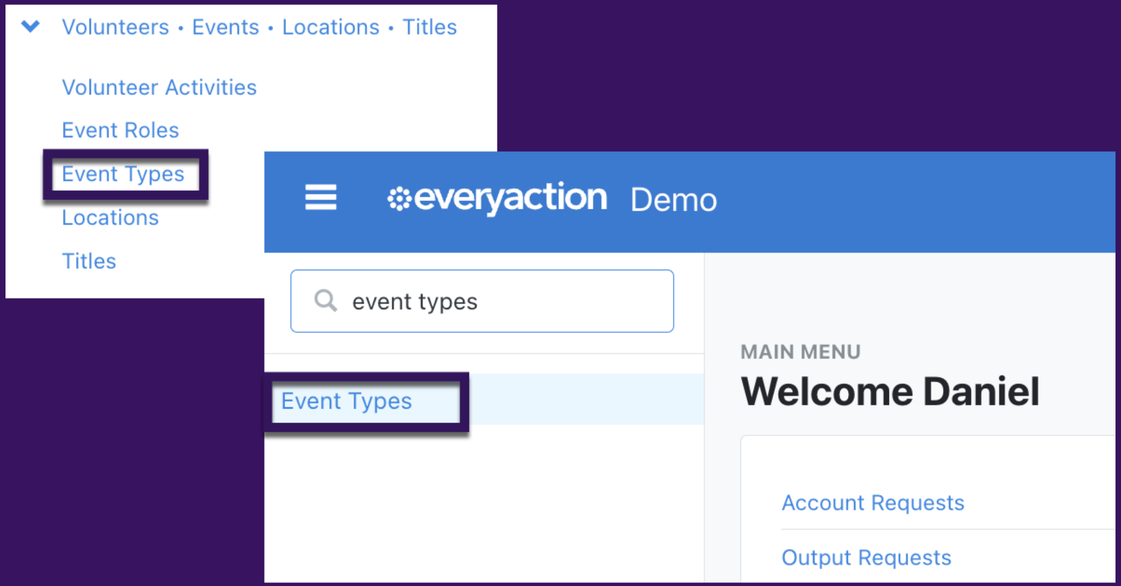




Creating Event Types

As EA does not have a natively available Volunteering type of event, we'll first need to establish this. From your **Search for a Page** menu, or from the **Administrative Menu>Volunteers-Events-Locations-Titles,** choose the **Event Types** option.

Once in the Event Types screen, choose to **Add New Event Type** at the top right of the screen.

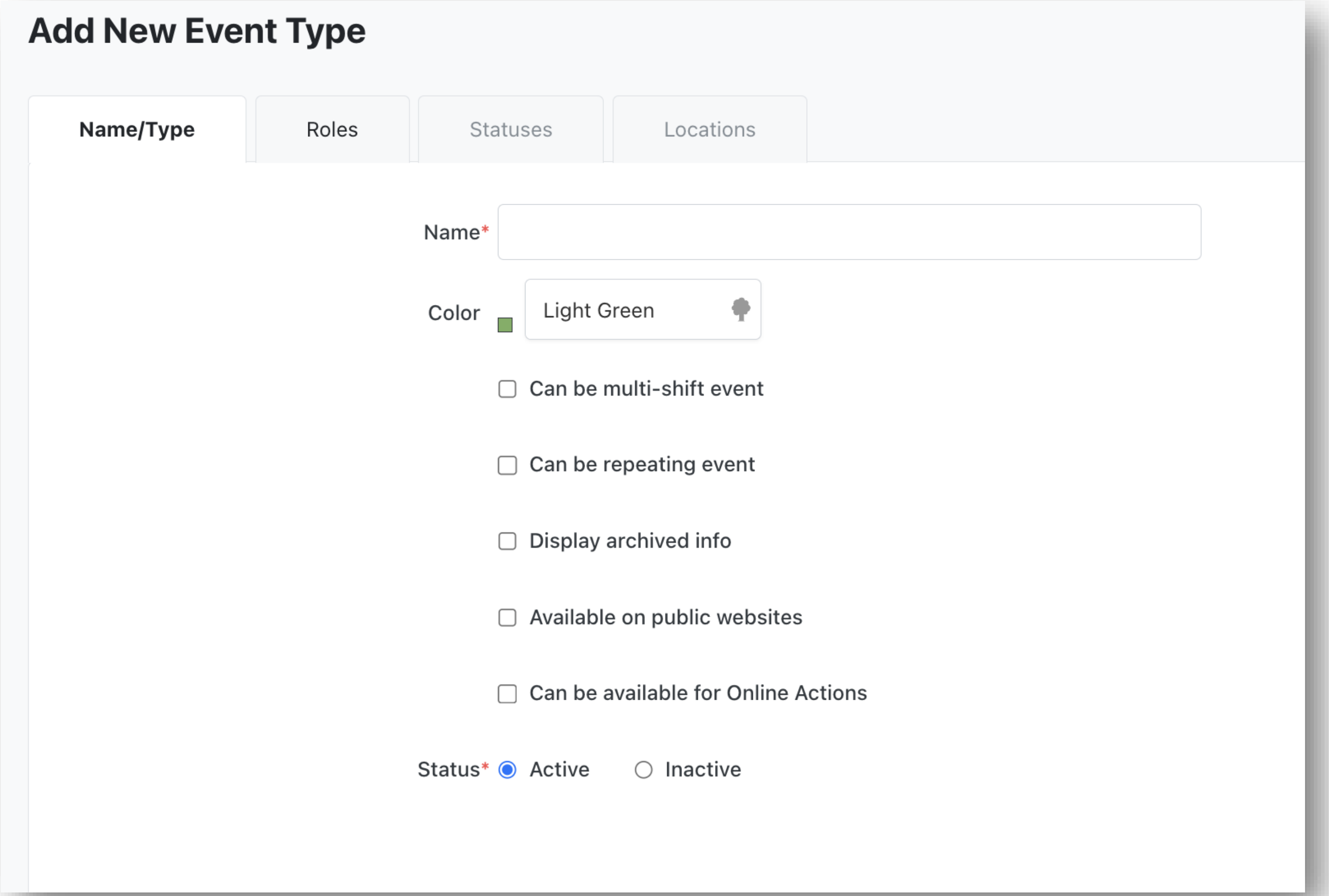


Adding New Event Types

When adding a new Event Type, we're given setup options regarding the details of the Event itself.

The main focuses in this flow will be to establish:

- A type name.
- Whether the event will have multiple shifts, as well as if it will be recurring.
- If this should be available to publish as an Online Action.
- What Roles are linked to this Event Type.



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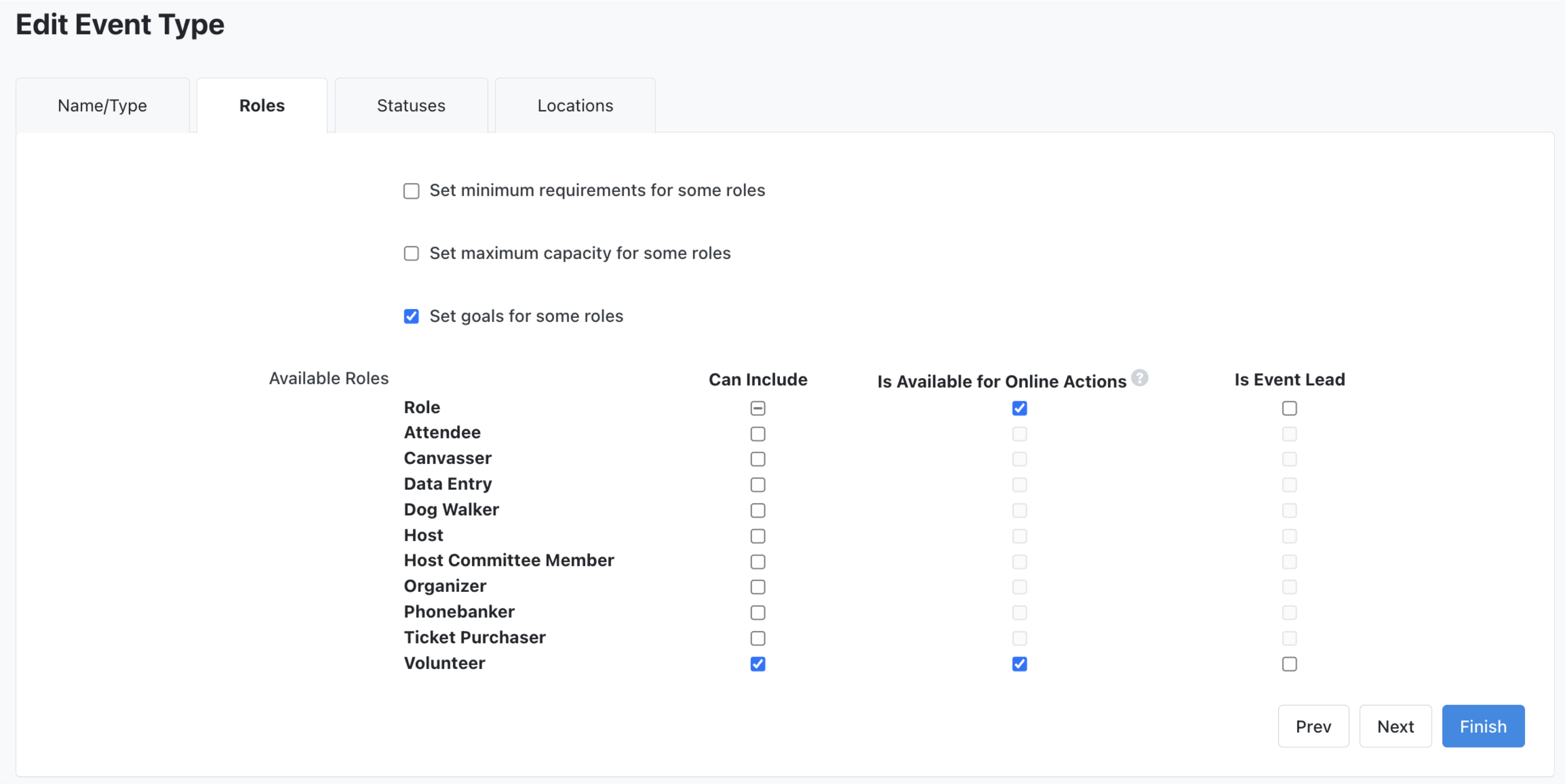
Roles in Events

When setting roles for a new Event Type, it is extremely important to ensure that our Volunteer role is selected as “**Can Include**”, and “**Is Available for Online Actions**”, as this will be integral to allowing interested parties to register themselves as volunteers online. If this event type is to have a maximum limit of volunteers, we can choose to set that by checking the **Maximum Capacity** box as well.



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Statuses and Locations for New Event Types

Event Type Statuses are meant to define what status can a prospective registrant have. In most cases, we would see examples of:

- Confirmed
- Completed
- No Show
- Sched-Web (Indicating they registered online)

However, you are not limited to only these statuses if your registration process or statuses are more complex.

Event Locations are only meant to dictate the *default* expected physical location of the event. By choosing a location from this screen, this does not lock the location for when a new event of this type is created.

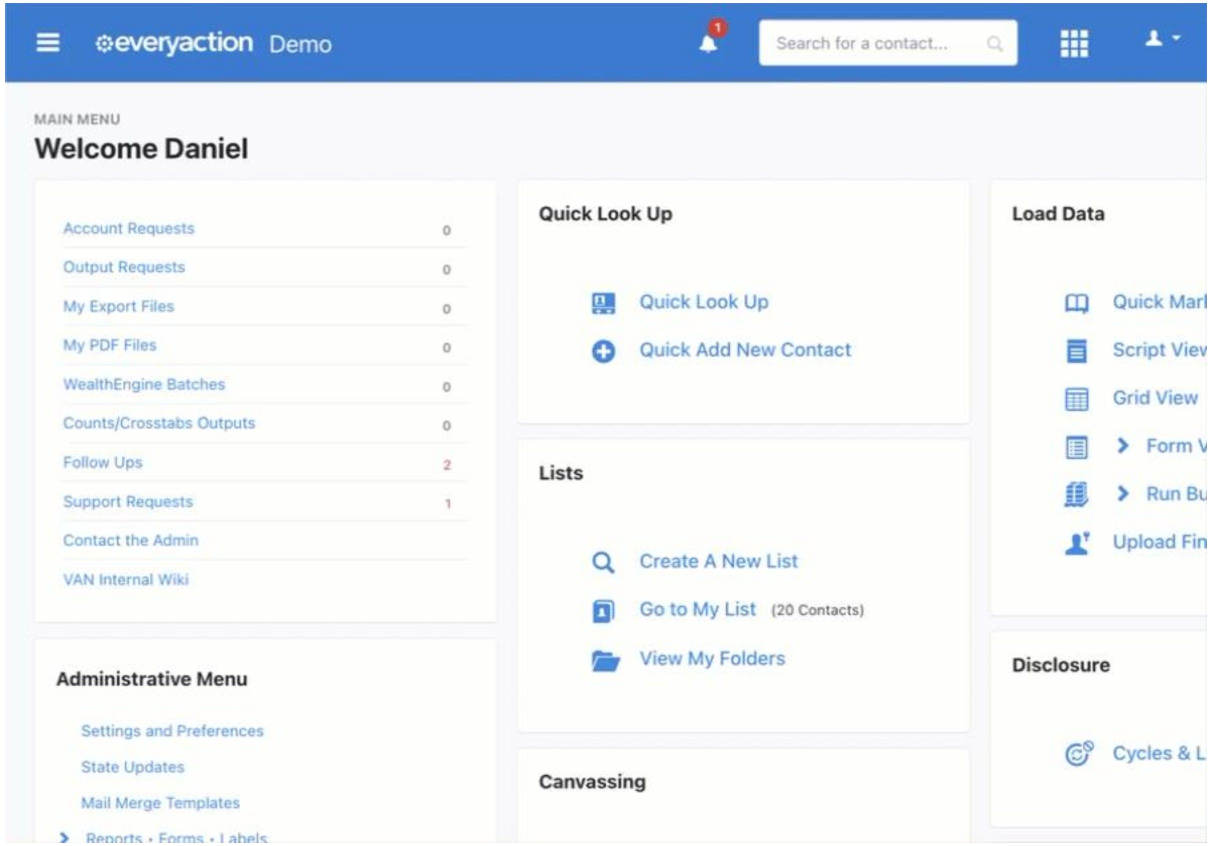
Creating Form Templates in Online Actions

"Free" events are unique in that they're the only type of true *template* that can be created through Online Actions.

To create these, access **Online Actions, and choose the Templates tab.** Choose to *Create New Form Template* and select **Event Signup.**

The process for creating Form Templates is nearly identical to the process for creating any other form in OA, with the exception of the following fields included in the Build Page step:

- Event Information
- Terms



Creating the Volunteer Event

Now that a template has been established for Event Signups, the Event List in the CRM must be accessed to establish a new event to track registrations.

From the EveryAction main menu, you may either **Search for a Page** and enter **Event List** or navigate to the bottom right of your main menu to the Events section, and click **Event List, then choose to Add New Event** at the top right of the page.

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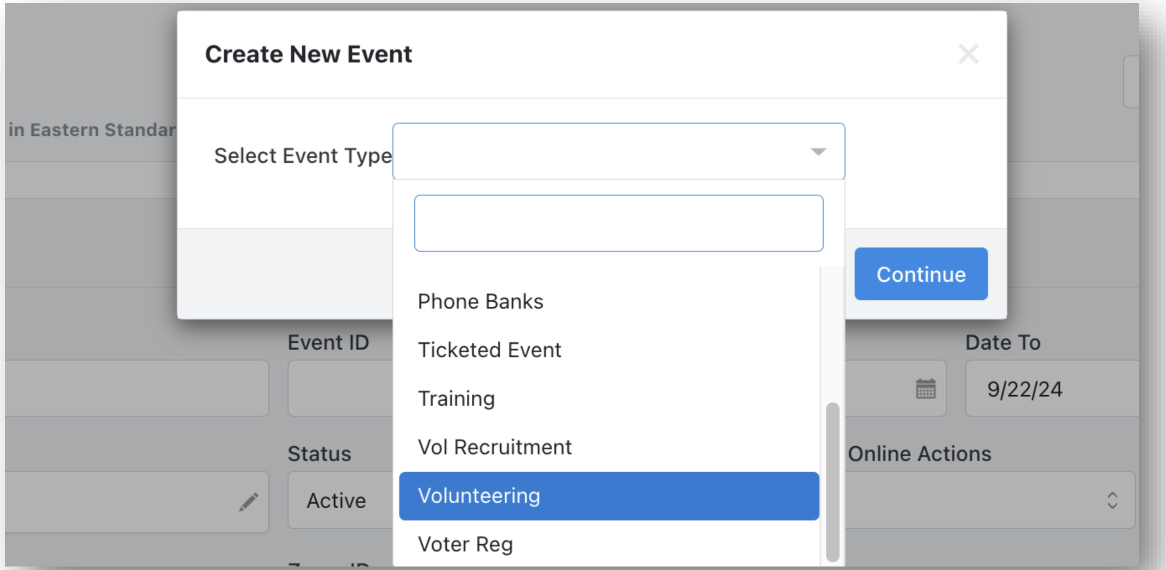
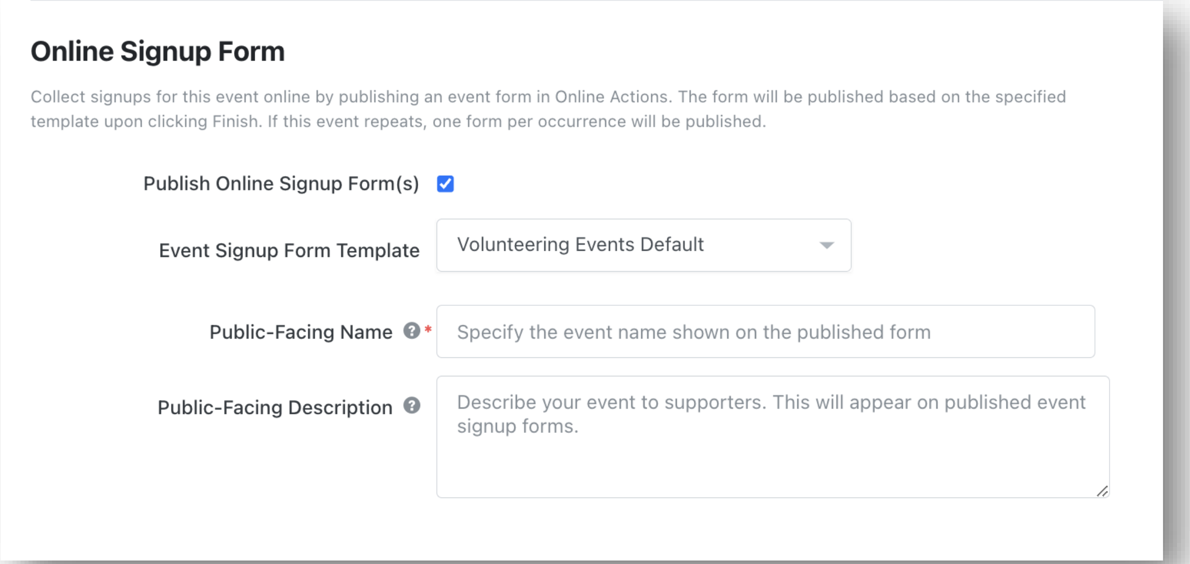
Event Creation Workflow

Name

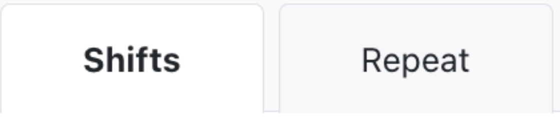
When selecting an Event Type, use the newly created "Volunteering" category.

Within the Event Details, set your default information for the event itself as needed, but now that an Event Signup template has been created, we can also link this event to a public-facing signup form.



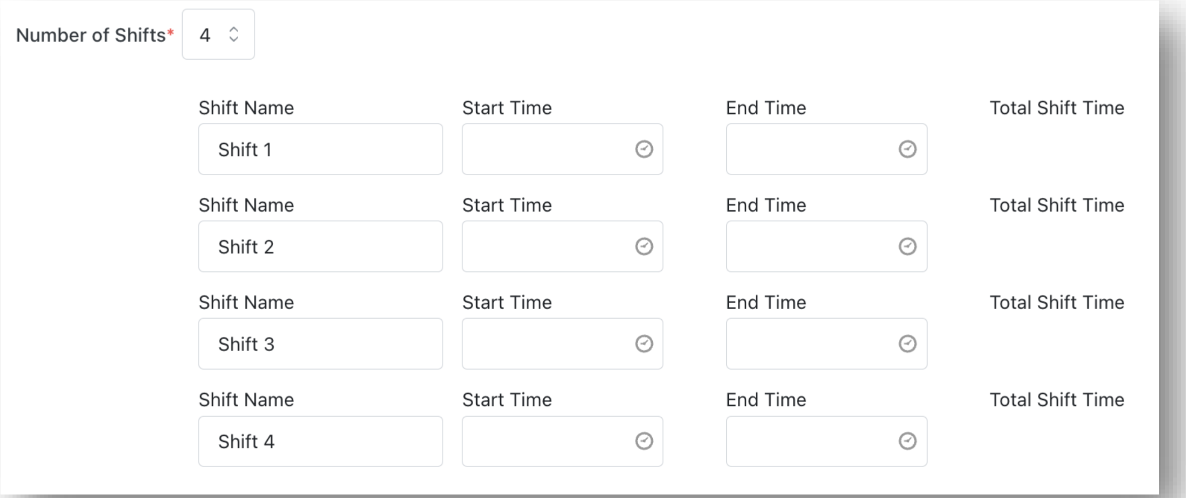


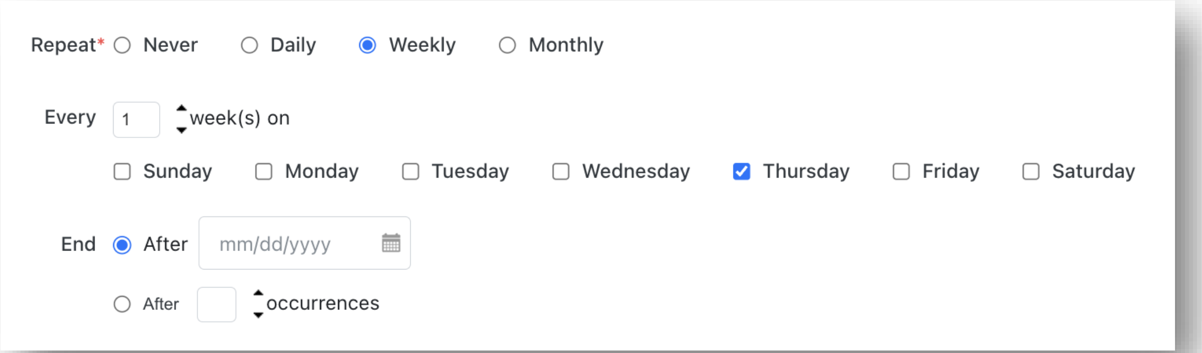
Event Creation Workflow



If your Event contains multiple shifts wherein the volunteers can work, we can establish up to 9 separate shift windows in this step. This step is integral in reporting time worked for your volunteers.

The Repeat tab will allow for the event to recur at regular intervals, whether those are daily, weekly, or monthly.





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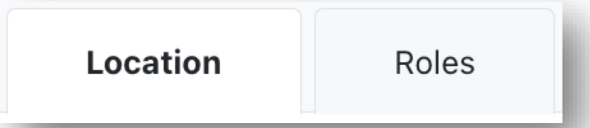
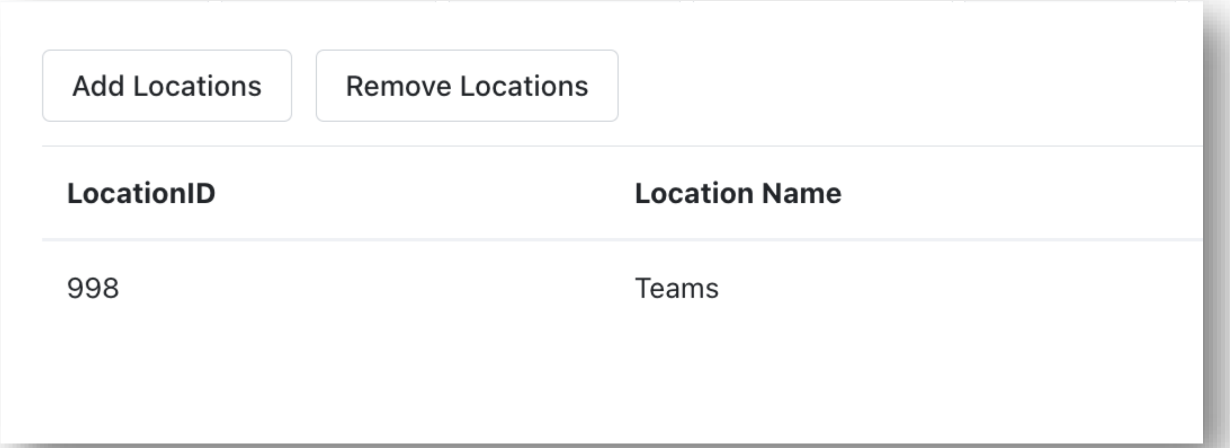
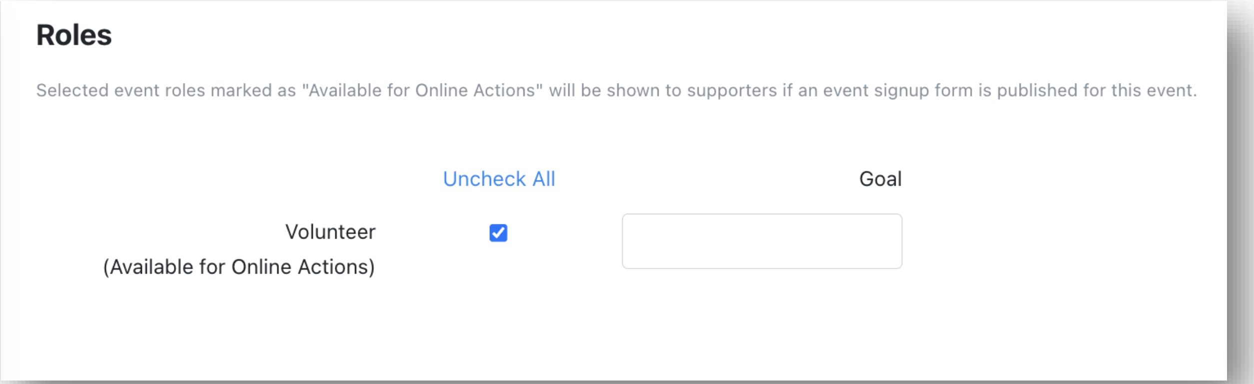
Event Creation Workflow



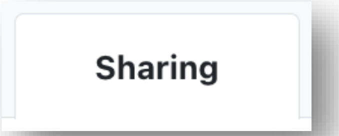
Location allows your Event to be set at a specific physical or digital location. This setting is important as it will directly tie to the use of the Event Detail-adjacent Merge Fields for your Online Actions and outbound communications regarding the Event.

Roles will directly tie into the selections made during the creation of this Event Type and represent what Roles a supporter may register themselves as when submitting a form online.

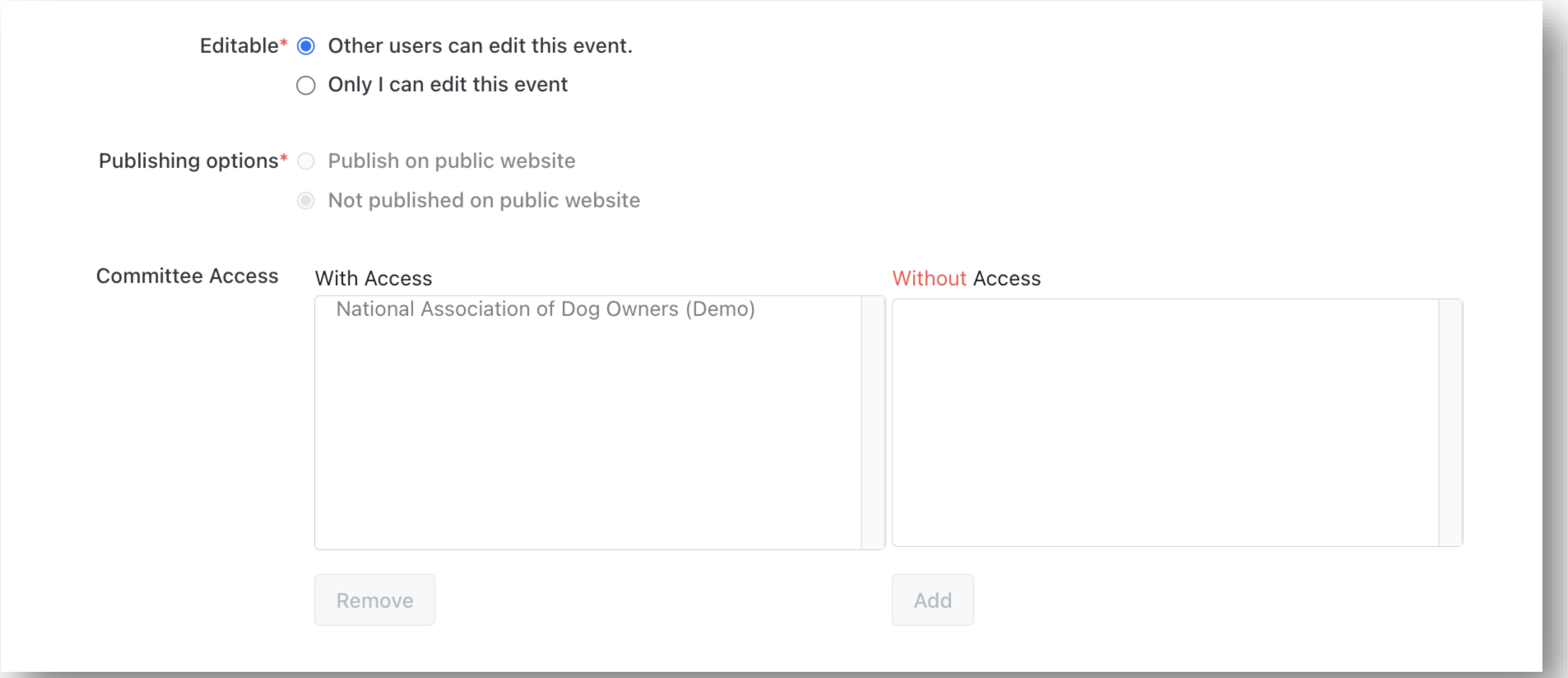




Event Creation Workflow



The final step in the Event Creation process will be to enable/disable specific sharing settings. These include the ability to allow the event to be edited by only you or other admins within your committee, if the page can be published on public sites, and finally if the event should be shared across committees for those organizations that have satellite or central committee links.



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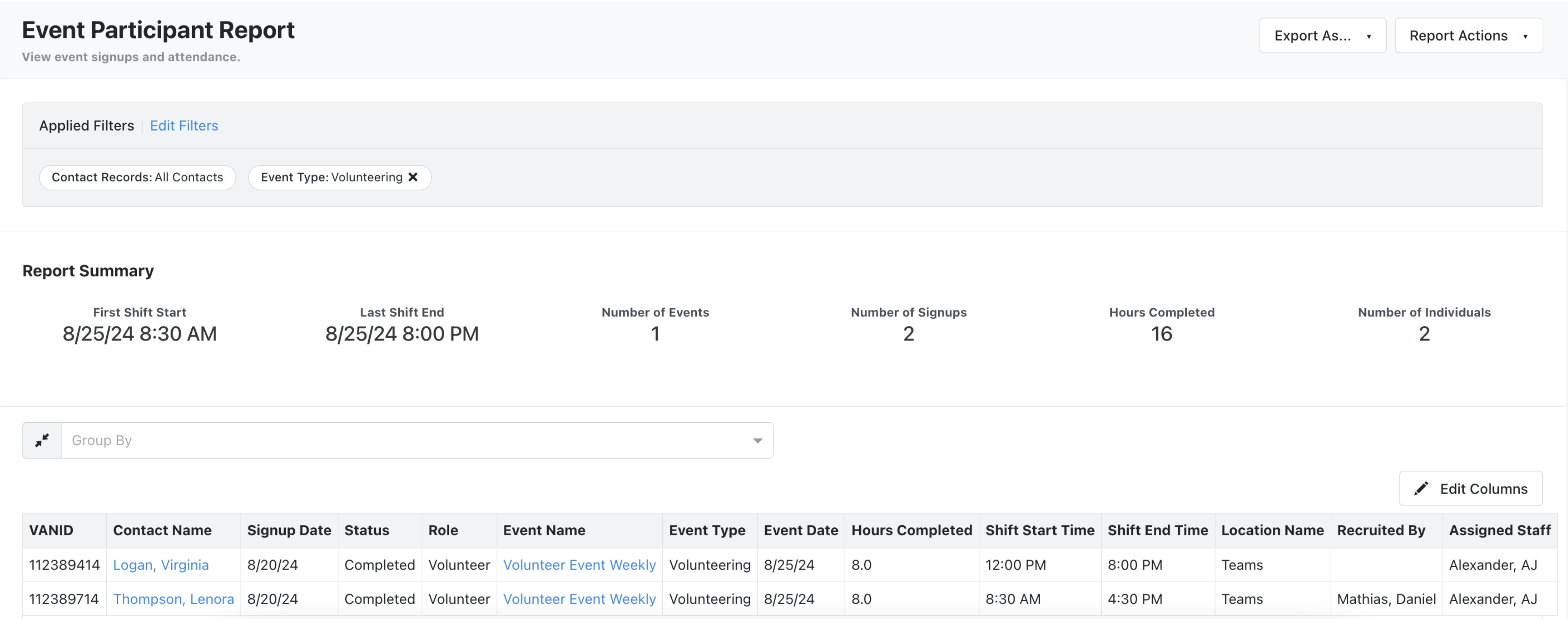
Reporting on Volunteered Time

The culmination of the efforts put forth in creating our own custom Volunteer Event Type or by including the Volunteer role in Events will show through in reporting on time logged. This can be shown by running the **Event Participant Report** for raw data on who has registered, under what shift, date, and their hours completed.



Event Participant Report

View event signups and attendance.

Export As... | Report Actions

Applied Filters | Edit Filters

Contact Records: All Contacts | Event Type: Volunteering

Report Summary

First Shift Start	Last Shift End	Number of Events	Number of Signups	Hours Completed	Number of Individuals
8/25/24 8:30 AM	8/25/24 8:00 PM	1	2	16	2

Group By

Edit Columns

VANID	Contact Name	Signup Date	Status	Role	Event Name	Event Type	Event Date	Hours Completed	Shift Start Time	Shift End Time	Location Name	Recruited By	Assigned Staff
112389414	Logan, Virginia	8/20/24	Completed	Volunteer	Volunteer Event Weekly	Volunteering	8/25/24	8.0	12:00 PM	8:00 PM	Teams		Alexander, AJ
112389714	Thompson, Lenora	8/20/24	Completed	Volunteer	Volunteer Event Weekly	Volunteering	8/25/24	8.0	8:30 AM	4:30 PM	Teams	Mathias, Daniel	Alexander, AJ

Phone Bank Volunteering

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The Call is Coming from Inside the System

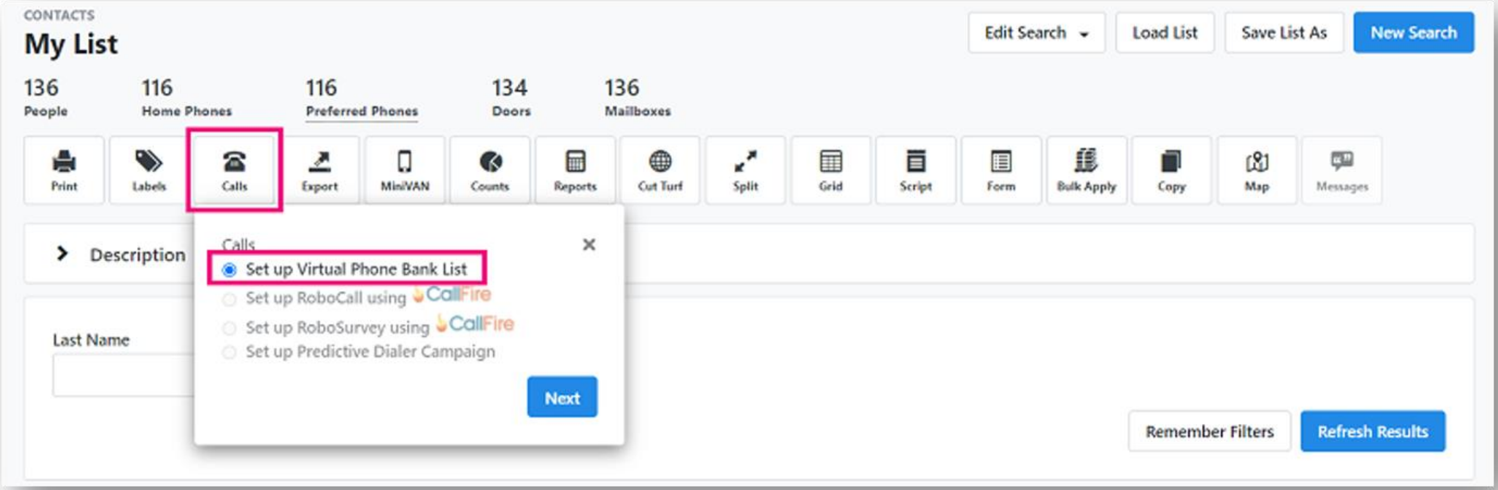
While EveryAction's calling system does support external access through OpenVPB, allowing Volunteers to be added to your user base via an assigned ActionID is a secondary option for call banking through local or loyal Volunteers.

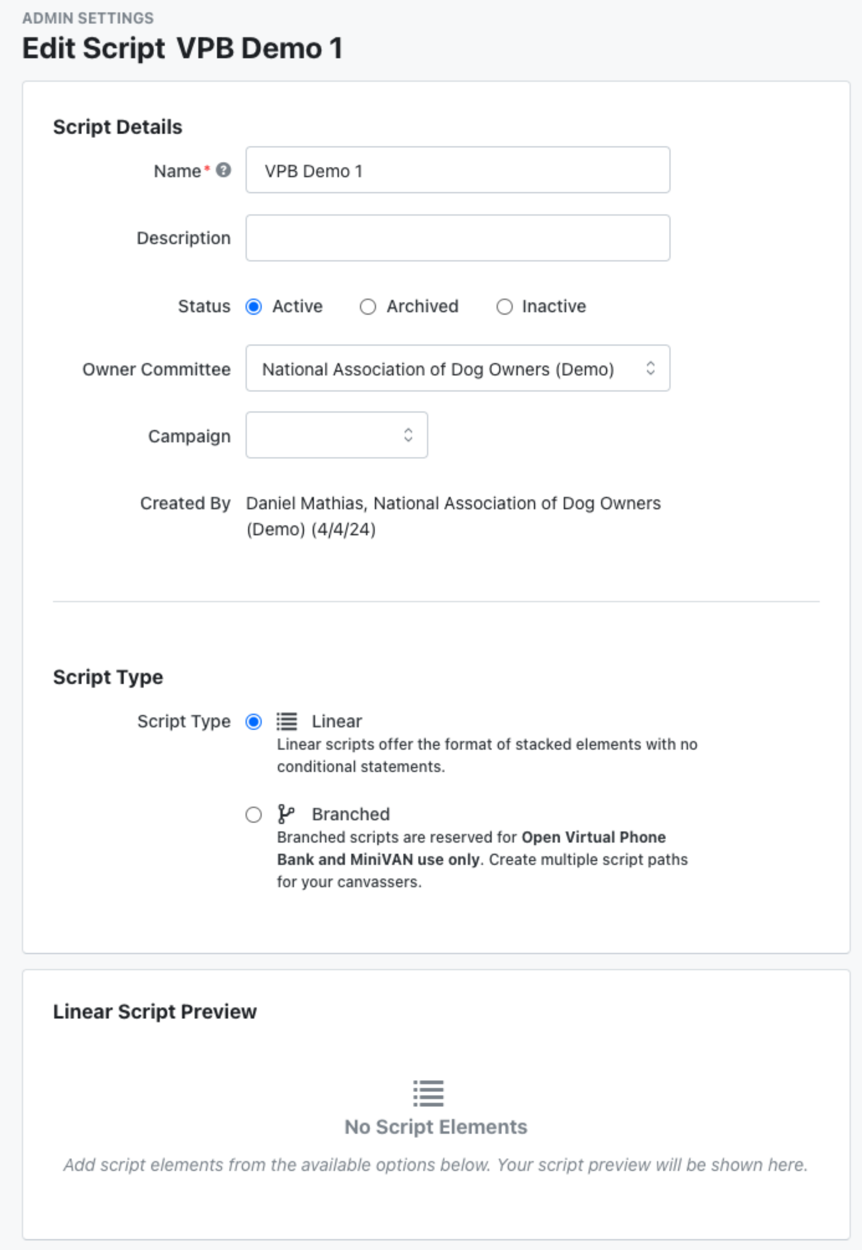
While the main overviews of creating Scripts and Calling Campaigns are covered in more detail through the training section on Phone Banking, this section will cover the basic steps needed and what it looks like for a Volunteer to engage with a calling campaign directly through the EveryAction interface.

Configuring your scripts & lists

Within EveryAction, we can access **Scripts** from the Search for a Page menu to create linear or branched text and questions for your volunteers to use guidelines for your outreach efforts. This will also allow for assignment of **what data volunteers can access or change during a call, through the “Display Settings” in Script setup.**

A list must then be created to narrow down who will be called. This can be done through Create-A-List, and by choosing the **Calls** button as shown below, or by simply saving your list.

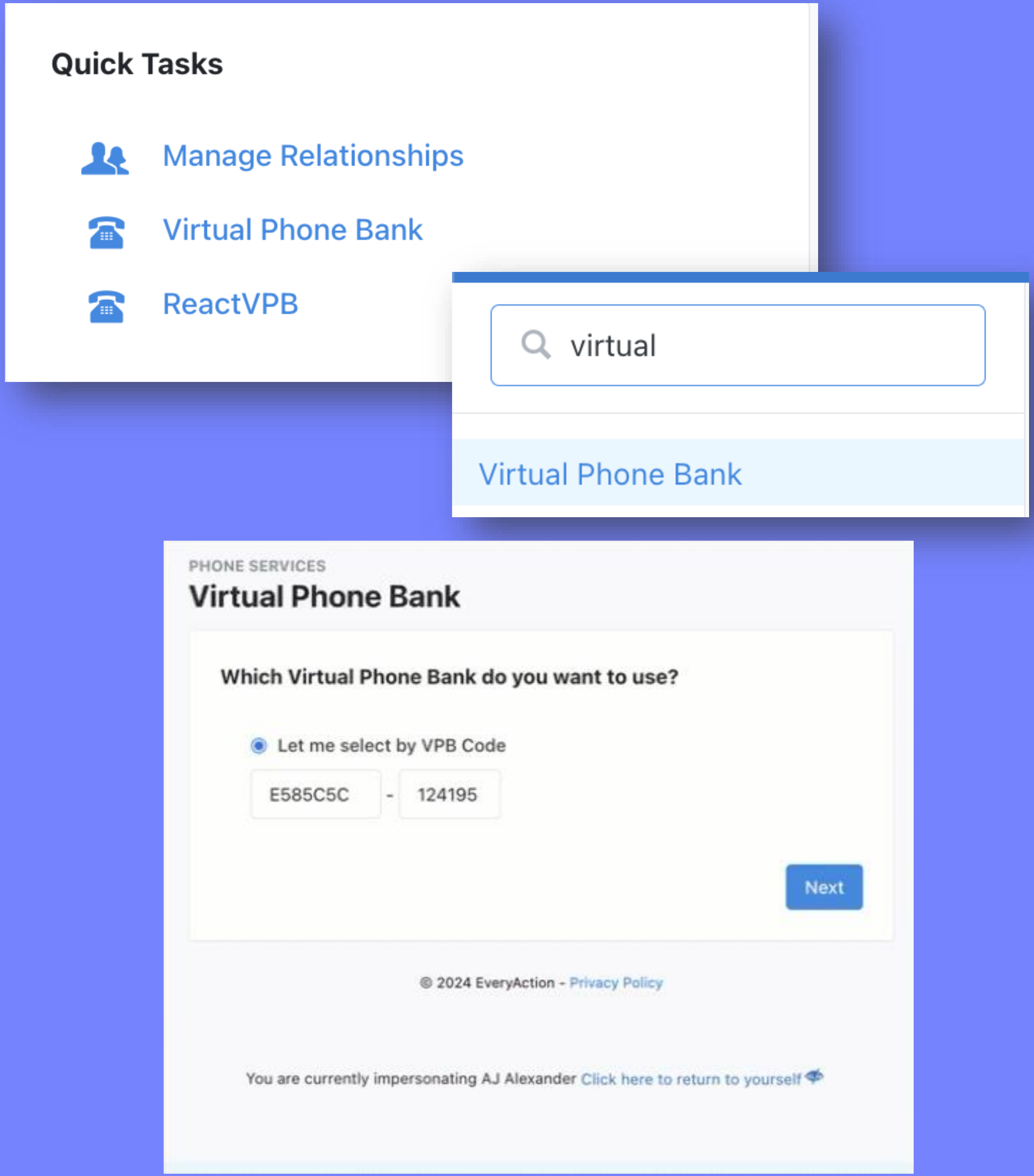




VPB: The Volunteer Experience

For those volunteers that are making calls, the typical process would be:

- Logging into EveryAction using their ActionID
- Accessing the **Virtual Phone Bank** module, either from Quick Tasks or the Search for a Page menu.
- Once within the Phone Bank, Volunteers will either enter a specific VPB Code or select a list saved and assigned to the specific Volunteer.
- The Volunteer will also be asked to enter their ZIP Code.



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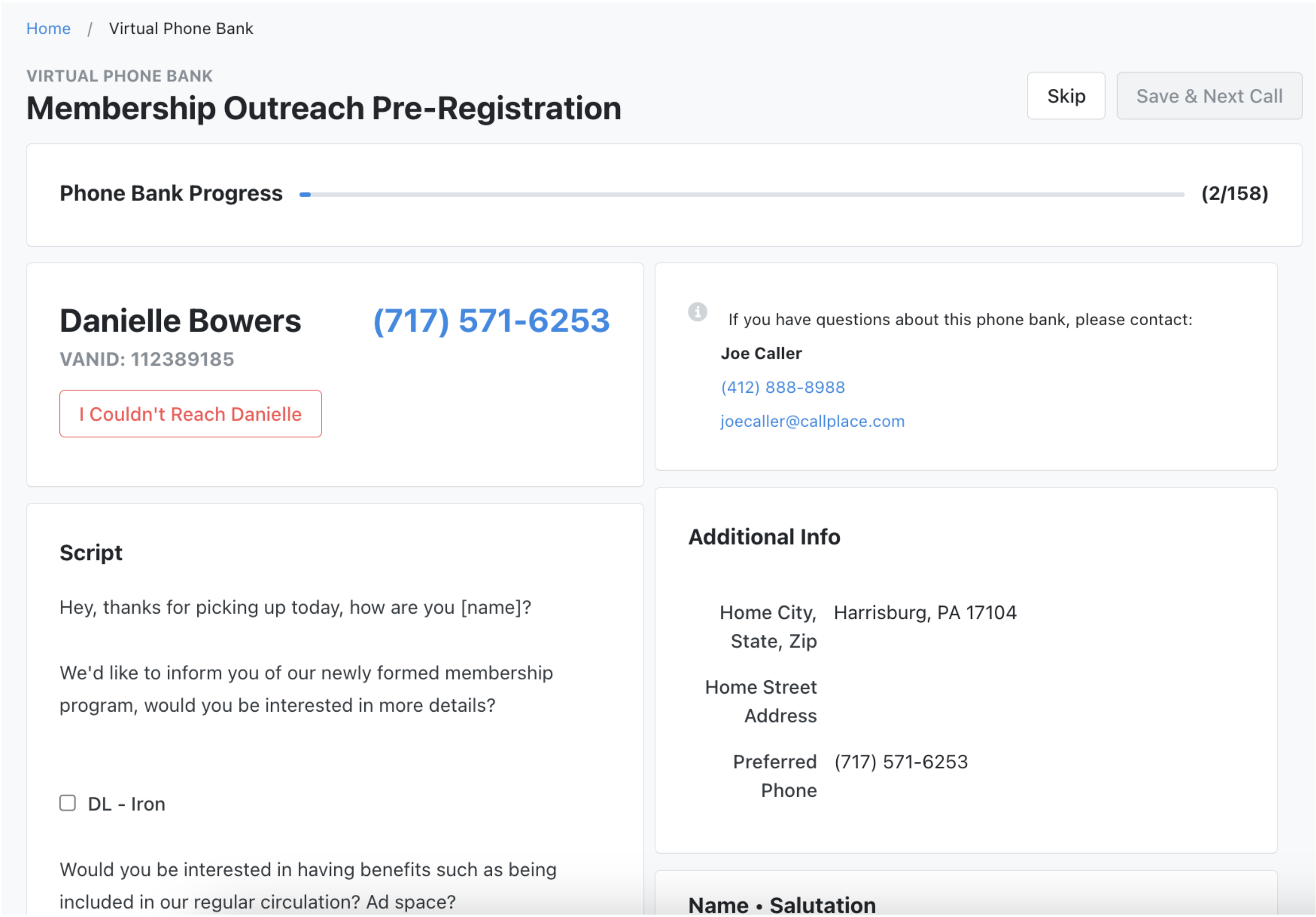
The Phone Bank Layout

Based on the settings defined when creating the phone bank, callers will be shown the details of Contacts included in the list of reachable phones.

The script linked to the Phone Bank will be displayed at the left of the screen for the caller to follow, along with the potential to link call recipients to events, activist codes, as well as survey responses.

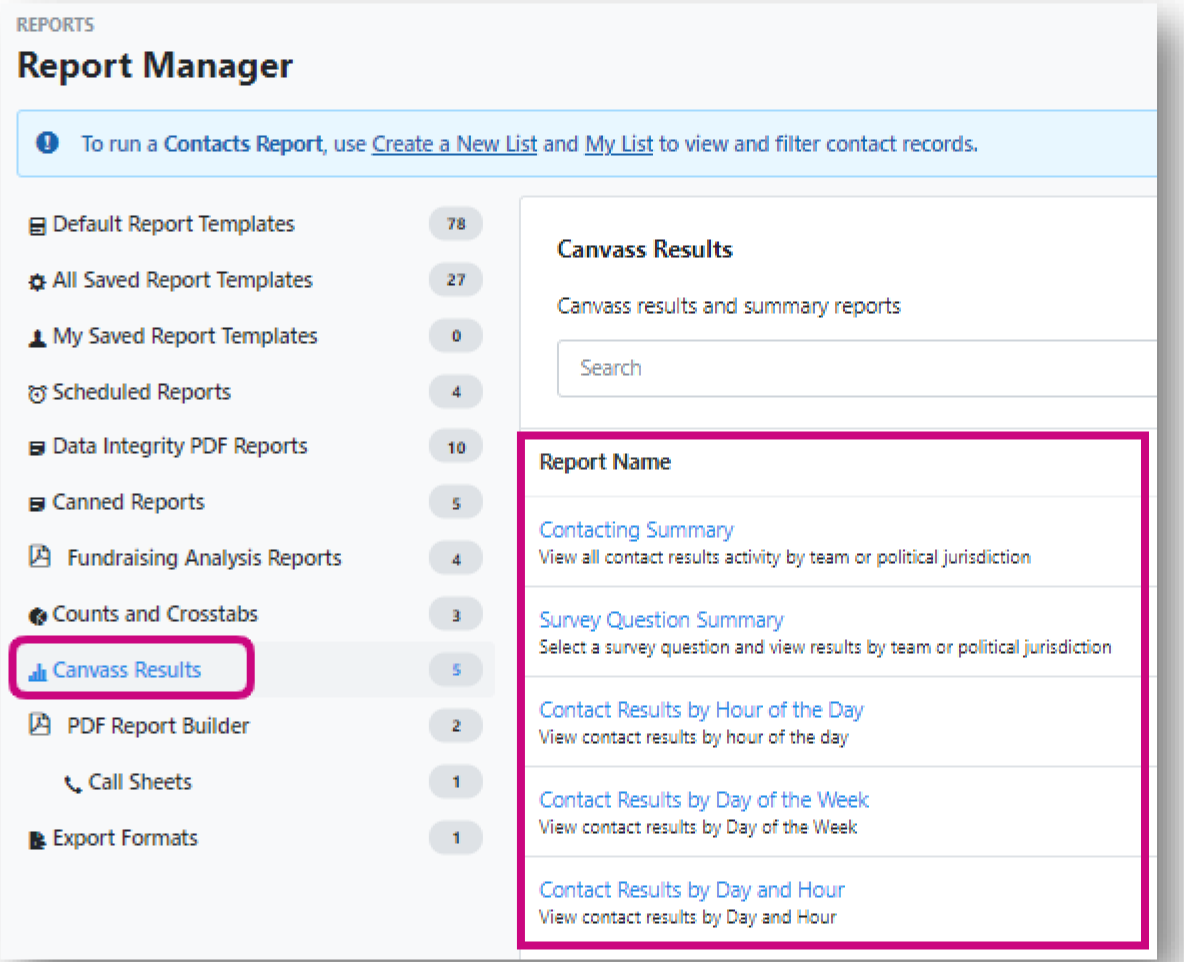


Viewing Results

Monitor your progress and measure the effectiveness of your phone outreach using these reports:

- Phone Contact History Report
- Phone Number Report
- Survey Response Report
- Virtual Phone Bank Report
- Canvass Results Report

While Canvass Results Reports are not specific to phone campaigns, you can use the report filters to narrow results to phone outreach or survey responses.



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The Volunteer Management Dashboard

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Dashboard Overview

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.

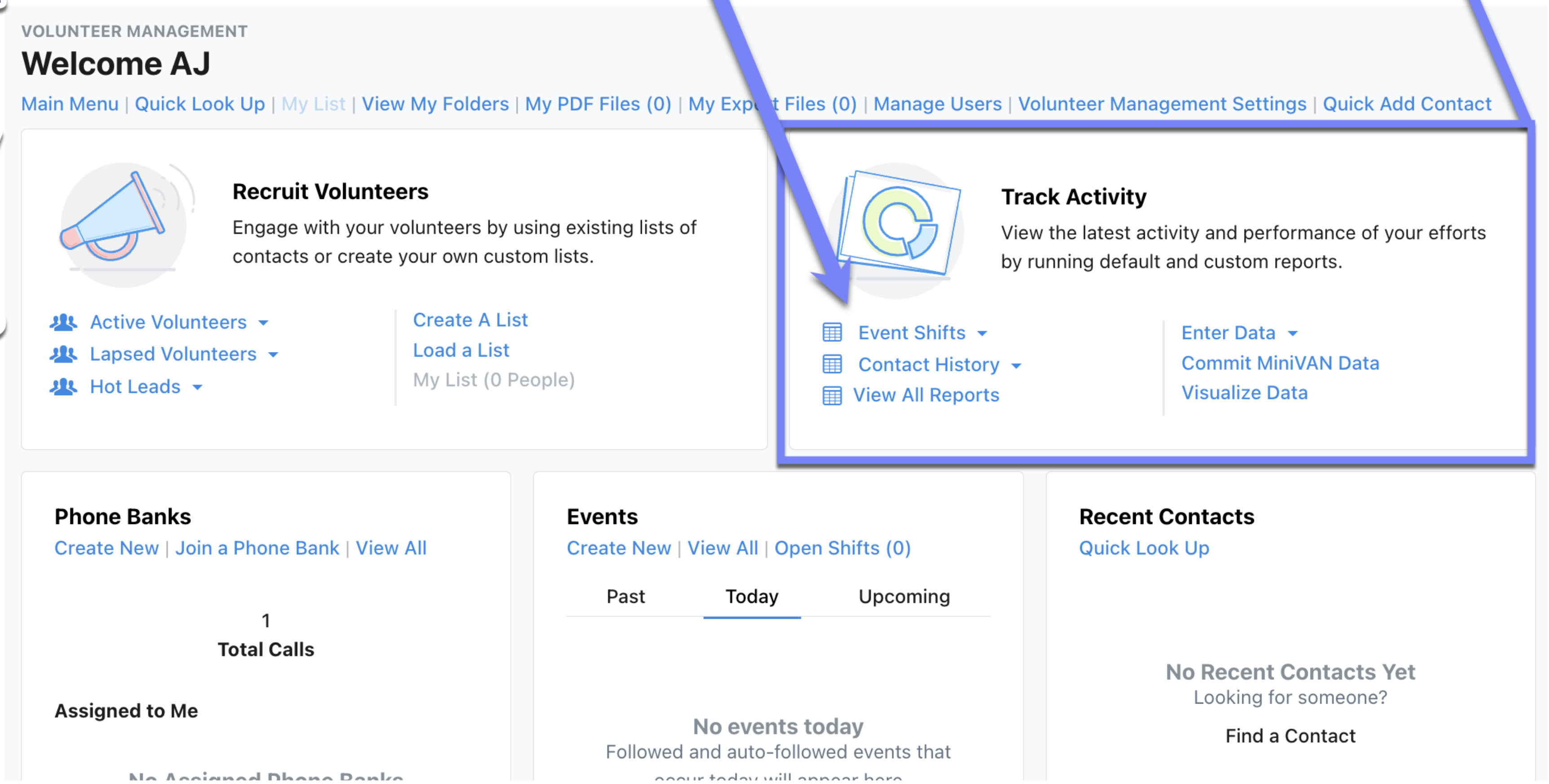
Lapsed Volunteers is a list of previously active volunteers who have not completed a shift in the last 30 days.

Selecting one of these will give you a description of the search, as well as, the option to Load to My List, Create a Virtual Phone Bank, and Run Event Participant Report.

The Track Activity Card:
- Event Shifts will predefine reports to be pulled in the Event Participant Reports
- Contact History will send users to the Contact History Report for the selected time frame.

Enter Data allows users to Bulk Upload, Quick Mark, or generate lists in Form or Grid View.

Visualize Data will bring users to the Analytics Dashboard



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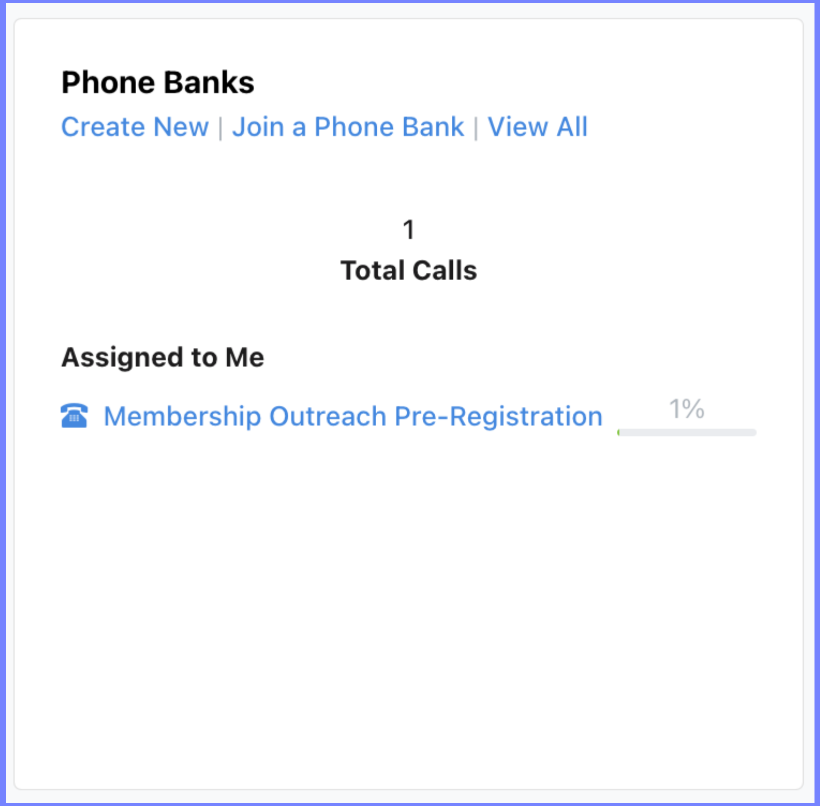
The Phone Bank Card

When a Volunteer is assigned to a Phone Bank, the user will be available to review their progress on those phone banking efforts.

Depending on the degree of permissions assigned to the Volunteer, they may also have the ability to join additional created Phone Banks in your list, as well as to create new Phone Banks directly from this card.

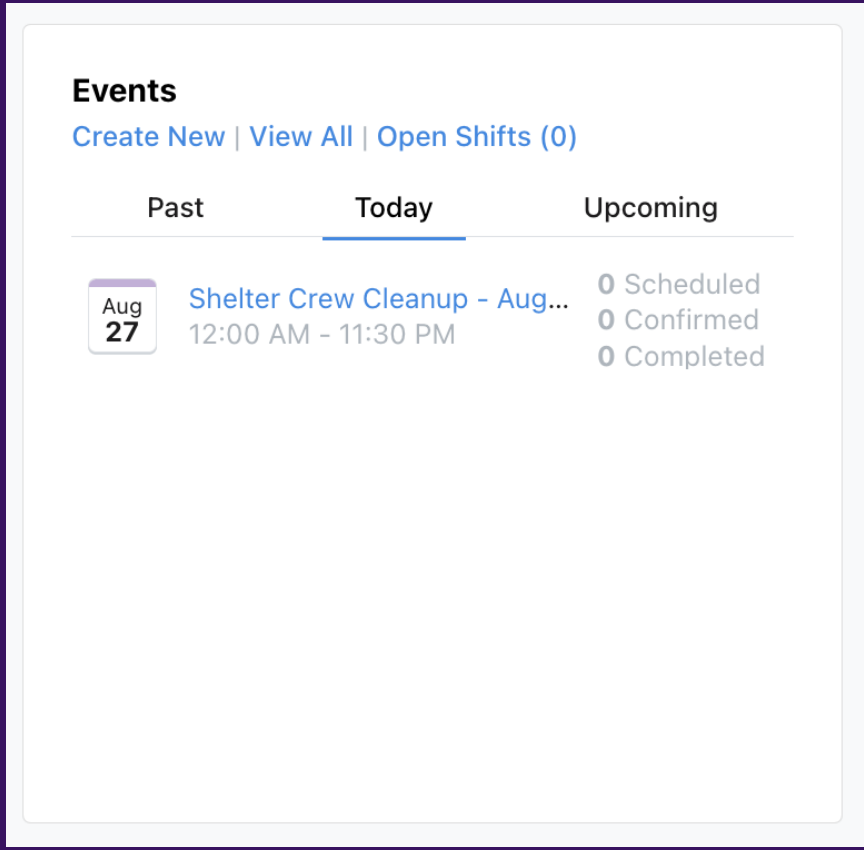


The Events Card

From the Events card, Volunteers can view any followed events or any Events that they've created and auto-followed.

This card will only show anything occurring in the last 7 days in the past or up to 7 days in the future.

Clicking on any eligible Events will enable the Volunteer to manage attendees or any other facets of the event their permission level may allow.



Engagement Points

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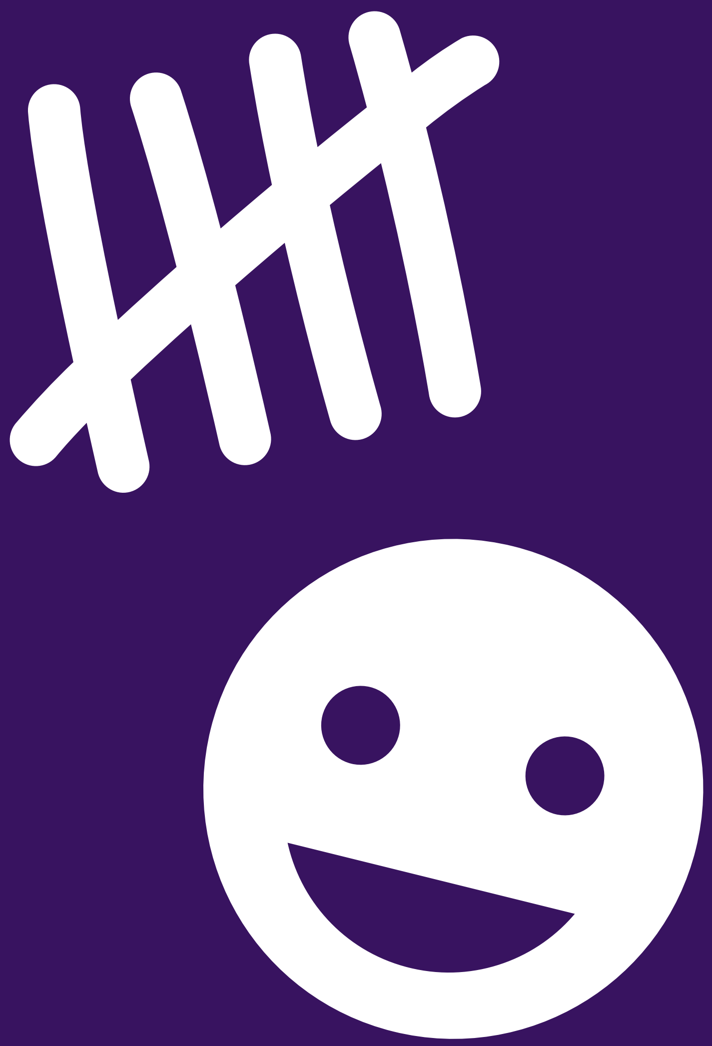
Tracking Those Who Support You Most

Engagement points should be considered the most passive way to determine who, of your engaged Contacts, interacts with your organization the most.

In that sense, Engagement Points proactively apply based on your supporter's actions in a variety of Engagement Types such as contributions, form submissions, or event participation.

While the system has a default set of Engagement points, most organizations will opt to create their own Engagement Types and decide how many points to assign for each kind of action. You can then link them to Activist Codes, Master Survey Questions, Event Roles, Contributions, and Form submissions.



How Are Engagement Points Assigned?

As Engagement Points are a system-default, these are currently being tallied in the system using pre-defined coding to append to a Contact. While the point amounts per action type and names of the categories can be adjusted, the System Labeled options cannot be altered otherwise.

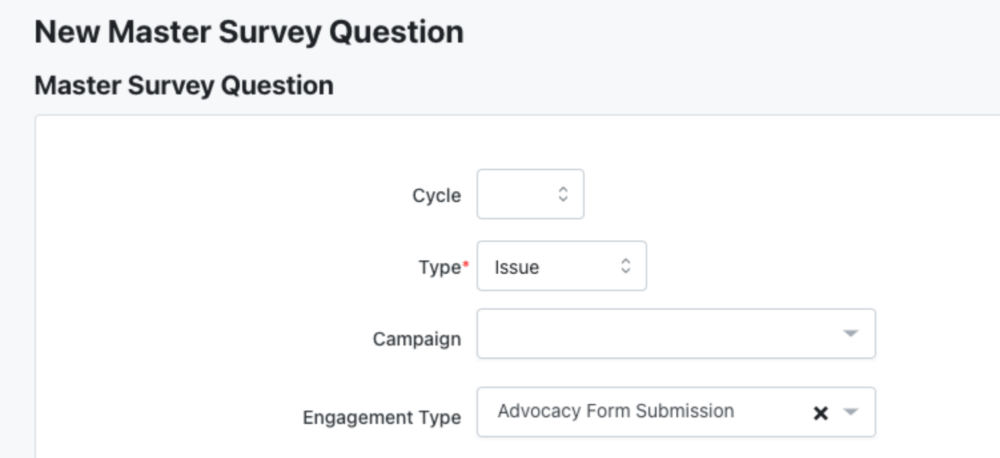
Advocacy Form	1
Contact Contribution	1
Contribution Form	1
Event Host Form	1
Event Signup Form	1
Peer to Peer Form	1
Petition Form	1
Self Service Portal	1
Self Service Portal Request	1
Signup Form	1
Story Collection Form	1
Ticketed Event Form	1
Volunteer Form	1
Volunteering	20

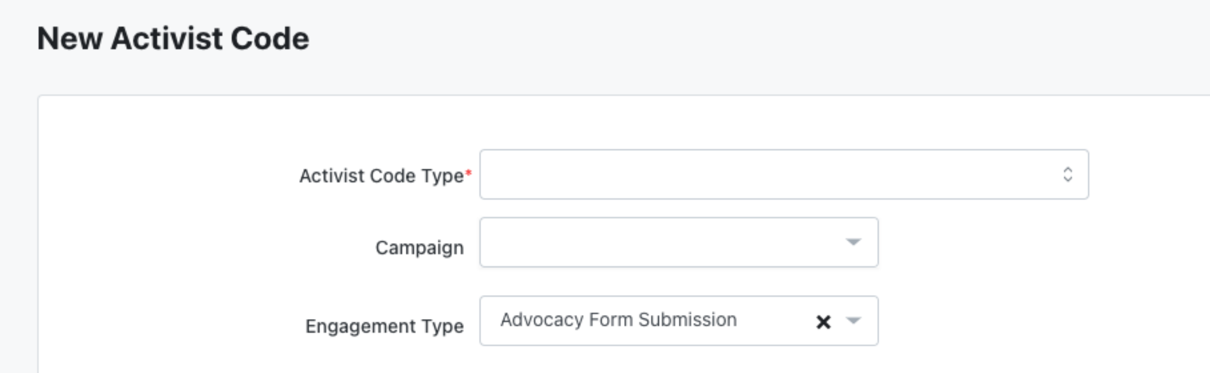
Customizing Engagement Types

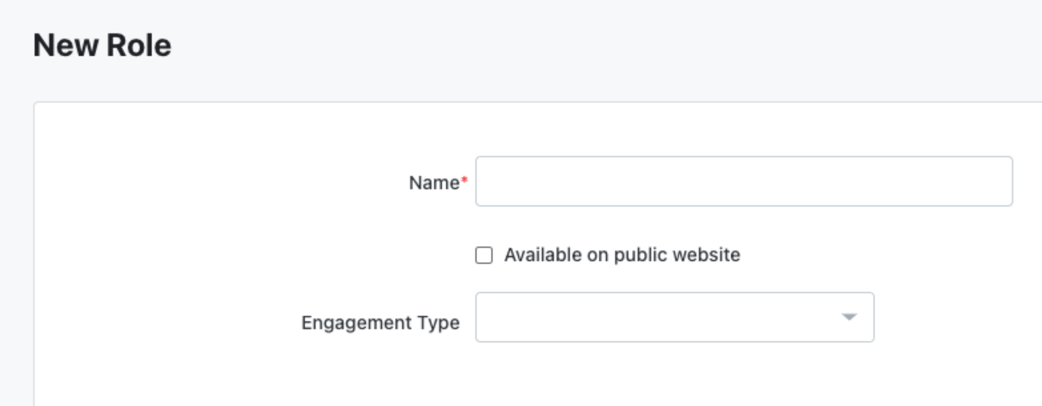
When creating your own Engagement Types, EveryAction only allows application of points to a total in 3 ways:

- Creating/editing an Activist Code
- Addition/editing of an Event Role
- Master Survey Questions

This will be indicated by the Engagement Type in each of these sections upon creation.



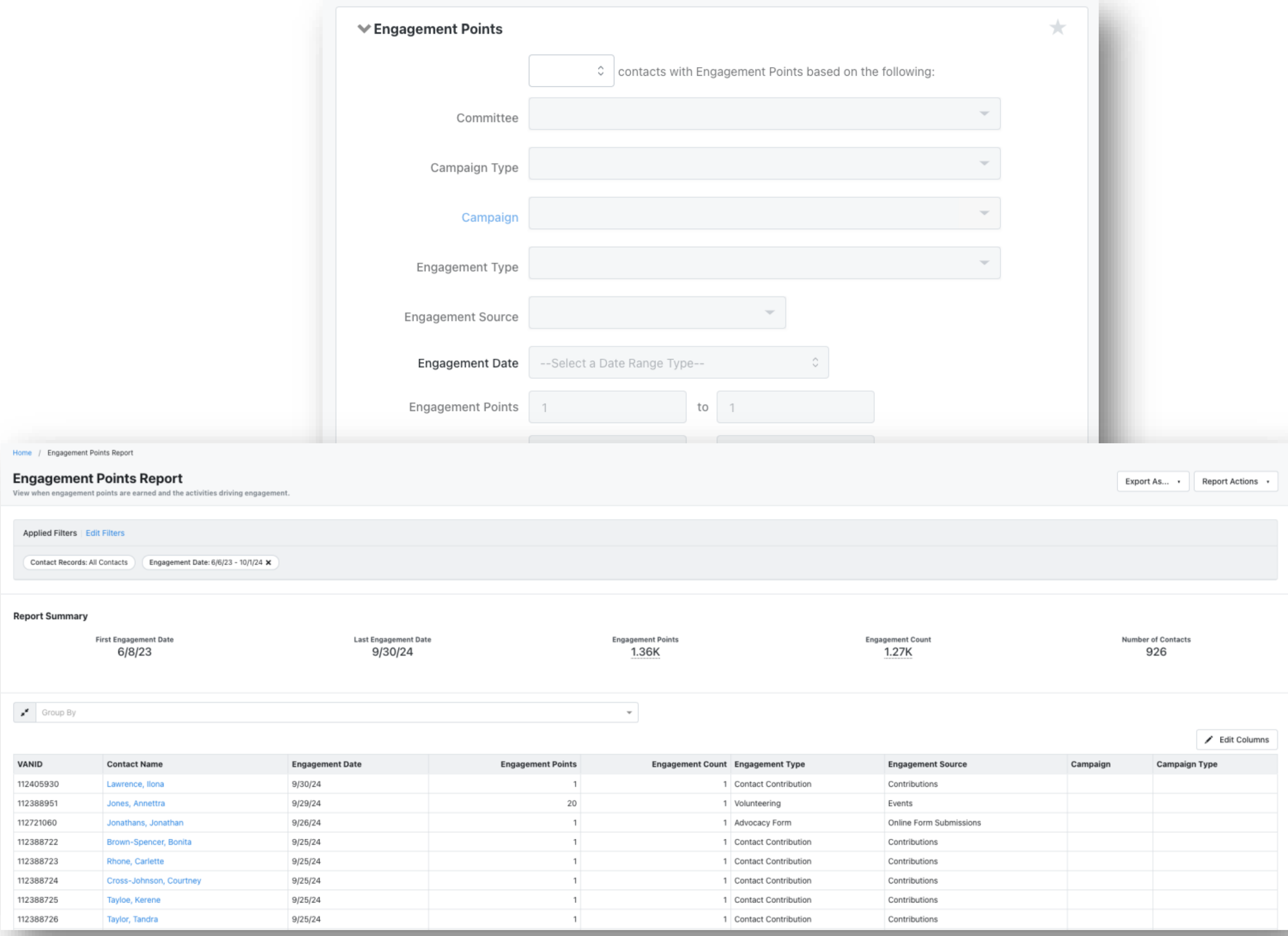




Leveraging Engagement Data

Once your Engagement Points have been tweaked to your preferred specifications, these can be used either directly through the **Engagement Points Report** or through Create A List.

This way, you can ensure that high-tier communications or invitations that need to be sent to your most engaged contacts are ready for quick access.



Additional Resources

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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

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Knowledge Base Articles

- Manage Your Users with User Roles in EveryAction
- User Profiles in EveryAction
- Creating Event Signup Templates
- Engagement Points

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Additional Training

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

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

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Thank You for Attending!

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