CUVolunteer

Cornell University

The Nuts and Bolts of CWVolunteer

Under the hood... easy!

The Nuts and Bolts of CUVolunteer

The Community Administrator has access to more elements of CUVolunteer than a general user. This guide will help you manage your community in areas such as volunteer opportunities, nominations and pipeline, and Done-in-a-Day. If you want to create a community, please contact ovp@cornell.edu.

YOUR COMMUNITY PAGE

The community page (About Us) provides you with the opportunity to share information about your community—as much or as little as you like. You can provide important information about the community, share the website link, and give potential volunteers a name to contact for more information. The community page can be viewed by all users.

Edit Your Community Page

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Edit**.
6. Make your changes, then **Submit**.

> TIP: Once you upload a logo and/or banner, you cannot remove it, you can only replace it.

Upload Community Members

There are many advantages to populating your community with members. Members are able to e-mail each other and access documents the community administrator has uploaded, such as meeting minutes, agendas, strategic planning documents, etc.

Community members are NOT able to edit the About Us page, position descriptions, etc. Only community administrators are able to do this.

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities.**
5. Click **Admin** at upper left.
6. Under **Manage Members,** click **Add Members.**
7. To add an individual member, enter first and last name in the name field. If the name appears in a drop-down list as you begin to type, select it. The e-mail and NetID will then automatically be filled in. Click **Add**.

If the name does not appear in a drop-down list when you begin to type, the person has not yet created a profile. You may still add their name and NetID, however; the system will generate an e-mail inviting them to create a profile and become a member of your community.

8. To add a group of names, click **Upload CSV** on right. An information window appears showing the advised format. Click Browse to locate your CSV, then Upload.

Appoint Other Community Administrators

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities.**
5. Click on **Admin** at left.
6. Under **Manage Members**, click on **Administrators**.
7. Type in the member name and select it from the drop-down list.
8. Click **Add**.

Upload Community Documents

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click on **Documents** at left.
6. In **Title** field, enter document name.
7. Click on **Choose File** to locate document.
8. Click on your chosen document, which returns you to CUVolunteer.
9. Click **Upload**.
10. Documents are listed in alphabetical order.

Send Messages to Community Members

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Members** on left.
6. Find name using **Search Members** field, or click on the member's name in the list shown.
7. Click **Message** on right.
8. Compose message and **Send**.

Managing Opportunities (Positions) within Your Community

When you are developing your community in CUVolunteer, you will want to enter all of the current community opportunities, or positions, so all volunteers are aware of them. Completing and maintaining a list of the community opportunities is important because:

- A thoughtful, descriptive list allows for consistent expectations and provides up-to-date information.
- A current list provides transparency about availability, position expectations, requirements, and roles.
- A list of community opportunities provides potential volunteers the opportunity to see what skills and experience they need to be a candidate for a position.
- A list of community opportunities allows volunteers to nominate themselves or others to participate.

Create a Position Description

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click **Create a Position**. (Be careful not to select "Create an Opportunity.")

7. Answer all questions, then click **Next**.
8. Fill in the position attributes: Cornell Interests, Skills, and Experience.
9. Click **Draft** on right and choose **Approved** from the drop-down menu.

TIP: Want to review all of the options before you begin to enter information? See the worksheet in our Toolbox on the Cornell Volunteers! website.

Edit a Position Description

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click on **Manage Positions**.
7. Select the position you want to edit.
8. Click on **Administrative Actions**, then choose **Edit Position**.
9. Make the necessary changes as you review each page.
10. Click **Submit**.

TIP: You cannot skip to the page that you are updating. You need to start from the first page. If you have no changes on a page, just click "Next" until you get to the page you need to edit.

Copy a Position Description

The copy feature is a lifesaver. You may have multiple opportunities in your community with similar descriptions. For example, chairs or committee members often have very similar position descriptions regardless of which committee and volunteer opportunity they represent. The copy function means you can quickly and easily populate all of your opportunities.

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click **Manage Positions**.
7. Select the position you want to copy.
8. Click **Administrative Actions** at right and choose **Copy Position**.
9. Select the community you want to copy into and click **Copy**.
10. Answer all questions, then click **Finish**.
11. Click **Draft** (on right) and then choose **Approved** from the drop-down menu.

TIP: Only Super Administrators are able to copy position descriptions from another community. E-mail ovp@cornell.edu and we'll be happy to copy it to your community for editing.

Download a Position Description

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click **Manage Positions**.
7. Select the position you want to download.
8. Click and hold on **Administrative Actions**, then choose **Save Position as PDF**.
9. Right click and select **Save As**.
10. Rename if you choose, and save the position description to your computer.

TIP: Click the back arrow in your browser to return to the CUVolunteer site. Don't close the document; it will close you out of the system.

Link a Volunteer to a Position

After a community administrator populates the community with a list of its members, the next step is to link the leaders' names to their relevant positions. This is called "slating a volunteer into their role." Follow these steps to link your volunteer leaders to their current positions in your community:

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Volunteer** on left.
6. Locate and click on the position you want to link the volunteer to.
7. Click **Administrative Actions** on right.
8. Select **Manage Candidates**.
9. Click on **Add Candidate.**
10. Select the appropriate nomination year. For example, choose 2016-17 if the term starts in 2017. Choose 2015-16 if the term starts in 2016.
11. Enter volunteer's name (choose from drop-down list if name appears; NetID will be auto-entered) and NetID. Next, enter your name (again, choose from drop-down list even though you are not a nominator) and answer question(s): enter "currently serving" in each field.
12. The message "nomination saved" will appear at the top of the screen. The volunteer's name will be reflected in the Internal Recommendations table.

13. Click **Slate** in the Slate Action column.

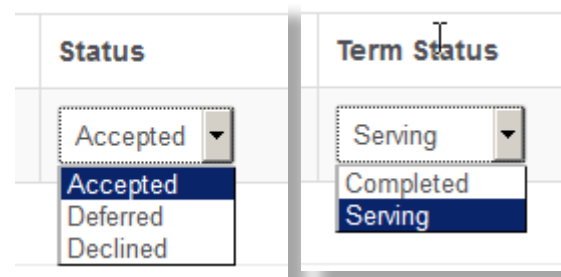The volunteer's name will move into the Slate of Candidates table.

14. Click **Keep** in the Actions column.
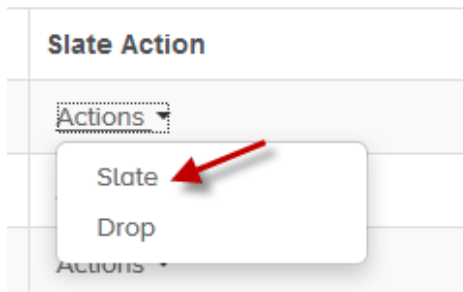
The volunteer's name will move into the Invited Candidates table.
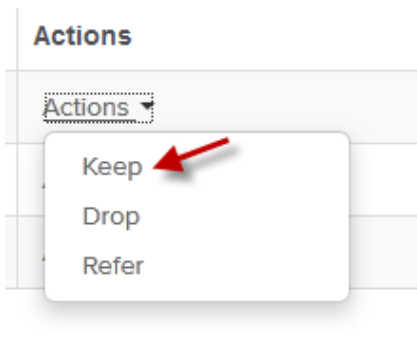
15. Click **Accepted** under the Status column.
16. Click **Serving** under the Term Status column.

17. Add the relevant term dates.
18. Remember to return to this page when the volunteer's term ends and change the Term Status to COMPLETED. This step is necessary for the volunteer role to move from Current Activity to Past Activity on his/her Impact page.

FAQ: Position Descriptions

Q: Will I be notified when someone is interested in one of my positions?

There is not an "I'm Interested" button, however every position lists the responsible staff member's contact information.

Manage Done-in-a-Day Opportunities

Done-in-a-Day Opportunities (DIAD) are one-off volunteer opportunities that your community holds annually, occasionally, or just once. You can now create these great engagement opportunities in one place and put out a call for help to all Cornell volunteers. CUVolunteer also manages your sign-up process so you can recruit additional help.

Check out the CUVolunteer tutorial on the Cornell Volunteers! website for help in creating a DIAD opportunity.

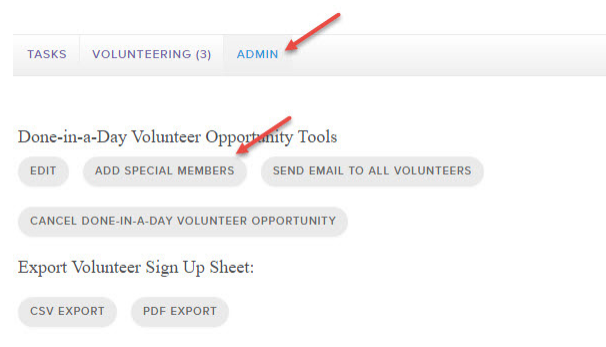### Create a Done-in-a-Day Opportunity

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In**.
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click on **Create a Done-in-a-Day Opportunity**. (Be careful not to choose "Create a Position.")
7. Answer all questions, including whether the opportunity is private or open, and then click **Create**.

> *TIP: An "open" opportunity is visible and open to all CUVolunteer users. A "private" opportunity is visible and open only to members of your community. You can choose to invite individuals who are not members of your community. Hint: Leave your Done-in-a-Day in draft status until you have finished creating your tasks and adding any special invitations.*

8. Click **Add a Task**.
9. Enter task information and **Save**.

> *TIP: Create tasks based on a timeframe. For example, one task could be Registration Table, 3-5pm. The next task could be Registration Table, 5-7pm. Tasks should not be more than 2 hours long.*

10. To invite non-community members to the DIAD, click on the **Admin** link, then on **Add Special Members**.

Edit a Done-in-a-Day Opportunity

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In.**
4. Click on the name of your community on the right, under **Your Communities**.
5. Click **Admin** on left.
6. Click **Manage Done-in-a-Day Opportunities.**
7. Identify the opportunity and click **Edit** at right. You can edit the event details and/or the tasks.
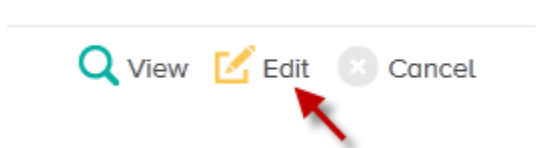
8. To cancel the DIAD, click **Cancel**. A window opens allowing you to send a message to the participants explaining the reason for the cancellation.
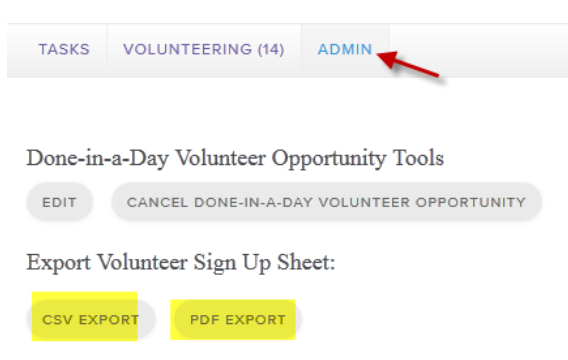

9. Click **Save.**

FAQ: Done-in-a-Day Opportunities

Q: Can I send a group message to everyone who signed up for my opportunity?

Yes! Click **Admin** on the grey bar in the middle of the page, then click the **CSV** or **PDF** export button that appears below it to get a list of all who have signed up. Use that data to send an e-mail from your own mailbox.

Q: How will I know when someone signs up for my opportunity?

When someone signs up for a Done-in-a-Day Opportunity, all community administrators are notified via e-mail.

Q: Will I be notified when someone opts out of a task they had signed up for?

No, you will need to go into the Done-in-A-Day Opportunity on a regular basis and check the list of current volunteers.

Q: Will I be sent a status update as the opportunity approaches telling me how many volunteers have signed up?

To find out the number of people who signed up for your opportunity, go into the opportunity and look at the sign-ups. A reminder for the opportunity will be sent four days prior to the event to all who signed up and to the community administrators.

Q: If the Done-in-A-Day Volunteer Opportunity is for an event, does it also register someone for the event?

The platform is not built to register people for an event. When creating your opportunity, please include the link to the registration database in your description.

How to Manage Nominations for Open Positions

Find Nominations Received

As the volunteer manager for your community, you have administrative access to the **Manage Candidates** tool. When you sign in to CUVolunteer, you will see your communities on the right.

1. Go to www.alumni.cornell.edu/volunteer
2. Click the link for CUVolunteer.
3. Click **Sign In**.
4. Find and click on the community for which you want to view nominations.
5. Click **Volunteer** on the left and select the position for which you want to view nominations.
6. On the right is an **Administrative Actions** drop-down list. Select **Manage Candidates**. You will see the list of nominees in the **Internal Recommendations** table.
7. Click **Export Internal Recommendations** to save the list as an Excel document.
8. Nominators (not nominees, although they may be the same if self-nominated) automatically receive an e-mail confirming receipt of nomination when their nomination is submitted. Follow this with a personalized thank-you e-mail to nominators that includes a timeline of the membership process.

TIP: Community administrators will receive notification of any new nominations (sample below) to their community via an e-mail from CUVolunteer.
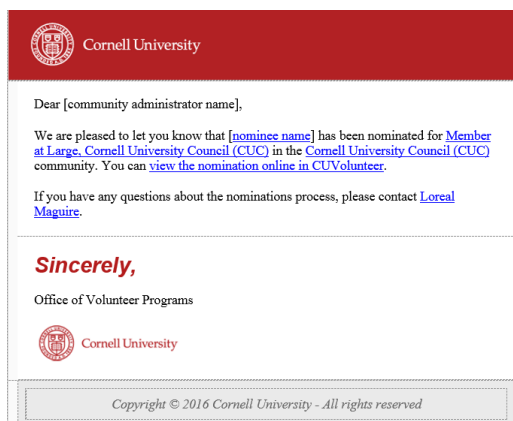
Prior to Review of Nominees

1. If a nominee is tracked, the gift officer receives an e-mail from CUVolunteer when the nomination is submitted. The e-mail provides a link allowing the gift officer to offer an internal recommendation of the candidate: Highly Recommend, Recommend, or Needs Discussion. If you see the word "null" or if you see a NetID, this means that the gift officer has not yet provided a recommendation or has not yet created his/her profile.
2. The volunteer manager then selects a *Slate Action*, which either moves the nominee to the *Slate of Candidates* table for consideration by the nomination committee *or* drops the nominee from consideration.

During Review of Nominees

1. If you have a nominating committee or team, you can provide them with the exported Excel sheet (see *Find Nominations Received*) or PDFs of each nomination for their review.
2. The committee should discuss whether each nominee should be kept (invited to the position), dropped, or referred to another volunteer position. This is a great opportunity to do so!

TIP: Before referring a nominee, run a report to document the original list of nominees. Once a candidate is referred to another position, his/her name is removed from the original nomination and the nomination form is lost.

TIP: For instructions on how to refer a candidate, see the tutorial Review the Nomination Pool.

After Review of Nominees

1. Once the nominating committee makes a decision about each nominee, the volunteer manager records the actions made (keep, drop, or refer).
2. Those kept will move to the *Invited Candidates* table. This is the point at which all final nominees are invited. Once they accept, defer, or decline, the volunteer manager should record the *Status* and *the Term Start and End Dates* in the table and then notify each nominator of their nominee's status.