MEMBER PORTAL USER GUIDE



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Member Portal

The MEMBER PORTAL landing page

Volunteer Positions Options

- <u>Manage Volunteer Positions</u>
- <u>View Volunteer Applicants</u>

User Settings

Organization Profile

Stats

- Volunteer Positions Stats
- Manage Organization Users
- Add a User
- Manage Notifications
- <u>Update Password</u>

Stats

Volunteer Positions Stats

Site Maintenance Options

<u>Site Pages Editor</u>

Documentation

• Member Portal User Guide



Throughout this website, you will see yellow Help buttons. Click on it for more information about the field it relates to. To close the Help box, click on the X in the upper right-hand corner.

Volunteer Position Options Main Page

Member agencies are expected to create and manage their own position listings; the primary contact/volunteer manager is responsible for position management.

		1 [A	dd an Enti	cy]				<u>SAVE RE</u>	SULTS
		Displaying	Entries 1	to 17 of 17	3	4		5	
Position# ▲▼	Position Title ▲▼	Program/Special Event	Active ^{▲▼}	Updated ▲⊽	Renew	Stats	Preview	Duplicate	Delete
4572	Snow Angels	Snow Angels	-	2022-07-07	C	-	3	ŧ	
4302	Website Manager	Kindness Pledge	-	2022-07-07	C	-	3	ı.	
4299	Volunteer 22Employment (V2E)Youth Series		s,	2022-07-07	C	¢	3	Ð	

**Review your Organization Profile and ensure it is correct regularly

- 1. <u>Add an Entry</u> allows you to create a new position. The form is blank except for your contact information from the organization profile. This information is kept as a default for each posting but can be changed for each position.
- 2. Positions will be listed newest to oldest. <u>To update</u> an existing position, click on its title to be taken to the volunteer position form.
- 3. <u>Renew</u> will reset the six-month 'post until' date and bring it back to the top of the list. a. [Positions are active in the database for up to six months without being edited or reviewed by your organization. After six months they become 'inactive' and must be manually re-activated by your organization]
- 4. <u>Statistics</u> are available to you about the demographics of who viewed your positions and based on what search criteria. Click on the <u>stats</u> icon for viewing history. Sorting the data can be completed by using the [<u>SAVE TO CVS FILE]</u> found at the far right top of the screen. CSV allows data to be transferred in spreadsheet format such as Excel. [Remember: must save as Excel workbook if you edit the ripped data as CVS will not recognize your changes]
- 5. <u>Duplicate</u> will copy the full position entry, allowing you to edit fields and create a similar position that may just need minor changes, such as a different location or desired age bracket.

Position listings are subject to editorial review by PIN. You will be notified if your content requires extensive revisions.

When a search inquiry is conducted from the public side, the results are sorted with the most recently posted position at the top. It is therefore strongly recommended that positions are reviewed regularly.

For positions that don't need any edits, click "Renew" and the position will be updated to the top of list without needing to be reviewed by Volunteer Centre's Team.

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Creating a Volunteer Position

Each volunteer position can be created and edited using the form below. <u>Note:</u> the fields in pink are required fields and must be completed.

Request for Volunteer Form			
Organization Name			
PIN - The People and Information Netw	/ork 💙 *		
Contact	Email		
Phone	Ext		
Address			
Address (second line)			
City	Postal Code		
De et Uneil 2			
De sitie e Manue			
Position Name			
		*	

- 1. The organization's name and the contact information will automatically be listed in the contact fields, based on the information provided in the Organization Profile. These can be changed on a position-specific basis. If another person in the organization is the primary contact, please change the name and email address to reflect the correct contact person.
- 2. Post Until: Positions are active in our database for up to six months without being edited or reviewed by your organization. After six months they become 'inactive' and must be manually re-activated by your organization
- **3.** Position Name: List the position title that matches the position's name. It is not necessary to include that the position is a volunteer position (in other words, please do not mention that the position is volunteer; part-time; or for your organization).

Position Description

	ment 🖗		
Position Description			
Benefits		 	
Working Conditions 🖗		 	

- **1.** <u>Program/Event Name</u>: Describe the department that the position falls under, or list the special event name. This is not a field to duplicate the volunteer position name, and not for your organization name. It is a column on the search results pages.
- 2. <u>Volunteer Impact Statement</u>: This optional field allows you to describe how this volunteer role makes a difference to your organization's mission/the clients you serve. If this is filled out in your Organization Profile, it will auto-populate here.
- 3. Position Description: Information contained here explains the specific tasks involved, skills required/can be acquired, and benefits to the volunteer. The position description should be in simple sentences or bullet points and in plain language. Length should be contained to 5 7 lines (max 1,000 characters) that will attract potential volunteer's attention. Do not paste in a full position description.
- **4.** <u>Working Conditions</u>: List any requirements necessary to perform their role. Examples include: Outdoor vs indoor, must be able to lift 50 lbs., office setting, work from home, unsupervised, flexible options available, etc.
- **5.** <u>Training details</u>: include any activities, dates, and costs associated with training. Example: "Orientation and training will be provided by the organization".

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Skills List

Skill / Experience 🗇		
Leadership []		
 Creative Thinking Decision-Making/Prioritizing Motivate Others 	 Problem Solving Stewardship 	 Strategic Thinking Thought Leadership (Innovation)
Numeracy [_]		
 Calculating Counting 	Estimating	Managing Money
Organizational [<u>-</u>]		
 Analysis Change Management Community Knowledge/Awareness 	 Manage Meetings & Groups Needs Assessment Plan & Co-ordinate 	 Project Management Systems Thinking Time Management
Personal Qualities [<u>-</u>]		
 Accountability Adaptability Continuous Learning 	 Empathy Ethical Framework Flexibility 	 Respect Self-Motivation Sensitivity
Technical [<u>-</u>]		
 Building Constructing 	 Maintaining Equipment Measuring 	Repairing
Technology [<u>-</u>]		
Computer Skills	Process Management	Web Design
Communication [-]		
 Communicate in Plain Language Conflict Resolution Facilitation and Training 	 Interpersonal Communication Public and Media Relations Public Speaking/Presentation Skills 	 Translation Verbal Communication Written Communication
Creative [_]		
 Creating Designing 	InventingPerforming	 Playing Presenting
Finance/Fundrasing [_]		
 Event Management Financial Planning 	Fund Development	Resource Management
Interpersonal [<u>-</u>]		
 Coaching Collaboration 	 Cultural Awareness/Sensitivity Customer Service 	 Supervision Team Building
Skill / Experience Notes		

Check up to three skills a volunteer will use to ensure a better match for the position. This will enable volunteers to more easily find your position based on their search criteria if they search by skills.

<u>Note</u>: these skills align with the National Occupational Classifications, and correlate with the Achieve Ontario certificate program to simplify recognition of volunteers. Use the Help button to learn more about the skill areas.

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1. Check up to three Areas of Interest to tag this position in our database. This will enable volunteers to more easily find your position based on their search criteria. Use the Help button to learn more about the areas of interest.

2. Check the applicable time commitment as required. Check Anytime if the position can be done on a flexible schedule.

Time details

Minimum Duration	Special Event Start Date	t End Date 🕅			
6 months or less 💙 *	3a 4a				
8 months or less	1a and 1b. Indicate relevant time deta for special events.	ils, particul			
8 months or less	2a. From the dropdown menu, choose	e the time			
7 - 12 months More than 1 year Special event	duration of the position. 2b. For a position that has a short, specific start and end dates, choose Special event.				
	3a and 4a. If a position is not a Special leave blank.	l Event,			
	3b and 4b. If a position has specified s end dates, change the Special Event S and Special Event End Date to the dat specified in Time Detail. All dates mus entered in the YYYY-MM-DD format. F example, July 11, 2022 is entered as 2 07-11. Two digits must be used for mo	start and Start Date te St be For 2022- onths and			

lime Detail

Special event: Saturday, January 18 to Sunday January 19 2020 from 9:00 - 6:00 PM. Shifts **1b** are flexible. Special Event Start Date ?Help Special Event End Date Minimum Duration **2b** Special event * * 2020-01-18

3b

2020-01-19 **4b**

Volunteer Details and Accessibility

Min Age	Max Age 🖗	Gender	(Choose one) 🔻
12 *	99 *	choose one 🗸	(Choose one)
Volunteer Categories: 🖗			Gender Neutral Male Female
* An Individual A Group <u>Select All</u>	New CanadiansYouth	 Older Adults Families 	
Accessibility [_]			
 Accessible work space Support Newcomers and English as a second language (ESL) Select All 	 Wheelchair accessible entrance Wheelchair accessible washroom 	 Designated acces space Support voluntee needs 	ssible parking ers with special

1. Age: Indicate the minimum age of the position. The minimum age defaults to 16.

2. Gender: Choose from the dropdown menu.

3. This is a good opportunity for.... Check the box to indicate whether the position is appropriate for an individual, for a group, or for a newcomer; all boxes can be checked.

4. Accessibility: Indicate the accommodations that your organization can provide volunteers by checking the boxes that apply.

Geographical Areas



1. <u>Location</u>: Check the box(es) to indicate the location of the position. Only check boxes of the city the position is in.

2. <u>Address of the Position</u>: Type in the address of the volunteer position. If the position could take place in multiple locations, indicate that in the position address field. If the position has no fixed location, you do not have to indicate a location.

3. <u>Mapping your Position</u>: When typing the address in the address bar, click the address that populates from the dropdown and it will place the red marker on the map for you.

4. <u>Transportation</u>: Using the dropdown menu, indicate the transportation required. Choose Car required only if a car is required for the position (such as a driving volunteer); otherwise, choose either Not on a bus route or On a bus route.

Sharing Your Positions

Additional Sharing Information		
Number of Positions	Police Record Check Required	References required
1		
Vulnerable Sector Check required	Driver Abstract	COVID-19 Vaccinations required
Annual Flu Shot Required	2 Step TB Test Required	

<u>Additional Information</u>: Indicate how many volunteers are needed for this position, and check the boxes for a required Police Records Check, if references are required, vulnerable sector check required, drivers abstract, Covid-19 Vaccination required, annual flu shot required as well as 2 step TB required.

This information is not public on the volunteer centre position database's listings; however, we can view this information when we meet with clients.

Application and Status Information

Application Options 🕅	
Application Link	(8MB max)
Position Status information	Choose File No file chosen
Active *	
Inactive	Add

- **1.** <u>Application Options</u>: To better support prospective volunteers in the application process, you are able to add the link to the page on your organization's website that has more information about the position or how to apply.
 - You can also include the application directly by uploading a file (word or pdf). On the public position listing, this file becomes a downloadable link.
- **2.** <u>Position Status</u>: To activate the position, choose Active in the dropdown menu. To inactivate the position, choose Inactive. This will immediately remove the position listing from the online database, but is still accessible in your portal.
- **3.** <u>Click Add</u> to create the position. Click Update to update a previously added position. The position will go into a queue for editorial review and will not be made live immediately.

NOTE: If you click Add to update an existing position, you will duplicate the position listing.

View Your Volunteer Position

About the Posit	ion
Position #	Shar
Position #	4372 PIN – The Beenle and Information Naturals
Desition	
Location	Show Angels
Impact Statement	Resident are able to be healthy, safe, connected to community and continue to live longer in their own homes.
Description	Volunteers shovel snow (including the accumulation of snow left at the end of driveways when the streets are plowed) following a heat snowfall for senior and/or individuals living with a physical disability.
Training Details	Orientation ; Training is provided ; Orientation and training is provided by the Program Coordinator.
Minimum Duration	6 months or less
Timing	Anytime
Time Detail	Volunteers have 24 hours to clear the windrow following the end of a significant snowfall, defined by the City of Guelph to be 10 cm accumulation.
Age	14+
Ideal for	An Individual, A Group, New Canadians , Youth
Transportation	Car required
Area(s) of Interest	Maintenance/Trades, Senior Services
Skill(s)	Interpersonal Communication, Time Management, Decision-Making/Prioritizing, Self-Motivation
How to Apply	
Website	http://PINnetwork.ca
Application Link:	Apply Now
Email	<u>Send an Email Message</u>
Contact	Emily Vincent
Phone	519-822-1155
Address	

[Above is public search view of volunteer positions]

1. Position field: When you fill in the "Program/Special Event Name" field it will show up on the position line separated by a "-".

- 2. <u>Application Link</u>: When prospective volunteers click "Apply Now" 2 options are available
 - If you do not provide an application link, the volunteer will log in or create a volunteer profile on this portal. Their profile information will be sent to you when they click 'Apply Now'.
 - You may also place to link to an online application or the volunteer section of your organization's website.
- 3. <u>Application File</u>: the organization can upload a volunteer description file.

4. When a prospective volunteer clicks on <u>Send an Email Message</u>, a simple form appears where they are able to send an email to you directly from our site. The email message will be sent to the email address in the position listings, so please ensure that a correct, active email address is listed.

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NEW Volunteer Profile

Create a User ID					
Username 🕅					
PINvolunteers *					
Password 🕅					
*					
(Confirm)					
Show Password					
Contact Information			<i>x</i>		
First Name					
*					
Last Name					
*					
Address 🕲					
City/Town					
*					
Postal Code					
Province					
Province					
Alberta					
Preferred Method of Communication					
•					
 Email 					
O Phone					
E-mail address			Upload Vo	Unload Your Resum	Unload Your Resume
*		0	opidad Tot	opioau rour resum	Opioau rour Resume
Phone		(8	(8MB max)	(8MB max) Choose Fi	(8MB max) Choose File No file
		I	I	1	I

Some additional fields for prospective volunteers have been added when applying to volunteer positions directly from our website. They are able to create a profile on the website, "bookmark" searches, set up notifications for desired volunteer opportunities, and can submit their volunteer stories on our "Share Your Experience" page. The details of their profile will be sent to your organization upon application.

Volunteers can also add their resume to the volunteer profile.

[Allow contacting for survey – this field is to allow the PIN team to follow-up with prospective volunteers for feedback]

Volunteers can add a short paragraph to their profile that will be sent to your organization upon application. They will also be able to edit that paragraph before applying.

View Volunteer Applicants

This new feature allows you to see the volunteer applicants for all of your positions – when people use the "Apply Now" button on our website and there is no external form from your organization attached.

If you have included your own application form in that field volunteers will be led directly to your source.

	Displaying Entrie	s 1 to 1 of 1		1
Applicant Name 🍑	Position Title △ [▼]	Email	Phone DateAdded ** De	tails
Kim Cusimano	Assistant Volunteerism Ambassador	jk	2022-07-07	0

This is the main view for volunteer applicants for all your positions. You can use the up and down arrows to sort the applicants.

<u>Volunteer Details</u>. If you wish to learn more about a specific applicant, simply click the magnifying glass under "Volunteer Details". Then you can access full details along with the resume and short paragraph they may have included.

Name	Kim Cusimano
Email	jkc.oz@sympatico.ca
City	Gueipii
Volunteer Objective	To gain work experience
Volunteered before	Yes, many times
Notes	This is a test Kim Cusimano

Membership Options

Organization Profile

Members Administration				
<u>Return to listing</u>				
Organization Name				Organization Logo
PIN - The People and Information Network]*	1	Replace File: (JPG, PNG, GIF; 8MB max) Choose File No file chosen (Existing file: <u>PIN_Logo_L_RGB_HR.png</u> - Delete?)
Street Address				Address (PO box, Suite#, Unit#)
55 Wyndham St N]		Suite 4A
City	Province			Postal Code
Guelph *	ON		*	N1H 7T8
Phone	Ext			Toll Free
519-822-0912 *]	1-866-693-3318
Fax	Website			
	http://PINnetwork.	са		
Contacts				
Executive Director	ED Email			
Kim Cusimano	kim@PINnetwork.	са]	
Volunteer Contact	VC Email			
Emily Vincent *	emily@PINnetwor	k.ca	*	

1. Upload a banner or logo to be featured on your organization's unique page View 'Trusted Clothes' example or Jump to view Organization Banner Profile

Changes to your organization details

Your contact information can be updated directly via your organization profile. Simply enter changes, and click Update to save.

Member organizations can also notify PIN of changes to the organization's name, address, primary contact, and the information asked for in the above form. Do not use private contact information; list only information that is public and can be shared when referrals are made.

Organization Profile

Impact Statement 🕅

PIN connects people, ideas and information through volunteerism and capacity building leadership.

Short Description of Organization 🖗

PIN	is	your	local	resou	rce for	volunteer	rism a	nd nonpr	ofit	leade	ership			
We	seek	to	inspire	e and	create a	a conduit	to be	longing,	spar	rking	civic	action,	building	social
cap	ital	. and	volunt	eeris	m while	fostering	g and	accelera	ting	capac	ity b	uilding 3	leadership	

Agency Category

Social Services 💙 *

Social Media Links (if applicable)

f Facebook	
https://www.facebook.com/PINnetworkGW	
y Twitter	
https://twitter.com/PINnetworkGW	
in LinkedIn	
https://ca.linkedin.com/company/pinnetworkgw	
@ Instagram	
https://www.instagram.com/pinnetworkgw/	
YouTube	
https://www.youtube.com/user/VolunteerGW/featured	
Charitable Number	
868950015RR0001	
Update	

1. <u>Volunteer Impact Statement</u>: This statement will be automatically included on each volunteer posting but can be edited as well. Describe how volunteers make a difference to the organization's mission and the clients it serves. Example: PIN connects people, ideas and information through volunteerism and capacity building leadership.

<u>Description of Organization</u>: This will be inserted in your organization Banner Profile.
 Example: PIN is your local resource for volunteerism and nonprofit leadership.
 We seek to inspire and create a conduit to belonging, sparking civic action, building social capital and volunteerism while fostering and accelerating capacity building leadership.



PIN - The People and Information Network



PIN is your local resource for volunteerism and nonprofit leadership. We seek to inspire and create a conduit to belonging, sparking civic action, building social capital and volunteerism while fostering and accelerating capacity building leadership.

Position	Program/Special Event	Bookmark	View Detail
<u>Website Manager</u>	Kindness Pledge	*	≣
Volunteer 2 Employment (V2E) Youth Series		*	≣
<u> Kindness Pledge – Social Media Director</u>		*	≣
Assistant Volunteerism Ambassador		*	≣

Each organization has a Banner Profile page

<u>Logo/Banner</u> – The logo you have uploaded to your organization profile will be used as a banner. If you submit a 'banner' in your organization profile, that is what will show at the top. The banner can be a long image with your logo and pictures of volunteers for example.



a. <u>Banner Example</u>:

- 1. <u>Organization Name, Website, & Impact Statement</u>- All these details are gathered from your organization profile
- 2. <u>Available Positions</u> A list of your active volunteer opportunities will pop up Program/Special Event - Name is the 2nd column
- 3.<u>Bookmark</u> Volunteers who have created profiles are able to bookmark the positions they like and review them at a later time
- 4. View detail Leads the volunteer to your position

Update Password

Edit your Userid information	
Password 🖗	
*	
(Confirm)	
Show Password	
First Name	
Last Name	
E-mail address	
*	
Results per page: 50 V	
	Jpdate

Your password can be changed using the Update Password menu option. Type in the new password in the first field, and retype it in the second field to confirm. Minimum of 7 characters is required with no maximum length. Passwords can only be composed of letters and numbers (no spaces or punctuation). Click Update for the new password to immediately take effect.

Record your member portal user name and password in a secure place.

It is recommended that the password is changed each time a staff person, who had access to this password information, departs from your organization.

Total Search Number for the Organization

Displaying Entries 1 to 3 of 3

Position # **	Position Title 🔺	Search Count ▲⊽	Last Updated ▲▼
4300	Assistant Volunteerism Ambassador	6	2022-07-04
4302	Website Manager	4	2022-07-07
4301	Kindness Pledge – Social Media Director	2	2022-07-07

Search Stats for the Volunteer Positions						
You can customize your sea	rch by checking boxes below.					
Duration: whole data set						
Total Number of Data: 0						
Gender	Age					
Gender Neutral	□ 13-18	□ 4 5-54				
Male	19-24	55-64				
Female	25-34	65+				
	35-44					
	Select All					
Year						
□ 2020	□ 2021	□ 2022				
Select All						
	Search					

Statistics are a valuable resource for volunteer organizations. Learn more about <u>who</u> is searching your positions and <u>what</u> areas of Interest these volunteers have.

Statistics can be downloaded in a CVS file.

[<u>Remember</u>: If you download data into a CVS file, when you save your changes you MUST save it as an Excel Workbook or your changes won't be saved.]

Notifications

```
Volunteer Positions Options

    Manage Volunteer Positions

    <u>View Volunteer Applicants</u>

    User Settings

    Organization Profile

    Stats

    Volunteer Positions Stats

       • Manage Organization Users
       • Add a User

    Manage Notifications

    <u>Update Password</u>

    Stats

    Volunteer Positions Stats

    Site Maintenance Options
       • Site Pages Editor
    Documentation
```

Member Portal User Guide

1. Notifications can be managed and accessed through the "Manage Notifications" tab on the main home page.

Notifications

Welcome to the notification service. This system can automatically send you email notifications of new and updated information that matches your search criteria.

The following options are available for maintaining your email notification requests:

- Add a New Notification
- <u>Check Existing Notifications for New Information</u>
- <u>Update Existing Notifications</u>
- <u>Remove Existing Notifications</u>
- <u>Change My Email Address</u>

If you would like to know more about the notification service and the available options, please refer to the <u>instructions for use</u>.

From this page you can manage notification requests - either to add a new notification or to update your e-mail address or an existing notification request.

<u>Add a New Notification</u>: This option allows you to create a new notification. If more than type of notification is available, start off by choosing the desired type. Then fill out the form specifying your search criteria and your delivery options, and the notification will be registered in the system.

<u>Check Existing Notifications for New Information</u>: This displays a list of all the notifications that you have created. From here you can select a specific notification and see if there are has been any new/updated information since the last time the system notified you. If you are receiving frequent (i.e. daily) notifications, the resulting list could quite possibly be empty since there may be no new information since the last time the system notified you. If there are new results, they will be displayed as well as be sent to you via email.

<u>Update Existing Notifications</u>: This also displays a list of all the notifications that you have reated. From here you can select a specific notification that you would like to modify/update. You can update your search criteria as well as your delivery options. The form for the selected notification will be displayed allowing you to make any modifications, and when it is submitted the selected notification will be updated with your new options.

<u>Remove Existing Notifications</u>: Once again, this will display a list of all the notifications that you have created. Unwanted notifications can then be selected and deleted.

<u>Change My Email Address</u>: Here you can change the email address that is registered with the notification system. Please note that after a change of email address, you will be required to reactivate the notification service.