



VOLUNTEER NOW'S

# VOLUNTEER MANAGEMENT PLATFORM

A step by step guide for groups

Volunteer Now uses the innovative *Be Collective* platform which is a fantastic **FREE** volunteer management system enabling groups to find volunteers, create opportunities, run events, manage people and engage new audiences.

The platform allows you to tailor your own registration forms, assign shifts and communicate with your volunteers, and much more!

It also enables volunteers to keep a verified Social Record of their volunteering at the touch of a button.

We have put together this guide to help you navigate the platform but if you need any assistance or advice along the way, please contact Volunteer Now - all our contact details are [on our website](#).

There is also a comprehensive [help section](#) on the *Be Collective* site.

## Index

You can use as many (or as few!) features on the platform as you wish, but it is essential that your group information is up to date and if adding opportunities that you also then process any volunteer registrations and timesheets.

If at any time you get a bit lost on the *Be Collective* site, use the dashboard panel on the left of your screen to navigate back to your group summary page.

- [Overview of your group summary page](#)
- [Getting Started](#) - register your personal account
  - register your group
  - requesting partnerships
- [Adding your volunteering opportunities](#)
- [Creating a duplicate opportunity](#)
- [Sharing existing volunteering opportunities to Volunteer Now's website](#)
- [Messaging volunteers](#)
- [Scheduling & Rostering feature](#)
- [Adding / removing Administrators to your group account](#)
- [Processing volunteer registrations & volunteer timesheets](#)
- [Recruiting volunteers for large events](#)
- [Reporting options](#)
- [Writing articles of interest to your group members](#)
- [Fundraisers](#)
- [Be Collective Plus+](#)
- [Frequently Asked Questions](#)

# Your Group Summary Page...

The screenshot shows the 'Volunteer Now' group summary page on the Be Collective platform. The page is divided into several sections:

- Header:** Features the hashtag '#HelpEachOther' and the 'VOLUNTEER NOW' logo. A search bar is located at the top right.
- Navigation:** A horizontal menu below the header includes 'Summary' (highlighted), 'Details', 'Members', 'Volunteer activity', 'Opportunities', 'Events', 'Schedule', 'Fundraising', 'Settings', and 'Reports'.
- Overview Section:** Contains three columns: 'Volunteer Activity' (Pending, Active, Past), 'Opportunities' (Available, Full, Empty, Past), and 'Timesheets' (Pending, Approved).
- Actions Section:** Lists 'Pending membership applications' and 'Pending Volunteer applications'.
- Things you can do Section:** Lists 'Create an Event', 'Add volunteer opportunity', and 'Message group'.
- Articles Section:** Features an article titled 'FREE RESOURCES FOR YOUR GROUP' posted on Mar 6th, 2020.
- Left Sidebar:** Includes 'Welcome to...', 'Search', 'Manage my groups', and 'Need help?' sections.
- Right Sidebar:** Contains icons for favourites, activity requests, messages, and a personal profile.

- 1 Your personal dashboard
- 2 Find a group / opportunity / event on *Be Collective*
- 3 Manage your group / event
- 4 *Be Collective* help centre / customer support
- 5 Search bar
- 6 Summary page overview
- 7 Create an article for your group page or edit existing
- 8 Favourites
- 9 Activity / action requests
- 10 Messages
- 11 Your personal profile / log out
- 12 Quick link to add opportunities / events / people
- 13 Edit your group general details / logo / banner
- 14 Actions - outstanding Partnership and Membership requests, volunteer applications
- 15 Things you can do - create an event / opportunity , message your group or invite someone to become a member

# Getting Started

If you're not sure if your organisation is already registered, please contact Volunteer Now and we can check, this will help avoid duplications.

Go to <https://www.volunteernow.co.uk/volunteer-management/> to begin registering your group account.

In the 'account settings' to the right hand side, click on 'register now'

Complete all details in the registration form and submit.

You will be sent a verification email to activate your new account and this will take you in to the *Be Collective* side of the platform.

Note: only one group account needs to be registered. Other members of your team or your volunteers can register an individual account by [visiting this link](#) and then you can either assign them Admin permissions or invite them to join your group page (see page 8 of this guide)

## Once you have logged in...

A short tour of the *Be Collective* site will appear.

Click on 'Profile' (this is your own personal profile and is separate from the details you will add for your group)

- agree to terms and conditions
- add your personal profile picture (optional / needs to be in jpg format)
- update your banner image (optional / upload your own or choose from the gallery)

Add any information you want to add about yourself, skills, experience etc (optional)

**To add your group** – click on 'manage my groups' in the left hand dashboard column, and click '+Add New'

- Add information about what your group does
- Add your main office location
- Add the causes your group supports
- Enter your insurance details (any volunteer opportunities you advertise state whether your group has insurance or not)
- Create an application form for your group - this form is for people to become 'members' of your group and does not need to be very detailed as your opportunities will have a separate registration form where you can ask for details relevant to the volunteering role you are advertising. If you wish, you can select to automatically approve applications so that you don't need to do this manually.
- Upload your logo (your logo needs to be in jpg format)
- Select your page header - you can either choose a picture from the gallery or you can upload your own photo

*For more details on adding your group visit the help centre:*

<https://help.becollective.com/en/article/how-do-i-create-a-group>

*or watch the step-by-step video at <https://help.becollective.com/en/article/video-how-to-create-a-group>*

## Partnerships

You can request a Partnership with any group(s) on *Be Collective* – could they help promote your opportunity or maybe you have a similar interest, client group or set of values?

To see who your group already has partnerships with, go to your group summary page and click on 'Partnerships' in the top tool bar.

If you registered your group through Volunteer Now's website, the platform will have automatically requested partnership with Volunteer Now – this will allow you to easily share your volunteering opportunities to [www.volunteernow.co.uk](http://www.volunteernow.co.uk)

*For more details on Partnerships visit the help centre:*

<https://help.becollective.com/en/article/how-do-i-partner-with-another-organisation>

# Adding your Volunteering Opportunities

Log in to your Be Collective account at <https://www.volunteernow.co.uk/volunteer-management/> and select your group. You can either edit/add your opportunities from Volunteer Now's website, or if you wish to do this from with the Be Collective platform click 'manage opportunities' at the right hand side and then select 'Opportunities' from the header bar on your group summary page. *Note, at any time you can save your opportunity to continue editing at another time, or you can choose confirm at the final step of creating your opportunity. You can also create a duplicate of an existing opportunity if you are advertising the same opportunity in a different location - see next page.*

*If needed you can find a full guide on how to add your opportunities at the help centre: <https://help.becollective.com/en/article/how-do-i-create-an-opportunity>*

## DETAILS

### Title of opportunity:

Use a descriptive, eye-catching title for the opportunity. Avoid generic opportunity titles such as 'Volunteer' or 'Help needed'.

### Overview of the Role

The first few lines will be shown when the volunteer is searching for opportunities and then they will see the rest of the details when they click for more information. Your first few words should be attention grabbing. If your group pays travel / subsistence expenses, provides training, or has any other perks or restrictions, please state in this section. Make sure you explain what the actual volunteer role is!

### List the tasks and responsibilities

This section is also shown in the volunteer's social record.

### Location

Where the opportunity is taking place – make sure you add a location for your opportunity as this is one of the search filters for volunteers.

'Additional location info' – if your location is hard to find, or you want to describe a location, you can add further details in here eg 'Our office is on the first floor just through the double doors'

### Experience Gained

These fields are also shown on the volunteer's social profile. Fields selected should only be relevant to the specific opportunity. These are also used as one of the filters when volunteers are searching for opportunities.

### Is this opportunity suitable for Children under 16

When a young person aged under 16 uses the opportunity search on [www.volunteernow.co.uk](http://www.volunteernow.co.uk) they will only be shown opportunities suitable to them. If your opportunity is suitable for younger volunteers you will be asked what your minimum age is, and if they need to be accompanied by an adult.

### Contact Person

Who is the contact person for this opportunity? (Volunteers can see these contact details if they hover their cursor over the 'contact' when the opportunity is advertised on *Be Collective*)

### Causes

Make sure you add causes as they are also used as one of the search filters. You can add as many as you wish, but they should only be relevant to the specific opportunity.

### Opportunity is suitable for...

Would your opportunity be suitable for large groups, for people with limited English, for wheelchair users, etc? Please have a look and make your selection from the drop down list.

## TYPE

Does this opportunity take place at the same times each week, for an hour or two every week/month or is it a one off activity? You can specify here days/times you need volunteers to help.

Please note, this section calculates volunteer hours in the reporting function of the platform, and the hours tally also shows on the volunteer's own record.

- For more details about shifts visit the help centre: <https://help.becollective.com/en/im-a-volunteer-manager/opportunity-management>
- View more information about Scheduling & Rostering: <https://help.becollective.com/en/article/introducing-scheduling-and-rostering>

## APPLICATION

You can adapt your application form to suit your needs – make sure you don't ask the volunteer for more information than is necessary and that you comply with GDPR at all times.

Automatically approve applications?

You would normally leave this set to no – maybe the only exceptions would be for a large event you are recruiting volunteers for where you don't need to review each individual application.

*For more details about the application form builder visit the help centre:*

<https://help.becollective.com/en/article/how-can-i-customise-my-opportunity-application-form>

## BRIEF

Do you need to send your volunteers information before their volunteer role begins? For example, you can remind them to wear suitable clothing, where your meeting place is, etc,

You can also attach any documents you wish to send to the volunteer – maps, expenses forms, specific role description, etc.

You can only have 1 brief active at a time. If you were having an event and you've already sent out a brief a week before the event but needed to send another maybe the day before it takes place, you can change your brief and change the date to send.

*For more information about volunteer briefs, visit the help centre:*

<https://help.becollective.com/en/article/how-does-the-volunteer-brief-work>

## SHARE

Can everyone on Be Collective apply for this opportunity?

Normally set this to 'yes'. The only time you would click 'no' would be if you want to share your opportunity ONLY with your own group members.

**Endorse** – **Please make sure you tick the box to share with Volunteer Now** so that your opportunity shows up in the opportunity search on [www.volunteernow.co.uk](http://www.volunteernow.co.uk)

If you have set up your account via the link on [www.volunteernow.co.uk](http://www.volunteernow.co.uk), Volunteer Now should show in your list of partners.

If you haven't already partnered with Volunteer Now, go to our [profile page on Be Collective](#), click on the 3 dots to the right hand side and select 'request partnership'.

You can also request partnerships with other groups if you want to share opportunities etc with them.

# Adding a duplicate Volunteering Opportunity

If you have one opportunity that is taking place in several different locations, you will need to create separate opportunities but you don't need to add all the details again, you can create a duplicate opportunity and just change the location for each.

From your group summary page, click on the 'Opportunities' tab (just under your main header image)

Your opportunities will all be listed – click 'duplicate' under the appropriate opportunity, this then saves as a draft opportunity.

Click the 'Drafts/Pending' tab to view your draft opportunities.

The opportunity you've just duplicated will have 'COPY' in the title and 'Draft' in italics beside it.

- Update your opportunity title – remove the word 'copy' and it is useful for your own records if you add in the location of the opportunity
- Update the address the opportunity is taking place
- All other fields will probably remain the same, but you do have the option to change any if needed.

On step 5 of the opportunity make sure you share your opportunity with Volunteer Now

# Sharing an existing opportunity with Volunteer Now

Maybe you have an existing opportunity that you haven't shared with Volunteer Now - your opportunity won't show up on [www.volunteernow.co.uk](http://www.volunteernow.co.uk) until you do.

From your own group summary page, click the 'opportunities' tab and select 'Active'

Under the opportunity title, click 'share' and select 'endorsement request'

Tick 'Volunteer Now' and any of your other partners you wish you share your opportunity with.

Click 'send'

Volunteer Now then receive a notification and, once we have endorsed your opportunity, it will automatically appear on the Opportunity Search on [www.volunteernow.co.uk](http://www.volunteernow.co.uk)

## Messaging

Be Collective has an inbuilt messaging system which makes it easy for you to keep in touch with your Members. When you send a message via this platform, your Members receive an email to let them know you've sent them a message.

### Messaging your group

If you have some news that you want to share with **all** your Members, go to your summary page, and on the 'Things you can do panel' select 'message group'. Please note, any responses received in the group message can be seen by the entire group, so do not hold conversations with individuals in this section - message them separately if needed.

### Messaging an individual in your group

From your summary page, click the 'Members' tab.

Use the search box to find the person you want to message, and just under their name click 'message'. Only yourself and the individual can see this conversation.

### Messaging volunteers relating to a particular opportunity

Maybe you have new guidelines relating to one of your volunteering roles and need to pass it out to those volunteers? You can message all the volunteers accepted to a specific opportunity.

From your summary page, click the 'Opportunities' tab.

Under the opportunity title, you will see the option to 'message' - this will send a message to all volunteers accepted to this role. Again, any responses will be seen by the whole group the message has been sent to.

## Scheduling & Rostering

Scheduling & Rostering is a brilliant feature from Be Collective - access this section by clicking 'schedule' on the toolbar on your summary page.

Within this section you can see calendars for each opportunity, showing shifts that are filled or others that you may still need additional volunteers for. (*dark green shading = shift filled; light green shading = volunteer shifts available*)

You can invite volunteers to an opportunity within this section, assign to particular shifts or change the selection they have made. You can also amend shifts if needed. *Please note, if you amend an existing shift you will need to inform any volunteers who have already registered for it.*

This is such a useful feature within Be Collective and we recommend that you view the help section so that you are getting the best use from it ...

<https://help.becollective.com/en/article/introducing-scheduling-and-rostering>

# Adding / Removing Administrators

You can set as many people up with Administrator permissions for your group as you want.

All Administrators are able to add opportunities to your group page, view and process volunteer registrations, add news stories, etc.

Please note, the person you want to grant admin permissions to, must already have set up their own personal account on *Be Collective* (see the [Getting Started](#) section)

## Invite to join your group

Once they have set up their personal account you need to invite them to join your group - from your summary page, click the 3 dots to the right, select 'invite' and then type in the name of the individual. This will come through to them as a message and then they just click to accept.

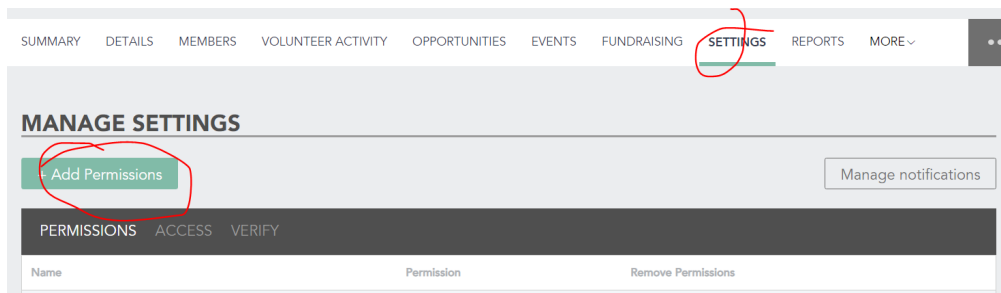
If you prefer to send the invitation by email you need to send them the link to your group page. To get the link, go to your group summary page, click on the 3 dots to the right, and select 'view public profile'. Your web address in the top bar will now end in 'profile'

e.g: <https://uk.becollective.com/groups/5dba678da6aebd002a09a719/profile>

When they have accepted your invitation to join the group, you can now assign them with Admin permissions..

## Assign Permissions

From your group summary page, select 'settings' from the top bar and click 'add permissions'



Type in the name of the group member you want to grant Admin permissions to and then click 'Add Permission'

The named person will then receive an automated email to let them know they now have Admin permissions to your group account.

*For more details about assigning Admin permissions visit the help centre:*  
<https://help.becollective.com/en/article/how-do-i-add-admins>

## Removing Administrators

If someone has left your group or their role has changed, you can withdraw their Admin permissions.

Click on the 'Settings' tab - you will see the list of people with Admin permissions. Click the X beside whoever you want to remove the permissions from.

Please note, the person who initially created your group account will show in this list as the 'owner' - if you need to remove them please contact *Be Collective* using the 'contact customer support' link at the bottom of your screen.



# Processing volunteer registrations

When a potential volunteer registers for an opportunity, Administrators will receive an email notification.

Pending volunteer applications will show on your group summary page in the Actions panel or click on 'Volunteer Management' from the top tool bar on your summary page.

You can see all your new registrations in the 'applications' tab and view their application form. It is useful to keep the 'status' section updated - in here you can select pending / reviewing / background checks / interviewing / pre approved, so you will always know the status of your applications.

When you accept/reject a volunteer, they will receive an automated notification that their application has been accepted or rejected.

*For more details about volunteer registrations visit the help centre:*

<https://help.becollective.com/en/im-a-volunteer-manager/opportunity-management>

## Volunteer Timesheets

Volunteers have their own social profile on the *Be Collective* platform and part of this is a tally of the hours they have contributed, so please make sure you accept volunteers so their hours are counted.

Once you accept a volunteer the platform will want to start counting the hours they have contributed. If you have created your volunteer role with a set amount of hours each week, these will automatically be attributed to the volunteer once you accept them.

You will see on your group summary page any pending timesheets waiting for approval. You can:

- Approve these manually
- Ignore and the platform will automatically submit hours after a period of time
- Amend any volunteer hours if necessary if additional or less hours were volunteered

A tally of volunteer hours contributed will also show in the reporting section on your group summary page.

*For more details about volunteer time sheets visit the help centre:*

<https://help.becollective.com/en/im-a-volunteer-manager/opportunity-management>

## Recruiting Volunteers for Events

Adding events is a great way of grouping multiple opportunities that take place under the same umbrella, like a fun run or festival.

Add any volunteering opportunities relating to your event first as you will then link to them in your event details. You can attach any briefs you need to send to volunteers in the opportunity detail - so for example if you needed to remind them a day or two before the event to wear suitable clothing, where your meeting place is, etc. The platform will automatically send this brief out to volunteers you have accepted to this role on the date you specify.

To add an event, go to your group summary page and from the 'Things you can do' panel, click 'create an event'

- Enter details about your event
- Update your header image - maybe you have a photo from a previous event you'd like to use, or select one from the online gallery
- Link to your event's volunteering opportunities

*For more details about Events visit the help centre:*

<https://help.becollective.com/en/im-a-volunteer-manager/opportunity-management>

# Reporting Options

To see your reporting options, click on the Reporting tab (just below your header image) and this will show your Social Impact Report

- The overview will show you how many volunteers are active within your group and the social impact value (this is calculated on the UK average wage figure)
- Detailed reporting will show your volunteers by gender and by age, and will also show the causes your volunteers are interested in
- *Be Collective Plus* +/- this is not free on the system but is an additional feature where you can download detailed reports about your volunteers - see the [Be Collective Plus+](#) section for more details.

For more information about Reporting visit the help centre:  
<https://help.becollective.com/en/im-a-volunteer-manager/reporting>

# Writing Articles

Do you have any news that you think would be of interest to your Members or to the wider community on *Be Collective*? These articles are seen by visitors to your group public profile and also show up on your Members' personal summary page.

For more information about writing articles visit the help centre:  
<https://help.becollective.com/en/article/how-do-i-create-an-article>

# Fundraising

*(more info to follow)*

# Be Collective Plus+

*Be Collective* is free for everyone to use; however, some additional features are only available on *Be Collective Plus+* (for which a charge is made)

These additional features include:

- **Dynamic reporting** for complex insights in your engagement level and social impact
- **Smart lists:** create custom folders and lists to sort through your volunteers
- **Volunteer Portal:** a white-labelled solution that allows you to fully integrate group creation and opportunity listing onto your own website
- **Create a hierarchy:** join with other branches: share reports and information at each level and sub-level
- **Recognise your volunteers** and mobilise your social engagement with a credit system
- And much more!

For more information about *Be Collective Plus+* visit the help centre:  
<https://help.becollective.com/en/be-collective-plus>

# Frequently Asked Questions

## Where do I log in to my account?

Go to [www.volunteernow.co.uk/volunteer-management](http://www.volunteernow.co.uk/volunteer-management)

## I've forgotten my password

Go to [www.volunteernow.co.uk/volunteer-management](http://www.volunteernow.co.uk/volunteer-management) and click 'I forgot my password'. The system will email you details on how to reset your password

## I would like some 1-1 support on how to use the *Be Collective* platform for my group

[Contact Volunteer Now](#) and we can arrange this for you

## For a full range of help topics, visit the *Be Collective* help centre ...

Opportunity management: <https://help.becollective.com/en/im-a-volunteer-manager/opportunity-management>

Group management: <https://help.becollective.com/en/im-a-volunteer-manager/group-management>

Member management: <https://help.becollective.com/en/im-a-volunteer-manager/member-management>

Reporting: <https://help.becollective.com/en/im-a-volunteer-manager/reporting>

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