E-Volunteer | The Basics for Agencies
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**Important**

If you have a login for e-Pledge to access your payout or campaign information, that login information is separate from your volunteer account due to its access to sensitive information.

**Additional Help**

If you need further assistance than this guide can provide, contact the United Way of York County Volunteer Coordinator

**Bryce Kruger**

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Creating an Agency Account
Creating an Agency Account

Step 1
yorkpa.unitedwayepledge.org/Volunteer/VolHome.jsp

Step 2
Click on “Agency Application”

Step 3
Fill out and submit the agency application

Note
Please allow a minimum of 24 hours for your application to be processed. Once your agency has been approved, you will receive an email with your account information and a link to your volunteer administrator home page.
Setting up Your Agency Page

Initial Account Set Up
Once you have received your agency account it is important that you finish setting up your account by entering any necessary information. The three primary sections that require attention are listed below.

• Agency Information
• Agency Description
• Agency Contacts

Tip
If you don’t already have these items, now is a great time to create them!
Agency Information

The agency information section includes important details such as your organization’s address, contact information, and logo. There is also a section where you can enter alternative names for your organization.

*Important*

Your agency address should be your physical mailing address. Also, changing your address here will change your address in our database.
Agency Description

Your agency profile allows you to have three different descriptions associated with your account: General, Mission Statement, and Volunteer. It is recommended that you enter a description for each of these fields.

Example

**General Description** - Bryce’s Test Agency was founded in 2020 because it was a way for him to understand the new database. Now, it’s being used to train other nonprofit agencies.

**Mission Statement** – Bryce’s Test Agency aims to connect nonprofits that have volunteer needs to capable and willing volunteers in the community.

**Volunteer** – Our primary volunteer needs consist of finding individuals that are willing to connect nonprofits with volunteer groups of 15 or more.
Account Set Up - Contacts

Agency Contacts
The contacts section of your profile should include the volunteer coordinator/contact of your organization. The contacts that you add here will be linked to the volunteer opportunities that you create later on.

Tip
It is recommended that you have a minimum of two contacts listed for your agency at all times.

Pro Tip
It is not recommended to list your Executive Director as a contact unless they deal directly with coordinating volunteers.
Adding Volunteer Opportunities
Adding an Opportunity

Agency Opportunities
Adding volunteer opportunities to your agency profile is the primary function and use of the e-Volunteer website. You can add and customize opportunities that fit your specific needs as well as track your volunteer responses. The following slides will walk you through the process of creating a volunteer opportunity.

Tip
1. Be specific and provide as much information as possible in your opportunity descriptions
2. Add time slots to your opportunity if you would like to have different shifts available to volunteers

Pro Tip
Make sure that you change the status of your opportunity to “Publish”
Adding an Opportunity - Form
Adding an Opportunity - Form

### Final Step
As you can see, the opportunity form is an in-depth process. Once you have entered all of the required information for your opportunity, click “Add” which will take you to the next prompt.
Opportunity Status

When you create a new opportunity, it is imperative that you change the opportunity status to “publish” if you want your need to be visible to volunteers. To the right are the opportunity statuses available to you and their function.

Important
When you create an opportunity, its default status will be set to “open”. Be sure to change this to “publish” if you want your opportunity to be visible.

Tip
Whenever you edit an opportunity, the system will return the opportunity status to “open”. If you want your opportunity to remain published, change the status to “publish”.

Publish – Makes the opportunity visible to volunteers and visitors to the website. Should always be used if the opportunity is to be viewed.

Open – The default status. Allows user to edit opportunity but is not visible to volunteers. Should be used for draft or inactive opportunities.

Closed – Deactivates opportunity, disables user from changing status or making future edits. Should be treated as a “delete” button.

Expired - Deactivates opportunity, disables user from changing status or making future edits. Should be treated as a “delete” button.

Cancelled – Deactivates opportunity and removes it from “agency opportunity” search log. Should only be used to “permanently delete” an opportunity.
Opportunity Time Slots

Once you have created an opportunity, you will be given the option to add “Time Slots”. This is simply another way of saying shifts, which volunteers can sign up for.

Example
If your opportunity runs from 12pm – 4pm you may choose to add two shifts for your volunteers to sign up for.

**Shift #1:** 12:00pm – 2:00pm
**Shift #2:** 2:00 pm – 4:00pm

Tip
You can add shifts to your opportunity at any time, but it is recommended that you do so when initially creating your opportunity.
Opportunity List

Once you have created an opportunity, it will be listed under the “Agency Opportunities” section of your profile. Here you can view, edit, and maintain your opportunity as seen below.

**Tip**
You can dictate which of your opportunities that you would like to view by selecting the “status checkboxes” listed directly under “Opportunities”.

**Pro Tip**
If you have not selected the “Publish” status when creating your opportunity, it will automatically be assigned the “Open Status”
Opportunity Maintenance

Opportunity Maintenance Items
Maintaining each of your volunteer opportunities is essential to connecting with prospective volunteers as well as developing an active volunteer base. When viewing your agency opportunities, you will see a set of buttons that allow you to alter each opportunity individually. These buttons are listed below.

Tip
You will likely find most use of the copy, Time Slot, and Volunteer List buttons.

Pro Tip
If you have two occurrences of the same opportunity that take place on different dates, use the copy tool to duplicate the opportunity, then change the date occurrence of the copy.

Copy
Used to copy/duplicate an opportunity

Private to Account
Used to make an opportunity private to an individual or organizational account

Time Slot
Used to edit the time slots/shifts that an opportunity has

Volunteer List
A list of the volunteers who have responded to your opportunity

View History
A report that shows how many people have viewed your opportunity over a given time

Link
A link that can be shared as a direct link to your opportunity
Opportunity Responses

To view a list of volunteers that have responded to your opportunity, click the “volunteer list” button on the opportunity you are viewing. From here you can see the following:

- Who has responded
- Any shared volunteer contact information

You can also take the following actions:

- Accept/reject volunteer responses
- Email current respondents
- Manually enter a volunteer response

Tip
You will receive a notification when a volunteer responds to your opportunity. You must accept or reject their response.
Searching for Volunteer Opportunities
Opportunity Search

Volunteers can find your opportunities in multiple ways, the primary of which include via the opportunity search, the opportunity calendar, or if they are referred via a direct link. The opportunity search is the primary method by which volunteers can easily find your volunteer opportunity.

Tip
Provide as much detail as possible in your opportunity description as to inform potential volunteers what is available to them.

Pro Tip
If your opportunity status is “Open” it will not appear in the opportunity search. The opportunity status must be set to “publish” for this to occur.
Opportunity Calendar

The opportunity calendar is simply a calendar that lists all of the published volunteer opportunities on the website. This is another way for volunteers to view and find your opportunity, and is why it is important to input as much information as possible when creating your opportunity.

Tip
The opportunity calendar is based off of the occurrence date of your opportunity.

Pro Tip
The opportunities published on the volunteer website are often directly shared with potential volunteers and interested groups.
Agency Search

The agency search is similar to the opportunity search in that volunteers can use it to find your organization. Again this stresses the importance of having your agency information completed and up-to-date so that volunteers have access to the most relevant information regarding your organization.

**Important**

In its current development, the website requires an agency to have a published volunteer opportunity to show up in the agency search.

**Tip**

It is recommended that your organization has updated descriptions and a published opportunity at all times.
Community Event Calendar
The community event calendar is a calendar in which nonprofits can submit their community and volunteer related events to be published on. If an agency has an event that coincides with a volunteer opportunity, the United Way Volunteer Coordinator can work to link them together if notified.

Tip
It’s best to submit your event information a few weeks in advance of the event itself to allow time for approval and exposure.

Pro Tip
The events listed on the volunteer website are often featured in the Volunteer Center’s monthly newsletter.
Event Calendar Submission

In order to have your event published on the event calendar, the event submission form needs to be completed and then approved by the United Way Volunteer Coordinator. Please allow a minimum of 24 hours for event submissions to be reviewed and approved.

*Tip*
Your event submission should provide as much details as possible for potential attendees and volunteers to be adequately informed.

*Pro Tip*
You do not need to have an agency account to submit an event, but having one allows your event to be linked to your agency page.