

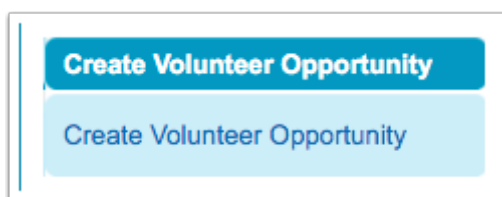
# Creating Individually Scheduled Volunteer Opportunities

Always determine the best schedule type before creating a volunteer opportunity. [See this article for information on the distinction between Individually Scheduled Opportunities \(ISO\) and Date & Time Specific Opportunities. \(D&T\)](#)

For information on how to Start creating a volunteer opportunity, see the introduction to the article "[Create a Volunteer Opportunity \(Date and Time Specific\)](#)"

## Creating an Individual Scheduled Opportunity (ISO)

Use the "Create Volunteer Opportunity" link in the left sidebar to create a new volunteer opportunity (classic), or the "Create Volunteer Opportunity" in the utility bar (SF Lightning)



## Define who is Managing the Opportunity

1. Select who is Managing the Volunteer Opportunity:

**Partner:** means that one of your partner organizations is managing the volunteers. These will usually be created in the partner portal by your partners themselves, but this option allows you to administratively create a partner-managed opportunity on their behalf.

**Affiliate:** means that YOUR organization will be managing the opportunity on behalf of one of your partners (either your staff or volunteer leaders will be managing the project and its volunteers)

2. **Organization Served.** All organizations in status "Active Partner" will appear in this picklist alphabetically. Choose the partner who will either be managing the project, or, in the case of an affiliate-managed opportunity, the organization that will receive the volunteer service.

3. Click the next button.

Create Volunteer Opportunity

Volunteer Opportunity Wizard

Managed By:

☒ Partner
 ☐ Affiliate

Organization Served

Advocate Squad

Create Volunteer Opportunity

One Step Attendance Reporting

+ Import Connections

+ Import Team Members

## Define the Volunteer Opportunity

Volunteer Opportunity Wizard

1

2

3

4

\*Volunteer Opportunity Name

Front Office Help

\*Volunteer Opportunity Description

We need volunteers to help our organization with front-office duties including reception, filing, and general organizational help on projects. Any two hours you're available on a given day would be helpful.

\*Opportunity Coordinator

ART TROUT

1. Give the Volunteer Opportunity a Descriptive Name

2. Describe in detail what the project is about and as much information as possible about what volunteers will do. (This will be a 'text' description - but you can optionally add hyperlinks, photos, and styles to the description after the opportunity is created and before you publish it. To do this you will click on the "Add/Change Description" link in the Volunteer Opportunity overview AFTER the opportunity has been created.

## Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

- |  |  |
|--|--|
| ✓ Opportunity Created  | ✓ Opportunity Description <a href="#">Add/Change Description</a>     |
| ✓ Occurrence Created   | ✓ Opportunity Characteristics (Optional—Improves Search and Metrics) |
| ✓ Scheduler Created <a href="#">View Scheduler</a> <a href="#">Create Multiple Connections</a> | ✓ Opportunity Published (Status: Active)                             |
|  | <input type="checkbox"/> Verifications Complete                      |

Total Active Occurrences: 1

Total Verifications Due: 0

**3. Opportunity Coordinator:** This is the person who will be in charge of managing the volunteers at this project. They will receive emails notifying them of volunteer signups and removals, and will be listed on the public site as the contact for this opportunity. For partner projects the picklist will indicate all valid contacts related to that organization. For affiliate managed opportunities, the list will include your staff, your organization's volunteer leaders, and the partner organization's contacts who have partner portal access.

## Define the Volunteer Opportunity (continued)

1

Primary Impact Area

Adult Education

2

Populations Served

Animals  
Families  
Homeless  
Immigrants, Refugees or Ethnic Groups  
LGBT (Lesbian, Gay,Bisexual,Transgender)

3

Type

☒ Project  
☐ Activity

4

Disaster Opportunity Type

☐ Emergency Preparedness  
☐ Disaster Response & Recovery  
☒ Not Disaster Related

5

Minimum Age

18

Minimum Age (w/ adult)

18

**1. Primary Impact Area:** Choose one from the drop down list.

**2. Populations Served:** (optional). Choose one or more populations that benefit from the service, and click on the right facing arrow to move them to the 'chosen' list. The chosen list can remain blank if desired.

**3. Type: Project or Activity** - A project is a volunteer opportunity that will result in service hours. An Activity is any other opportunity you may wish to make available to volunteers such as recognition events, trainings, social, etc. If you choose Activity you will be presented with another screen subsequently asking additional definitions of the type of activity you are creating.

**4. Disaster Opportunity Type:** By default, "Not Disaster Related" is selected for you. However if you wish to designate the opportunity as an emergency preparedness or Disaster Response & Recovery related opportunity you can do so.

**5. Minimum Age** -- what is the youngest age where a volunteer could attend on their own. (If under 18 you can ask they bring a parental consent, but the parent doesn't need to accompany them)

**Minimum Age (W/ adult)** -- to encourage family volunteering -- we'd like you to set the youngest age where a minor could attend this volunteer opportunity while accompanied by an adult, parent or guardian. (An adult can then create a Family Team - and then sign up anyone who meets the minimum age w/adult threshold. Those younger than the minimum age will NOT be able to sign up on their own.

## Defining the Opportunity (Continued)



**1** **Schedule Type** ⓘ

☐ Date & Time Specific

☒ Individually Scheduled

**2** ☐ Good for Groups

**3** ☒ Court Ordered Allowed

**4** ☒ RSVP/Seniors

### 1. Schedule Type:

**Date and Time Specific** - This is intended as an opportunity where you need a certain number of volunteers to attend and volunteer together. It takes place on a specific day with everyone starting at the same time and the opportunity ends at a defined time. This could happen just one time, or on a recurring basis (weekly, monthly, etc). You define how MANY volunteers can sign up for this opportunity, and they will see exactly when they are scheduled to attend.

**Individually Scheduled** - Some organizations need volunteers on an ongoing basis, and are happy to arrange the time and duration for each volunteer to fit their schedule. Examples might be "Office help needed" or "Mentors or Tutors needed". You might welcome volunteers at defined times of the day, (i.e. Mondays - Fridays anytime from noon - 5 pm)... but exactly

when the volunteer will attend, and for how long, is flexible and something you will schedule directly with the volunteer. If you need volunteers every day -- this is the preferred schedule type (as opposed to creating many, many date and time specific opportunities). [See this next article for information on how to create "Individually Scheduled Opportunities."](#) For the rest of this walk-through - we'll focus on creating date and time specific opportunities, but you must choose one or the other schedule type as part of creating an opportunity.

***In this example - we're going to create an Individually Scheduled Opportunity.***

**2. Good For Groups** - check this box if the opportunity is good for groups to participate in.

**3. Court Ordered Allowed** - check this box if you are running a court-ordered program and designating which opportunities court-ordered volunteer CAN volunteer for.

**4. RSVP/ Seniors** - If you are running an RSVP program, or want to flag in search certain projects as being well-suited to seniors - check this box.

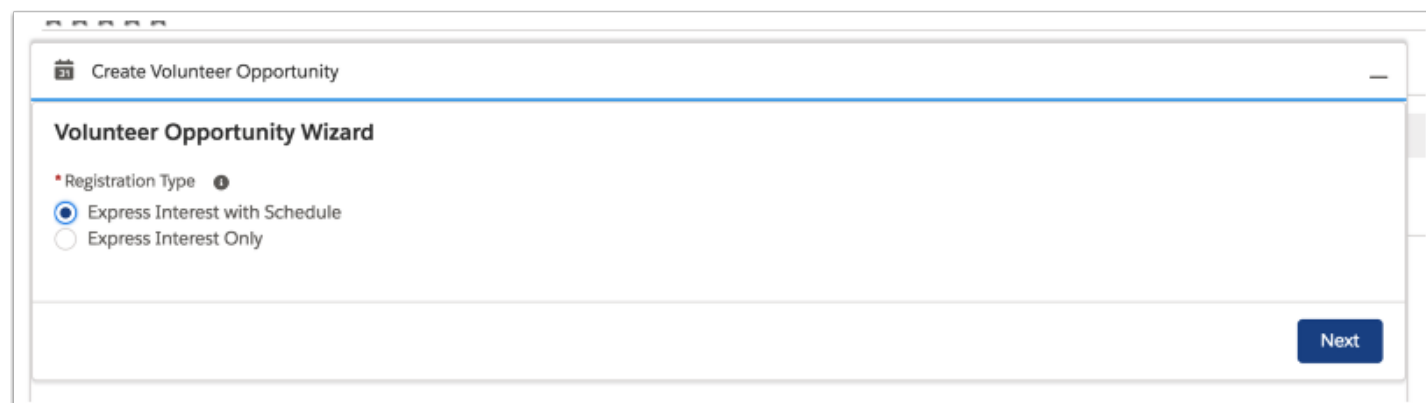
**Click the NEXT button to continue.**

## Registration Type

There are two Registration Types to choose from:

- **Express Interest with Schedule** - choose this type when you want to define the days of the weeks and hours when you are open to volunteers scheduling themselves. Volunteers will be able to express interest in one or more dates / times they'd like to volunteer -- and then you'll be able to review their proposed volunteering times (Connections), and approve, decline, and/or reschedule them. This is the easiest type of schedule to manage because volunteers can only propose times that fit the schedule you define, and you won't have to reach out to them and determine WHEN they'd like to volunteer
- **Express Interest Only** - choose this type of registration when you just want to find out who is generally interested in your volunteer opportunity. This is the right type if you don't plan to actually schedule volunteers to attend at a specific time and/or place, but just want to get a list of which volunteers are interested!

For more information on choosing the right schedule type for ISO opportunities, see the article "[Volunteer Opportunity Types](#)"



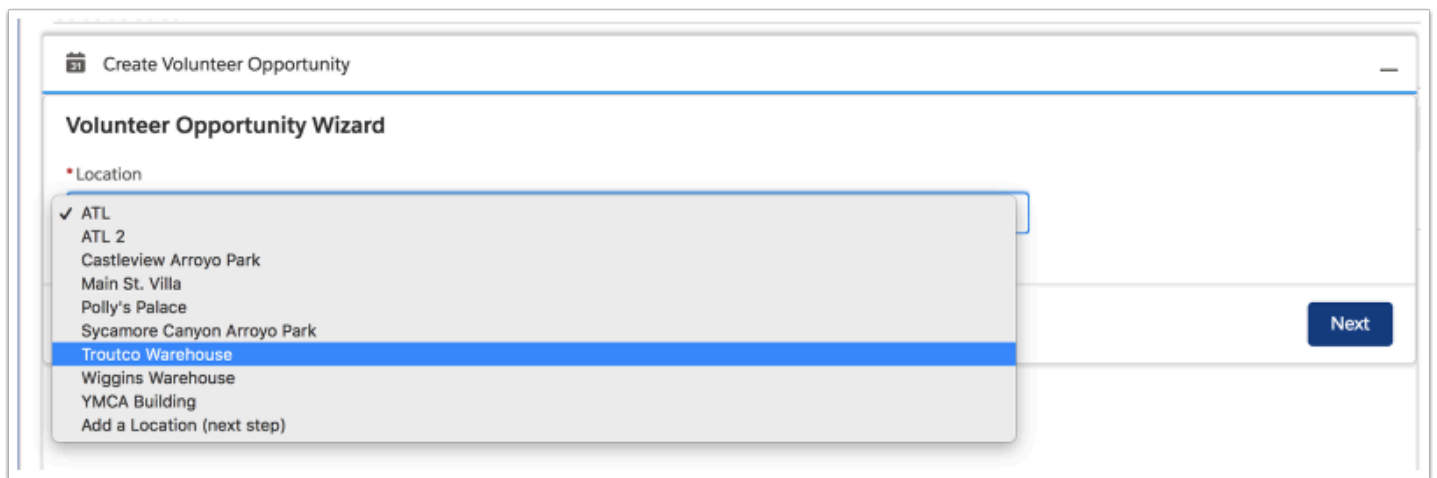
The screenshot shows a web interface titled "Create Volunteer Opportunity" with a sub-header "Volunteer Opportunity Wizard". Under the heading "Registration Type", there are two radio button options: "Express Interest with Schedule" (which is selected) and "Express Interest Only". A blue "Next" button is located at the bottom right of the form.

Let's continue in this example with creating an "Express Interest with Schedule" opportunity"

💡 To See the next steps for "Express Interest Only" - [click here to skip down further in this article.](#)

**On this screen you begin to set the schedule of when you need volunteers:**

## Choose a Location



The screenshot shows a web interface titled "Create Volunteer Opportunity". Below the title is a section labeled "Volunteer Opportunity Wizard". Under the "Location" heading, a dropdown menu is open, displaying a list of locations. The first item, "ATL", is checked with a green checkmark. The list includes: ATL, ATL 2, Castleview Arroyo Park, Main St. Villa, Polly's Palace, Sycamore Canyon Arroyo Park, Troutco Warehouse (which is highlighted with a blue bar), Wiggins Warehouse, YMCA Building, and "Add a Location (next step)". To the right of the dropdown is a blue button labeled "Next".

Choose an existing location you've previously created, or choose "Add a Location (next step)" if you need to create a new location.

## Choose the Date Range that the opportunity takes place

The Start Date is when volunteers can start volunteering for the opportunity. The End Date is the latest you are accepting volunteers to express interest in (for now. You can always update the End Date later to extend the opportunity)

Click Next to specify what days and times you need volunteers.

Create Volunteer Opportunity

Volunteer Opportunity Wizard

\* Start Date

Aug 21, 2018

\* End Date

Jan 21, 2019

Next

💡 It's recommended that you don't set the end date more than 6 months ahead of now. Things will change, and rather than having to update connections that were made a year in advance, you don't want people to make commitments too far ahead of time. (people move, locations change, etc.). We recommend no more than a six month initial interval for signups.

## Choose the days of the week and time periods you want volunteers

Volunteer Opportunity Wizard

When do you need Volunteers?

Choose a day of the week and a time range when volunteers are needed and then click next. You will have the option to add as many additional days of the week and time ranges as you like for this opportunity.

\* Day of the Week

Monday

\* Start Time

09:00 AM

\* End Time

05:00 PM

Next

Choose a day of the week, and the time range during which you need volunteers and click **next**. You'll have the option to add additional days and times so that you can specify each day of the week / time span when you need volunteers and they can propose their availability.

Example: if you say you need volunteers

- Mondays: 9:00 am - 5:00 pm
- Wednesdays: 12:00 - 5:00 pm
- Fridays: 9:00 am: 5:00 pm

Then a volunteer could propose their interest in volunteering:

- On a Monday from 11:00 am - 1:00 pm
- Every Wednesday from 12:00 - 2:30

Volunteers would NOT be able to propose volunteering:

- On a Tuesday
- Wednesday from 4 pm - 6 pm

## Add as many days / time ranges as you like to the schedule for this opportunity

To add another day or time range on the same day - answer YES, and click Next. You'll be taken back to the previous screen to add another day / time range.

When your schedule is complete, choose NO and click next.

**Volunteer Opportunity Wizard**

- Monday 09:00 AM - 05:00 PM

Would you like to add another day or time range for volunteers for this opportunity?

☒ Yes
 ☐ No

Next

**After choosing no, you're opportunity is created and complete. Click Finish.**

Create Volunteer Opportunity

**Volunteer Opportunity Wizard**

Thank you for submitting a volunteer opportunity.

Finish



Go to the Volunteer Opportunities tab, and you'll see your newly created opportunity at the top of the 'recent volunteer opportunities' view. [Click on it to add any additional details to your opportunity](#), and to publish your opportunity.

To Publish it: Click on the Publish Link in the Volunteer Opportunity Overview



**Volunteer Opportunity Overview**

Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created
- ✓ Scheduler Created [View Scheduler](#) [Create Multiple Connections](#)
- ✓ Opportunity Description [Add/Change Description](#)
- ✓ Opportunity Characteristics (Optional – Improves Search and Metrics)
- Opportunity Published (Status: Pending) [Publish](#)
- Verifications Complete

Total Active Occurrences: 0

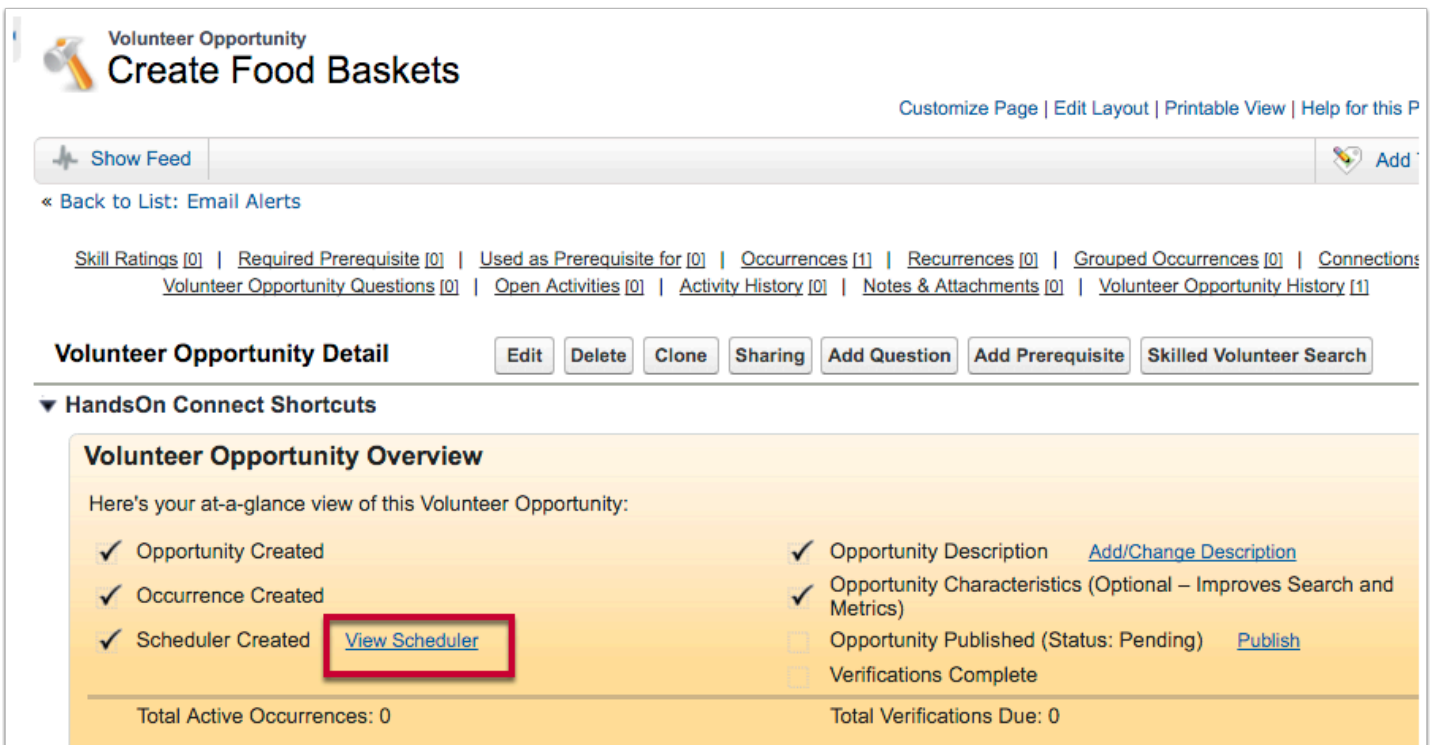
Total Verifications Due: 0

**Go to the Volunteer Opportunities tab and you'll see your newly created Volunteer Opportunity**

## Editing the schedule of an Individually Scheduled Opportunity - Express Interest with Schedule

If you wish to review and/or edit the schedule of when you need volunteers, you can do so from the Volunteer Opportunity Page.

Click on "View Scheduler"



**Volunteer Opportunity**  
**Create Food Baskets**

Customize Page | Edit Layout | Printable View | Help for this P

[Show Feed](#) [Add](#)

« Back to List: Email Alerts

[Skill Ratings \[0\]](#) | [Required Prerequisite \[0\]](#) | [Used as Prerequisite for \[0\]](#) | [Occurrences \[1\]](#) | [Recurrences \[0\]](#) | [Grouped Occurrences \[0\]](#) | [Connections](#)  
[Volunteer Opportunity Questions \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Volunteer Opportunity History \[1\]](#)

**Volunteer Opportunity Detail** [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Add Question](#) [Add Prerequisite](#) [Skilled Volunteer Search](#)

▼ **HandsOn Connect Shortcuts**

**Volunteer Opportunity Overview**

Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created
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- ✓ Opportunity Characteristics (Optional – Improves Search and Metrics)
- Opportunity Published (Status: Pending) [Publish](#)
- Verifications Complete

Total Active Occurrences: 0


Total Verifications Due: 0

## Scheduler Page

On the Scheduler Page you'll see the Start and End Date of the Individually Scheduled Volunteer Opportunity, and the days of the week / time ranges when you need volunteers. This schedule page controls when volunteers can and can't offer to volunteer. You can edit the schedule at any time by clicking on "Edit".

This is where you can change the days and times volunteers are needed. Editing the days and times will not affect existing connections that have been proposed by volunteers, but will define and limit when volunteers can propose a schedule in the future.

Click on Edit to make changes to the schedule:


**Scheduler**  
**SCH-000012**

**Scheduler Detail**
Edit
Delete
Back to Volunteer Opportunity

---

**▼ Occurrence Information**

Volunteer Opportunity [Create Food Baskets](#)
Occurrence [OC-036096](#)

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**▼ Time/Date Information**

Start Date 3/30/2016
End Date 6/30/2016

---

**▼ System Information**

Created By [Larry Deckel](#)
Last modified By [Larry Deckel](#)

Owner Larry Deckel

---

**▼ Volunteers can schedule in the following times**

Day of the Week	Time
Monday	09:00 AM - 04:00 PM
Wednesday	09:00 AM - 12:00 PM
Friday	09:00 AM - 05:00 PM

Page # 1 of 1

## Scheduler Edit Page

1. You can create new schedule days / time spans by clicking Add Day & Time. Here I'm going to add an additional schedule for Wednesday. (notice that there is already a 9 - noon schedule -- but we're taking two hours off for lunch, so we don't want volunteers from noon - 2. You can add multiple schedules on this page by adding additional days and times.
2. You can remove existing days / times by clicking "Remove"
3. Click Save after you've edited the schedule.

**Edit Scheduler**
3
Save
Cancel

**Occurrence Information**
I = Required Information

Volunteer Opportunity [Create Food Baskets](#)
Occurrence [OC-036096](#)

**Time/Date Information**

Start Date 3/30/2016
End Date 6/30/2016

**Volunteers can schedule in the following times**
1

Day of the Week Wednesday
Start Time 02:00 PM
End Time 05:00 PM
Add Day & Time

2

Actions	Day	Start Time	End Time
<a href="#">Remove</a>	Monday	09:00 AM	04:00 PM
<a href="#">Remove</a>	Wednesday	09:00 AM	12:00 PM
<a href="#">Remove</a>	Friday	09:00 AM	05:00 PM

**Saved view with new schedule added.**

Click on "Back to Volunteer Opportunity" to go back to the Volunteer Opportunity record.

**Scheduler Detail**
Edit
Delete
Back to Volunteer Opportunity

**▼ Occurrence Information**

Volunteer Opportunity [Create Food Baskets](#)
Occurrence [OC-036096](#)

**▼ Time/Date Information**

Start Date 3/30/2016
End Date 6/30/2016

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Owner Larry Deckel

**▼ Volunteers can schedule in the following times**

Day of the Week	Time
Monday	09:00 AM - 04:00 PM
Wednesday	09:00 AM - 12:00 PM
Wednesday	02:00 PM - 05:00 PM
Friday	09:00 AM - 05:00 PM

Our new date/time range has been added!

Page # 1 of 1

## Notes about Individually Scheduled Opportunities - Express Interest with Schedule

### **Individually Scheduled Opportunities are for individuals, not teams**

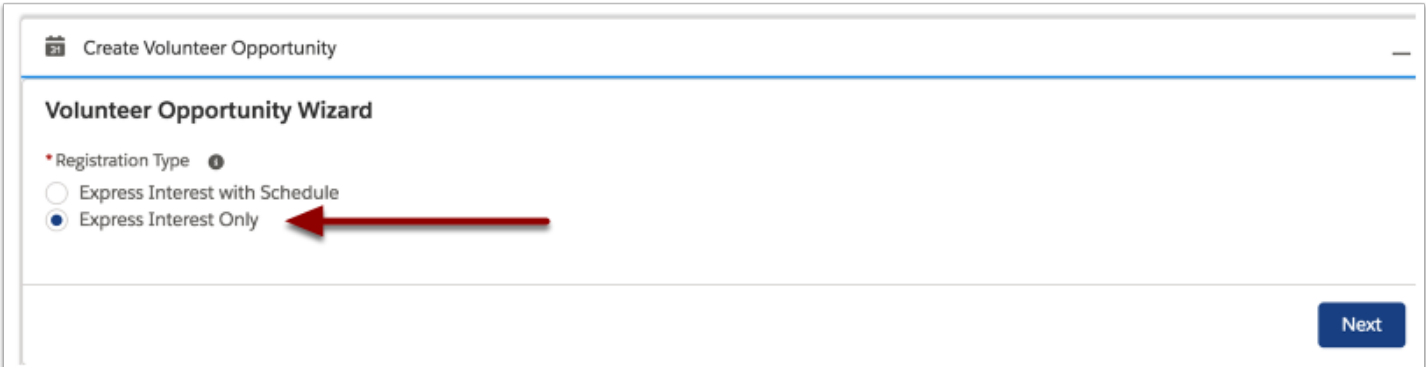
Individually Scheduled Opportunities are likely to have a lot of connections associated with them since a volunteer could potentially schedule themselves for up to 50 connections at a time. For this reason, we are not permitting team signups for these opportunities at the time. (A Team of 40 people signing up for a schedule with 30 dates would result in 1200 connections! That's not something we want to permit at this time.

### **Individually Scheduled Opportunities do not allow for custom questions.**

Custom Volunteer Opportunity Questions in HandsOn Connect were designed to get an answer for one-time volunteers. Since Individually Scheduled Opportunities are intended to allow a volunteer to express interest in many different dates over time, we don't want them asked the same question over and over again. It would also generate many many of the same answers. At this time, Volunteer Opportunity Questions cannot be added to Individually Scheduled Opportunities. (Depending on demand, we may find a solution in the future where a question would be asked only one time over the entire engagement with this opportunity).

## Creating Individually Scheduled Opportunity - Express Interest Only

You'll follow the same process as listed above, up until the point you are asked the Registration Type. In this case, we'll use "Express Interest Only"

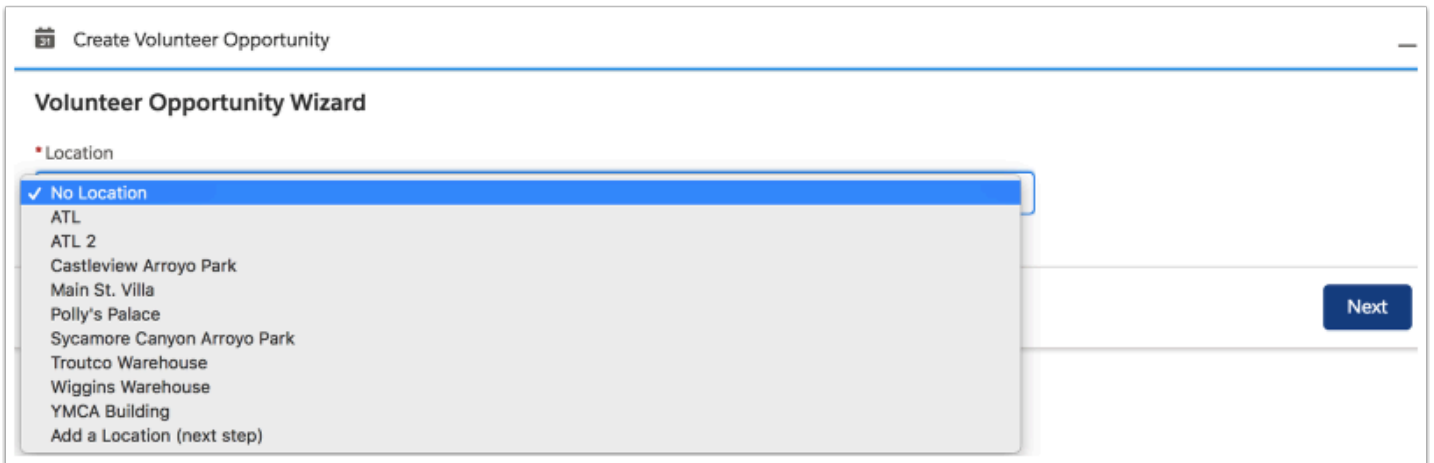


The screenshot shows a web interface titled "Create Volunteer Opportunity". Below the title is a section labeled "Volunteer Opportunity Wizard". Under this section, there is a heading "Registration Type" followed by two radio button options: "Express Interest with Schedule" and "Express Interest Only". The "Express Interest Only" option is selected, and a red arrow points to it. A "Next" button is located at the bottom right of the form.

💡 Because Individually Scheduled Opportunity - Express Interest Only does not necessarily take place at a specific date and time -- it can be used to just find out if people are interested in becoming board members, or interested in hearing more about upcoming disaster response opportunities. That means connections won't be for a specific date and time, and may not even take place at a specific location.

## Location:

You can create a location, or choose an existing location, but you also have the option of having "No Location" for Express Interest Only Opportunities. Choose and click next.



The screenshot shows a web interface titled "Create Volunteer Opportunity". Below the title is a section labeled "Volunteer Opportunity Wizard". Under this section, there is a "Location" field with a dropdown menu. The dropdown menu is open, showing a list of options: "No Location" (which is selected with a checkmark), "ATL", "ATL 2", "Castlevew Arroyo Park", "Main St. Villa", "Polly's Palace", "Sycamore Canyon Arroyo Park", "Troutco Warehouse", "Wiggins Warehouse", "YMCA Building", and "Add a Location (next step)". To the right of the dropdown menu is a blue "Next" button.

## Start Date and End Date

Since this opportunity isn't looking for volunteers at specific times and days of the week (as "Express Interest with Schedule" registration does) -- we just need to list when to Start displaying the opportunity, and when to End displaying the opportunity on the public site.

Create Volunteer Opportunity

Volunteer Opportunity Wizard

\* Start Date

Aug 21, 2018

\* End Date

Dec 24, 2018

Next

That's it! You're done! Click Finish!

Create Volunteer Opportunity

Volunteer Opportunity Wizard

Thank you for submitting a volunteer opportunity.

Finish

Go to the Volunteer Opportunities tab, and you'll see your newly created opportunity at the top of the 'recent volunteer opportunities' view. [Click on it to add any additional details to your opportunity](#), and to publish your opportunity.

To Publish it: Click on the Publish Link in the Volunteer Opportunity Overview

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

✓ Opportunity Created

✓ Occurrence Created

✓ Scheduler Created

[View Scheduler](#)
[Create Multiple Connections](#)

✓ Opportunity Description

[Add/Change Description](#)

✓ Opportunity Characteristics (Optional – Improves Search and Metrics)

☐ Opportunity Published (Status: Pending)
 

Publish

☐ Verifications Complete

Total Active Occurrences: 0

Total Verifications Due: 0

HandsOn Connect - Creating Individually Scheduled Volunteer Opportunities

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