

# Team Kinetic User Guide - Organisations

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## Organisation Guide

### How to use this guide

This guide will show you how to use Team Kinetic as a provider to advertise your volunteer roles and manage your volunteers using the system.

If you prefer watching videos rather than reading a guide, Team Kinetic have created this handy video showing how to use their system as a provider. To watch either [click on the link](#) below or copy and paste this link into the browser.

<https://www.youtube.com/watch?v=-W-JBGUHMUY>

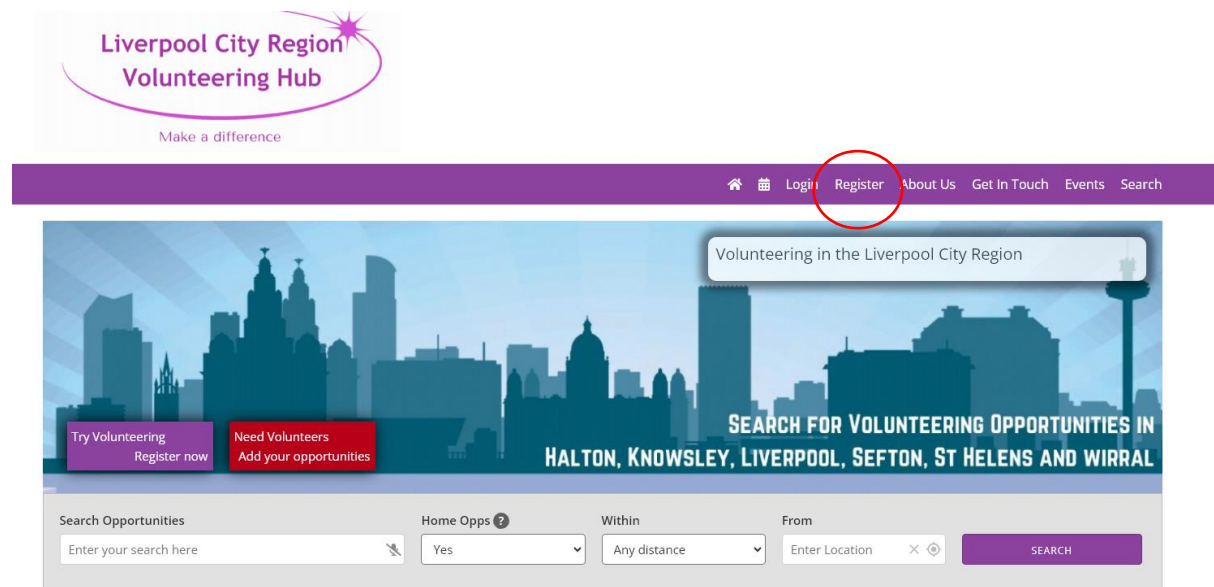
Last updated: 28/06/2023

### How to register your organisation?

To start, create your Team Kinetic account by following the link on the home page of the Volunteer Centre website ([volunteeringlcr.org](http://volunteeringlcr.org)).

To register on Team Kinetic, you will need to click on 'Advertise your Volunteer roles'.

You can also [click on this link](#) or copy and paste the link below to register  
<https://volunteercentresefton.teamkinetic.co.uk/volunteers/registration-provider>



Then click on register as a provider

Liverpool City Region  
Volunteering Hub

Make a difference

Volunteer Registration

Email

REGISTER

REGISTER WITH GOOGLE

REGISTER WITH FACEBOOK

REGISTER AS A PROVIDER

Terms and Conditions

SEARCH

Fill out the fields with your organisation's details.

Liverpool City Region  
Volunteering Hub

Make a difference

Organisation Name

Contact Name

Contact Email Address

Contact Number

Select your country

United Kingdom

Enter postcode then hit search to find the address

SEARCH

Manchester

Upon registering you will receive an email from [volunteering@mail.teamkinetic.co.uk](mailto:volunteering@mail.teamkinetic.co.uk) to the email address you have signed up with. This email will contain a registration link that you will need to click on in order to verify your account. Once you follow the link you will be able to log into your account as normal. If you do not verify your account, you will not be able to log in and you will get the message in red below.

If you have not received your email into the inbox in a timely manner you will be able to click on 'I've lost it, send the email again (see below) or you may need to check your junk folder.



Your main provider account has not yet been verified. Please click the verify link in your welcome email that you were sent when registering.

[I've lost it, send me the email again!](#)  
(this will be sent to james.sherry@seftoncvcs.org.uk)

Your new account email has been confirmed, please login in below.

Email

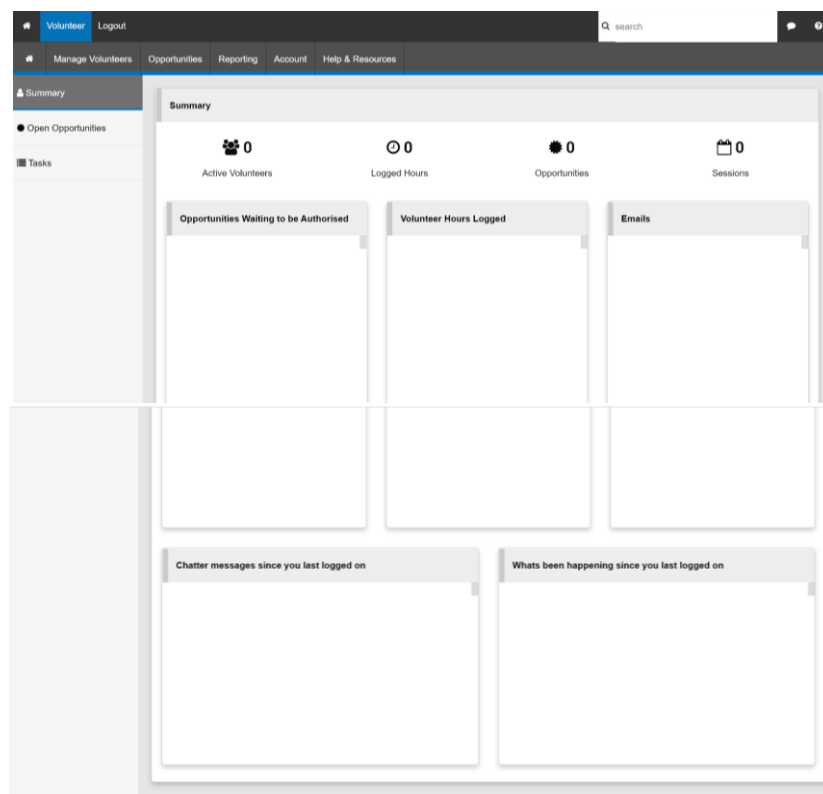
Password

LOGIN

SIGN IN WITH LINKEDIN

SIGN IN WITH GOOGLE

Once you have confirmed your email you can log on. This will take you to your dashboard.





## [How to log in once you've registered?](#)

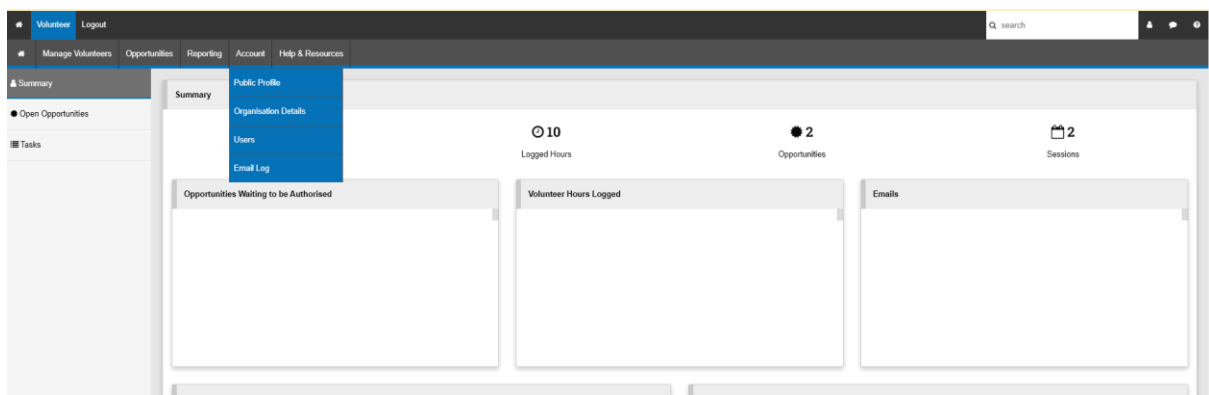
Once you have set up and verified your account you can [log in here](#).  
<https://volunteercentresefton.teamkinetic.co.uk/vk/providers/login.htm>

## [Adding colleagues to your team kinetic account](#)

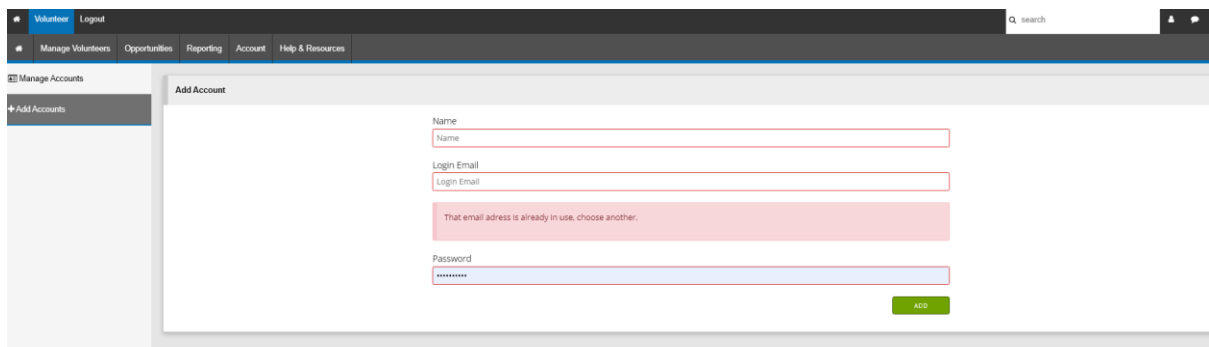
To add a colleague to your Team Kinetic account, follow these steps:

**Step 1:** Go to accounts

**Step2:** go to users



**Step 3:** Add user. Then fill in the required fields and press add

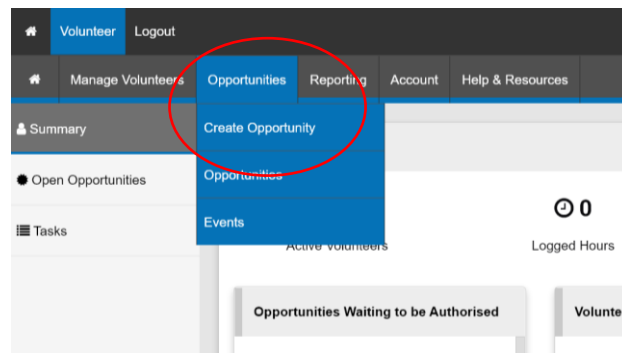


## Creating a volunteering opportunity

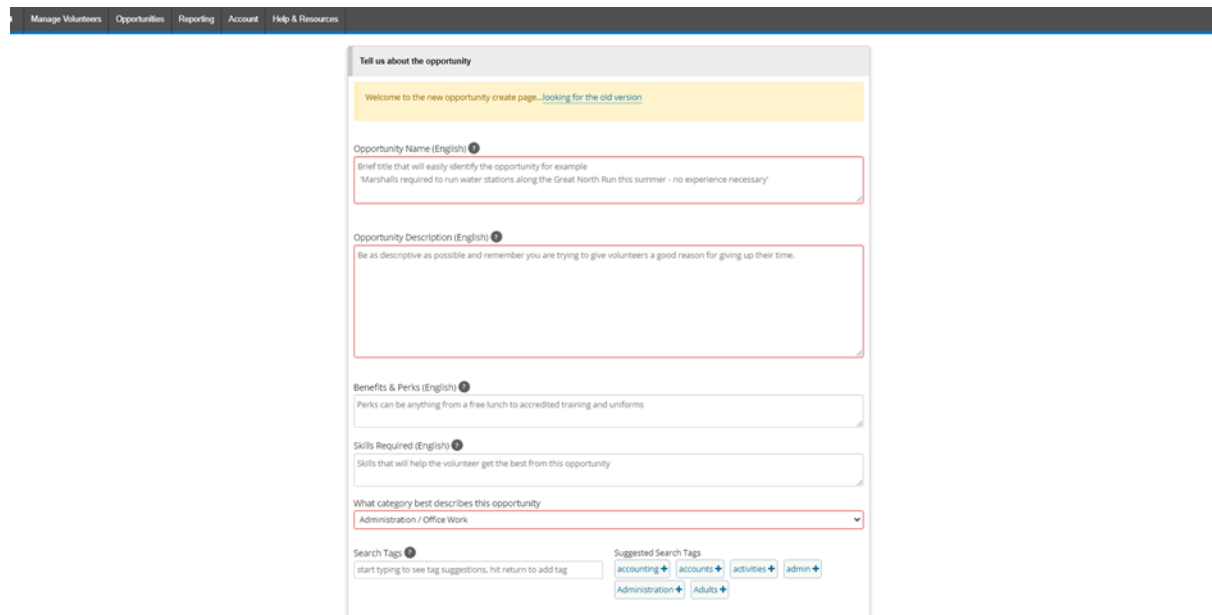
To be able to sign up volunteers you will need to create an advert or role description; this is called an opportunity.

### How to create an advert for your volunteering opportunity?

**Step 1:** To create a volunteer opportunity click the “**Create Opportunity**” option under the **Opportunities** dropdown menu.



**Step 2:** Once you’ve clicked ‘create opportunity’ you will be taken to this page.



Tell us about the opportunity

Welcome to the new opportunity create page...looking for the old version

Opportunity Name (English) ⓘ  
Brief title that will easily identify the opportunity for example  
"Marshalls required to run water stations along the Great North Run this summer - no experience necessary"

Opportunity Description (English) ⓘ  
Be as descriptive as possible and remember you are trying to give volunteers a good reason for giving up their time.

Benefits & Perks (English) ⓘ  
Perks can be anything from a free lunch to accredited training and uniforms

Skills Required (English) ⓘ  
Skills that will help the volunteer get the best from this opportunity

What category best describes this opportunity  
Administration / Office Work

Search Tags ⓘ  
start typing to see tag suggestions, hit return to add tag

Suggested Search Tags  
accounting+ accounts+ activities+ admin+  
Administration+ Adults+

You will need to fill out the red required fields. If you are unsure of what a particular field means, you can click on the question mark (?) next to the field name for a short explanation of what it means. You can also click on the “View example” button below a field for a quick example of the sort of information you should be entering into the field.





**Opportunity Name** – This should be the role title. We recommend adding the role name and include the general location e.g. Volunteer Shopper - Bootle

**Opportunity Description** – This is where you will describe the role and what is expected. We recommend including a brief description of the role, any training they may need to complete and whether they need a DBS to take part.

**Benefits and Perks** – Any extras that might encourage the volunteer to apply such as improved job prospects, opportunity to give back to the local community, learn new skills.

**Skills Required** – Here you will add if you need specialist skills for the role, for example your volunteer may need a full driver's license or need to be able to have good knowledge of computers.

**Category** – This helps volunteers to find your opportunity when they are searching for opportunities. For example, when volunteers are searching they can select categories such as gardening. We recommend selecting whichever category is most appropriate for your opportunity.

**Search tags** – These are keywords/phrases that describe the opportunity. You can use more than one and is a more detailed way of categorizing your opportunity. This is useful for when a volunteer in looking for a particular role, for example, working with animals. When the volunteer searches for animals all opportunities with the tag animals will be brought up. Using appropriate keywords will help make your opportunity more accessible.

**Step 3:** Next you will need to add an image. The image will need to be 1200 X 300 pixels. Please save as an image file such as a Jpeg or PNG.

Choose your opportunity image

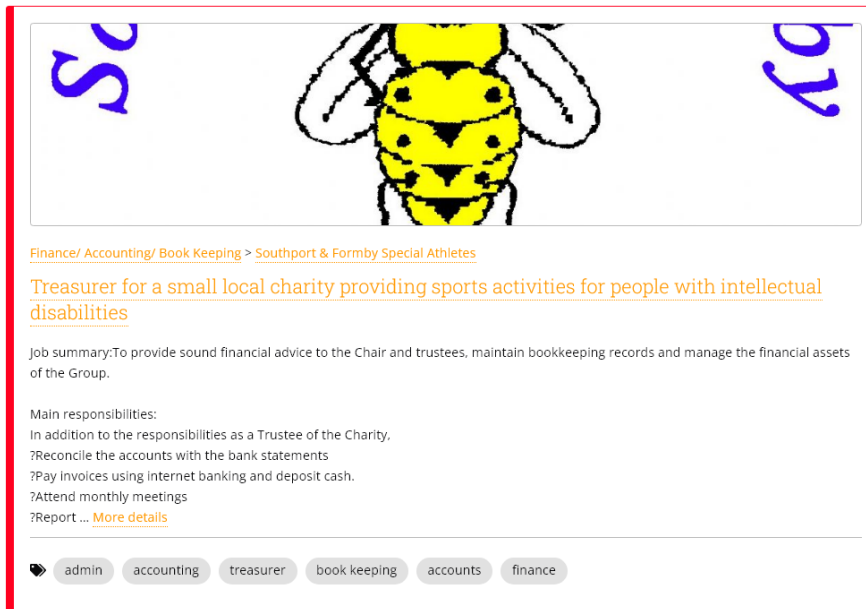
Upload a new image (1200 by 300 pixels is the perfect size)

No file chosen

Or click to choose one of your past images



If it is not this size, the image will not sit correctly. The image will not automatically resize. See below what it will look like if the image is not sized correctly. If you need help to adjust this image to work you can email the Volunteer Centre at [info@volunteeringsefton.org.uk](mailto:info@volunteeringsefton.org.uk).



**Step 4:** You will then be asked to choose the location of the volunteering opportunity. You also have the option to state if this is a home/virtual opportunity (i.e able to do the role from your own home).

Where is your opportunity based

This opportunity is at a certain location or area
PICK THE LOCATION

You can do this opportunity from anywhere
IT'S A HOME OPPORTUNITY

BACK
NEXT

**Step 5:** You can choose to create a fully managed opportunity or create a self-managed opportunity.

**Liverpool City Region Volunteering Hub**  
Make a difference

**How do you want to manage your volunteers**

**I want to use this system to manage my volunteers**

You'll gain access to some great FREE extra features including creating rotas and recording hours, search and filter your volunteers and view extra volunteer information

CREATE A FULLY MANAGED OPPORTUNITY

**I only want to advertise my opportunity**

We will advertise your opportunity and direct volunteers to your website, record who is interested and send you an email when volunteers click apply

CREATE A SELF MANAGED OPPORTUNITY

BACK

**Fully managed opportunity** – This means you intend to use the FREE Team Kinetic service to manage the recruiting and management of volunteers. **Recommended.**

Choosing the fully managed opportunity means you will be able to:

- Recruit volunteers
- See all the volunteer hours that have been logged
- Keep all your volunteer's documents in one place

**A self-managed opportunity** - This means you have your own volunteer management tool you want to use.

**Step 6** – You will now need to fill out the following

**Do volunteers need to apply first** – Here you can choose whether a volunteer needs to apply or can join an opportunity straight away. For example, a bucket collection may require a volunteer to simply give their contact details and turn up on the day whereas a Befriender would need more checks and training prior to commencing their role. We would recommend that you add apply to your

**Ask for experience** – Here you can choose whether you need volunteers to have relevant experience.

**Send customised email** – Tick the box if you would like to send a customised email to those interested in the opportunity.



**Opportunity Application Process**

Do volunteers need to apply first ?

No, volunteers can immediately join the opportunity

Ask for experience ?

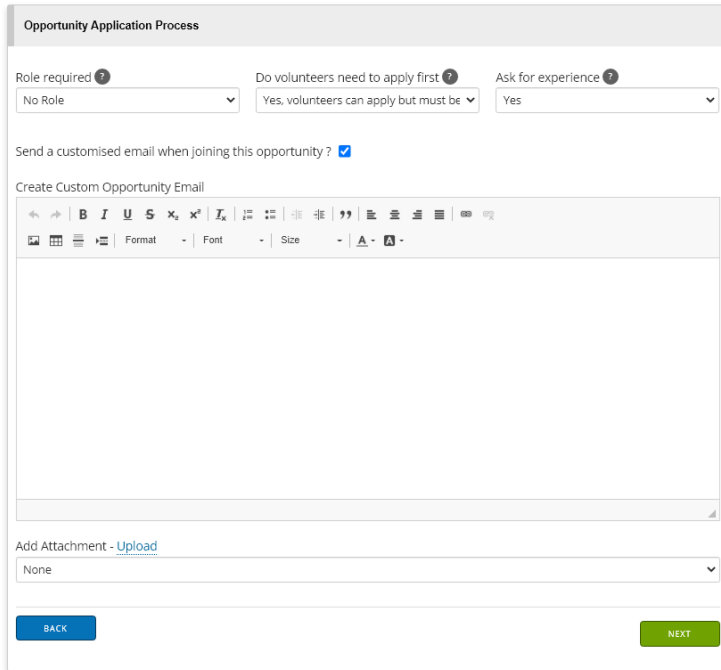
No

Send a customised email when joining this opportunity ? ☐

BACK

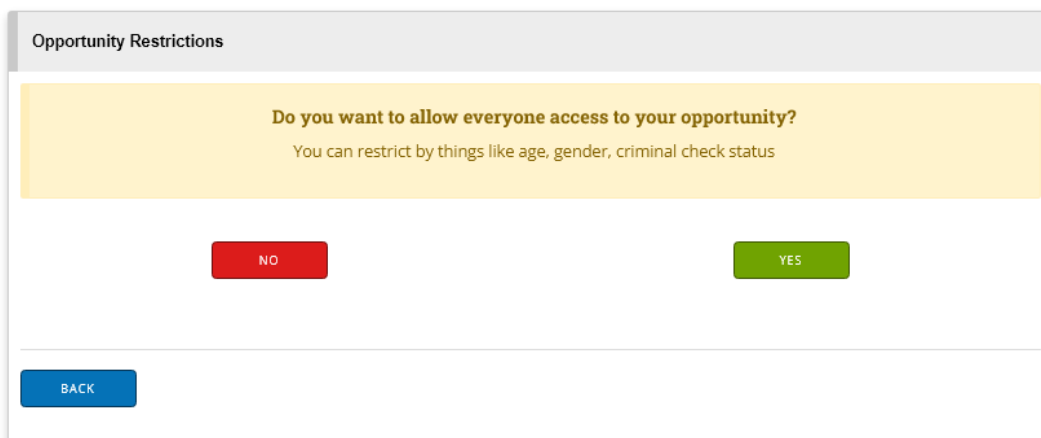
NEXT

## Creating a customised email



Once you've ticked the 'send customised email' a text box will come up and you can write your custom email for volunteers applying for the opportunity. You may want to use this to link to an online application form, to give more information regarding the role or to invite the volunteer to an event where they can get more information.

**Step 7** – This gives you the option to restrict your opportunity. You can restrict by age, gender etc. For example, you may want to only recruit young people between the age of 16-25. This feature allows you to do this. Ignore the options regarding restricting by criminal record checks. If needed, you will need to DBS and vet your volunteer beforehand.



If you wish to restrict your opportunity click **NO**. You will then be given the options to restrict your opportunity.

**Opportunity Restrictions**

**Do you want to allow everyone access to your opportunity?**

You can restrict by things like age, gender, criminal check status

NO
YES

Minimum Age

Maximum Age

Gender

Maximum sessions <sup>?</sup>  
  
(leave blank for no maximum)

Must be linked to provider to join

BACK
NEXT

You can then choose to restrict by age, gender and the maximum number of sessions a volunteer can do (if applicable).

**Provider linked volunteers** – You can choose to only allow applications from volunteers that are linked to your organisation. This option is useful if your organisation already has a group of volunteers that regularly take part in opportunities for you.

**Step 8** – You will then be asked to state whether you pay expenses.

**Expenses**

Are expenses payable on this opportunity?

BACK
NEXT

If you click yes, you will be asked to give more information. e.g. what you pay per mile, if you pay for bus and or train tickets, taxi policy and food.

**Expenses**

Are expenses payable on this opportunity?

Yes ▼

Expenses Information (English) ?

BACK
NEXT

**Step 9** –Here you will be asked to choose preferences for promoting and sharing.

**Promoting and Sharing**

Hide opportunity from search results and make secret ?

No ▼

Is opportunity accessible ?

No ▼

Opportunity part of a larger Event ?

No ▼

Share opportunity to TryVolunteering ? ?

Yes ▼

BACK
NEXT

**Hide opportunity from search results and make secret** - This option hides your opportunity from search results, so only those that you have given a link to can access the opportunity.

**Is opportunity accessible** – Is it accessible to those with mobility issues.

**Opportunity part of a larger event** – Organisations can create events to link a number of different opportunities. If your opportunity is part of an event it can be selected here if the event has been created on Team Kinetic. E.g. a festival, Christmas event such as a lights switch on, which may have multiple roles. (See How to create an event)

**Share opportunity with Try Volunteering** – This is an external website managed by Team Kinetic which is nationwide and is linked with Volunteering Centre Sefton.



**Step 10** - You can upload any files that you would like to provide to the volunteers such as maps, timesheets, reference request forms, application forms etc

**Opportunity Documents**

Upload a document for joined volunteers to download? ?

No

BACK

NEXT

**Step 11** – Here you can allow volunteers to upload files and add a post opportunity survey link

**Post Opportunity Options**

Allow volunteers to upload files to opportunity ?

No

Add a post opportunity survey link ?

No

BACK

NEXT

**Post Opportunity Files** – You can ask the volunteers to upload files once they have completed the opportunity.

**Post Opportunity Survey Link** – You can add a link to a survey for volunteers to complete once they have completed the opportunity.

**Step 12** – In this last step, you can choose if you want you set up individual sessions or want to add a flexible opportunity.



# Liverpool City Region Volunteering Hub

Make a difference

## Opportunity Times and Sessions



### Individual Sessions

You need volunteers for specific times or dates which you already know (you can add extra sessions at anytime).



### FLEXIBLE

You may have a completion date in mind but are flexible about when the volunteer attends.

BACK

CREATE OPPORTUNITY




## [How to create sessions](#)

If you have certain pre-arranged sessions then you can add sessions individually or if you have a regular session that happens at the same time each week or month you can add a recurring session. E.g. a lunch club.


To add individual sessions, you will need to choose the number of max volunteers per session and start date (you can start it from the date you created the opportunity or for a date in the future. Its not possible at the moment to back date)

**Opportunity Times and Sessions**



### Individual Sessions

You need volunteers for specific times or dates which you already know (you can add extra sessions at anytime).



### FLEXIBLE

You may have a completion date in mind but are flexible about when the volunteer attends.

ADD A RECURRING SESSION

ADD SESSIONS INDIVIDUALLY

Max Vols PER SESSION ?

Signup closing date? ?

Starts On

At  
 :

For  
 :

Repeats every  
 Weeks

Repeats on  
Mo ☒ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su ☐

Ends After

☒  Occurrences ☐  On date ☐ 12 Months (maximum)

BACK

CREATE OPPORTUNITY

Next you will need to choose a start time and the duration. You can then choose which days this repeats on.


For the ends after you can choose to end it after a certain number of occurrences, a specific date or after 12 months.

You fully edit, change and add sessions after you have created your volunteer opportunity.

## Flexible opportunities


You can use the flexible opportunity if you are not sure when your volunteering sessions will happen before recruitment or if you have flexible times for volunteering. For example, a gardening volunteer can come at any time and do the jobs that need doing.

**Opportunity Times and Sessions**



**Individual Sessions**

You need volunteers for specific times or dates which you already know (you can add extra sessions at anytime).



**FLEXIBLE**

You may have a completion date in mind but are flexible about when the volunteer attends.

Volunteers <sup>?</sup>

Start date <sup>?</sup>

End date <sup>?</sup>

Signup closes on <sup>?</sup>

Maximum Time <sup>?</sup>  
 Days (7hrs) ▼

BACK
CREATE OPPORTUNITY

Once you have completed all of the necessary fields, you will be able to select the “Add New Opportunity” button at the bottom of the page.

This will take you to the opportunity summary page. You will see the message “Opportunity is CLOSED. This opportunity is awaiting authorisation.” This means that Volunteer Centre Sefton needs to authorise the opportunity before it will show up in search results. This should happen within approximately 24-48 hours. (The Volunteer Centre is not open on weekends or bank holidays) You will receive a confirmation email from [volunteering@mail.teamkinetic.co.uk](mailto:volunteering@mail.teamkinetic.co.uk) once the authorisation has happened. If you have any issues please email [info@volunteeringsefton.org.uk](mailto:info@volunteeringsefton.org.uk)

Volunteer Logout
search

Manage Volunteers Opportunities Reporting Account Help & Resources

- Summary
- ✓ Applicants
- Volunteers
- Sessions
- Log Hours
- Details
- Location
- Sharing
- Restrictions

### Example Volunteer Opportunity

**Summary**

<b>0</b>	<b>0%</b>	<b>0</b>	<b>1</b>	<b>0</b>
Volunteers	Of Slots Filled	Hours Logged	Empty Sessions	Hours To Log

Opportunity is CLOSED. This opportunity is awaiting authorisation. ✕

Action emails are active [MUTE Emails](#) <sup>?</sup> ✕

**Website Activity**



## How to create an event?

An event is a great way to group opportunities together. For example, a festival or Christmas event you may be organising.

**Step 1**- Go to 'Opportunities & Providers'.

**Step 2** - Click 'Events'.

The screenshot shows the 'Add Event' form within the 'Volunteer' section of the 'Opportunities & Providers' menu. The form includes the following fields and elements:

- Event Name:** A text input field.
- Event Website:** A text input field with a red 'X' icon and the text 'Invalid'. Below it, a warning message states: 'There are some reserved characters that are not allowed in website addresses that will be removed as you type.' The URL 'https://volunteercentresefton.teamkinetic.co.uk/event/' is visible in the input field.
- Maximum sessions PER VOLUNTEER:** A text input field with a help icon (?) and the instruction 'Leave blank for unlimited'.
- SAVE:** A green button at the bottom right of the form.

**Step 3** - Fill in the necessary fields and click 'Add'.

Next, you can either create a new opportunity to be part of the event, or add an existing opportunity to it.

## Creating an opportunity as part of an event

**Step 1** - Go to 'Opportunities'.

**Step 2** - Click 'Create Opportunity'.

**Step 3** - Fill in all fields until you reach the boxes below.

The screenshot shows a form titled 'Opportunity part of a larger Event' with a help icon (?). It includes the following fields and elements:

- Yes:** A text input field.
- Select Event:** A dropdown menu with 'Summer Football Fair' selected.

**Step 4** Finish creating the opportunity as usual.




## [Adding an existing opportunity to an event](#)

**Step 1** - Go to 'Opportunities and Providers'.

**Step 2** - Click 'Opportunities'.

**Step 3** - Find the opportunity you wish to add and click on it.





**Step 4** - Click on the 'Details' tab on the left-hand-side menu and scroll down until you see the options pictured above to add the opportunity to the event.


Tags 

start typing to see tag suggestions, hit return to add tag

Suggested Tags

Added Tags

computer volunteer  Computers  Technology  Tech Support 

Is opportunity accessible 

Yes


Opportunity part of an Event

No

---

**Travel Information**

---

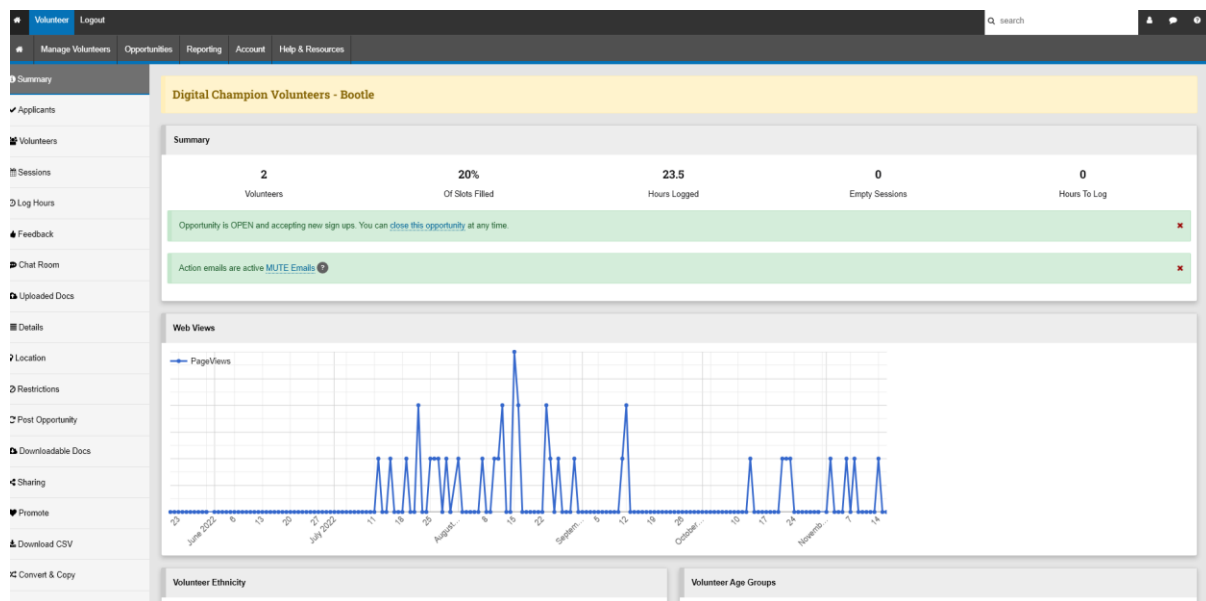
Travel Information  [View example](#)

For more details on how to create an event [click here](#) or copy and paste the URL into your web browser. <https://teamkinetic.co.uk/blog/2020/05/07/gswl6-creating-events/>

You can find a video on how to create an event as a provider under **help & resources > video tutorials**

## How do I manage & edit an opportunity?

Like the organisation dashboard, this page provides a quick look at all of the useful information regarding your opportunity. This page can be accessed by on the left side of the page, you have a number of options to manage your opportunity. We will go through each option below.



- **Applicants** – Displays lists of the New Applicants, Approved Applicants and Denied Applicants which includes their details.
- **Volunteers** – Displays a list of all of the Volunteers who have joined the opportunity and their details.
- **Sessions** – Displays all of the created sessions for the opportunity and allows you to assign volunteers to particular sessions.
- **Log Hours** – Allows you to log the hours for each volunteer so you have an accurate measure of how much time each person has spent volunteering for this opportunity.
- **Details** – This is where you can edit the details of your opportunity such as role description, title etc.
- **Location** – Displays the location of the opportunity and allows you to edit it.
- **Sharing** – This is where you can choose to stop or start sharing on other networks such as Try Volunteering.
- **Restrictions** – Displays the restrictions you have set up for applying to the opportunity and allows you to edit them e.g. age. Also displays the number of applicable volunteers for your opportunity.
- **Post Opportunity** – Allows you to add any post opportunity documents and survey links.
- **Downloadable Docs** – Allows you to upload any documents that volunteers can download for the opportunity. For example, signing in sheets or expenses forms
- **Uploaded Docs** – Displays any documents that you have uploaded for volunteers.
- **Download CSV** – Downloads a CSV file containing data about the opportunity that can be opened in Microsoft Excel.



- **Chat Room** – Allows you to send messages to volunteers that have signed up to the opportunity.
- **Feedback** – Displays any feedback from volunteers and organisations using the Feedback feature.
- **Promote** – Displays quick links to share the opportunity on Facebook, Twitter, Pinterest, LinkedIn and via email. Also provides a link to the opportunity that can be copied and pasted.
- **Convert and Copy** – Allows you to convert the opportunity from a Flexible Opportunity to a Session Based Opportunity and vice versa. Also allows you to create a copy of the opportunity and shift the session dates forward.
- **Delete** – Deletes the opportunity from the system. It cannot be recovered once deleted.

## How to manage sessions?

When you have created sessions for your volunteer opportunity you can edit them and as long as your volunteers are linked to the opportunity you can add volunteers to a session. Volunteers are also able to add themselves to an opportunity through their own portal.

Opportunity Sessions (Starts: Sunday 19 March 2023 | Ends: Sunday 7 April 2024)

ADD SESSION ADD VOLUNTEERS EDIT GLOBAL MAXIMUMS

Show All Volunteers Jump to Past Sessions

☐ Select All

Empty Session	<input type="checkbox"/> 17:00, Sunday 30 April 2023 (2)	0 volunteers from a maximum of 5					
Empty Session	<input type="checkbox"/> 17:00, Sunday 7 May 2023 (2)	0 volunteers from a maximum of 5					
Empty Session	<input type="checkbox"/> 17:00, Sunday 14 May 2023 (2)	0 volunteers from a maximum of 5					
Empty Session	<input type="checkbox"/> 17:00, Sunday 21 May 2023 (2)	0 volunteers from a maximum of 5					
Empty Session	<input type="checkbox"/> 17:00, Sunday 28 May 2023 (2)	0 volunteers from a maximum of 5					

Above is an example of how sessions will look when you want to edit them. The blue buttons on the top give you the option to add other sessions, add volunteers and edit global sessions. Under 'edit global sessions' you can edit the number of volunteer you need and how many sessions they can do. (if that is relevant to your opportunity)

Opportunity Sessions (Starts: Sunday 19 March 2023 | Ends: Sunday 7 April 2024)

ADD SESSION ADD VOLUNTEERS EDIT GLOBAL MAXIMUMS

Maximum Volunteers PER SESSION <sup>?</sup>  Maximum sessions PER VOLUNTEER <sup>?</sup>

SAVE

[Show All Volunteers](#) [Jump to Past Sessions](#)

☐ Select All

You also have the option to see past sessions and all volunteer you have in each session (see screen shot below)

17:00, Sunday 30 April 2023 ⚙️ + 📧 📞 ✖️

✓ 1 volunteers from a maximum of 5

---

 **Catrin Hughes** ✖️

Catrin has logged 0 hrs, joined 0 days ago

Test Organisation has logged 0 hrs

The green buttons and red buttons on each session is where you can edit each individual session.

Opportunity Sessions (Starts: Sunday 19 March 2023 | Ends: Sunday 7 April 2024)

ADD SESSION ADD VOLUNTEERS EDIT GLOBAL MAXIMUMS

[Show All Volunteers](#) [Jump to Past Sessions](#)

☐ Select All

Empty Session

☐ 17:00, Sunday 30 April 2023 (2) ⚙️ + 📧 📞 ✖️

⬆️ 0 volunteers from a maximum of 5

Empty Session

☐ 17:00, Sunday 7 May 2023 (2) ⚙️ + 📧 📞 ✖️

✓ 0 volunteers from a maximum of 5

Empty Session

☐ 17:00, Sunday 14 May 2023 (2) ⚙️ + 📧 📞 ✖️

✓ 0 volunteers from a maximum of 5

Empty Session

☐ 17:00, Sunday 21 May 2023 (2) ⚙️ + 📧 📞 ✖️

✓ 0 volunteers from a maximum of 5

Empty Session

☐ 17:00, Sunday 28 May 2023 (2) ⚙️ + 📧 📞 ✖️

✓ 0 volunteers from a maximum of 5





The cog icon means settings here you can edit session name, date, time duration and number of volunteers. (see screenshot below)

The screenshot shows the Liverpool City Region Volunteering Hub interface. At the top, there are buttons for 'ADD SESSION', 'ADD VOLUNTEERS', and 'EDIT'. Below these are links for 'Hide All Volunteers' and 'Jump to Past Sessions'. The main content area displays a list of sessions. A modal window is open for editing a session. The modal has a title bar with a close button (X). It contains the following fields:

- Session Name:** A text input field with the placeholder 'Session name'.
- Session Date:** A date input field showing '30/04/2023'.
- Start time:** A time input field showing '17' and '00'.
- Duration:** A time input field showing '2' and '00'.
- Maximum Volunteers:** A text input field showing '5'.

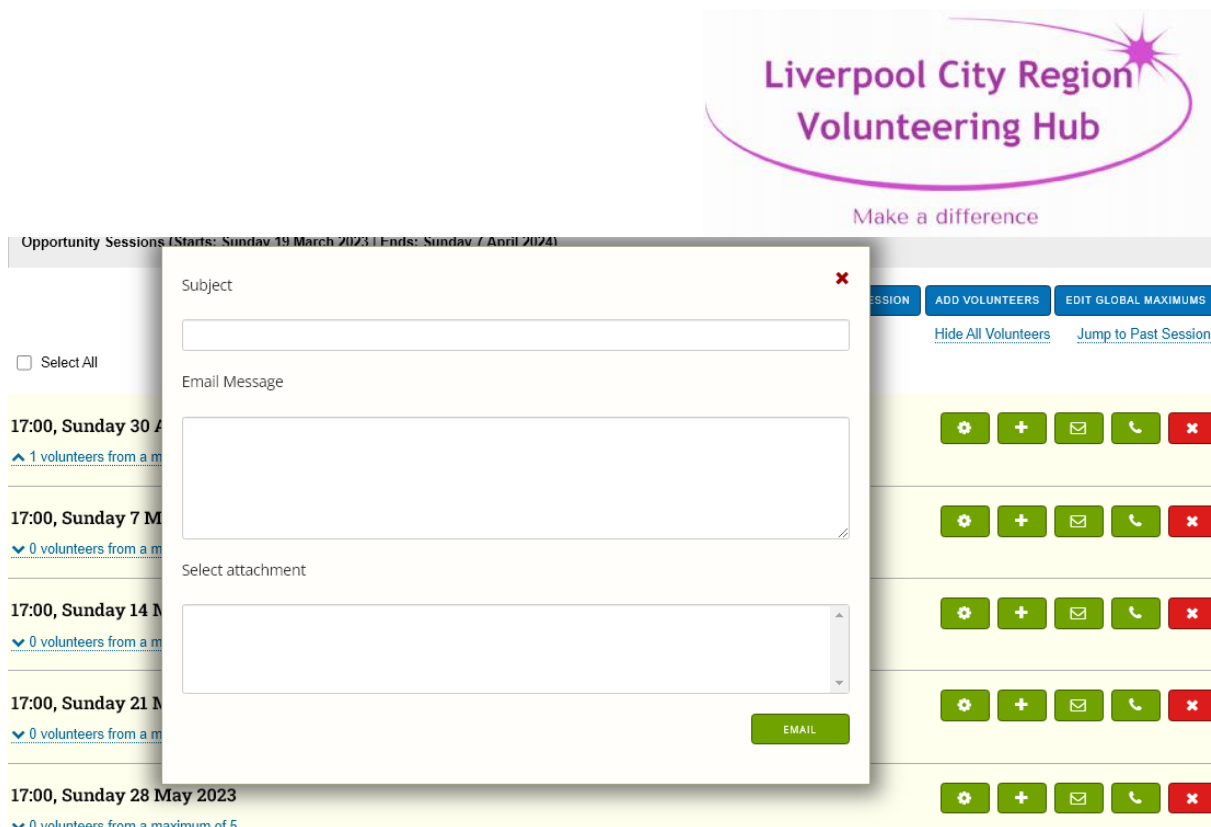
At the bottom of the modal are two buttons: 'SAVE' (green) and 'DELETE' (red).

The plus buttons mean you can add a volunteer. All you need to do is type the volunteer's name and as long as they are linked to your organisation or opportunity you should be able to add them. (see screenshot below)

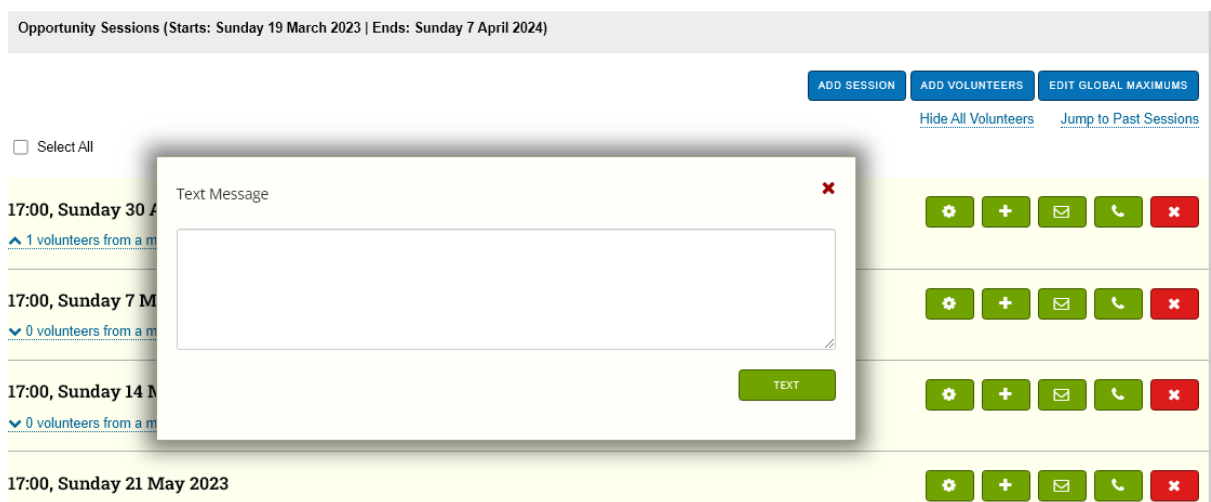
The screenshot shows the Liverpool City Region Volunteering Hub interface. At the top, there are buttons for 'ADD SESSION', 'ADD VOLUNTEERS', and 'EDIT'. Below these are links for 'Hide All Volunteers' and 'Jump to Past Sessions'. The main content area displays a list of sessions. A modal window is open for adding a volunteer. The modal has a title bar with a close button (X). It contains the following fields:

- Search:** A text input field with the placeholder 'Start typing then select your volunteer'.
- Add:** A green button labeled 'ADD'.

The envelop button gives you the option to email volunteers who are on that session. (see screenshot below)



The phone icon, gives you the option to send text messages to your volunteers. (see below screenshot)



The red X button gives you the option to delete the session.

Using sessions helps you to keep on top of your volunteer management and you can also make use of the day schedule (more of which later) where you can have an overview of you sessions.



Day Schedule

Select opportunity

Select Opp

Select event

Select Event

Select start and end dates

26/04/2023

to

03/05/2023

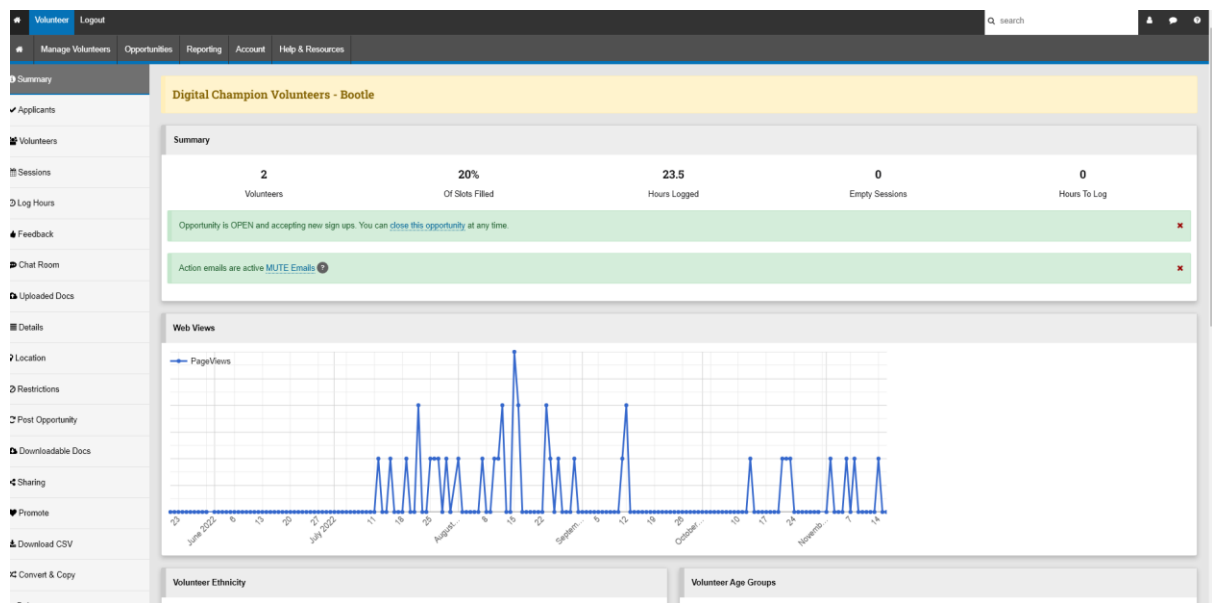
SEARCH

Schedule by Day (ALT)				
Wednesday, 26 April 2023	Thursday, 27 April 2023	Friday, 28 April 2023	Saturday, 29 April 2023	Sunday, 30 April 2023
				17:00 - <a href="#">marshalls for charity Race in Bootle</a> ..... 4 empty of 5 slots
Monday, 1 May 2023	Tuesday, 2 May 2023	Wednesday, 3 May 2023		
09:00 - <a href="#">Volunteer shopper - Southport</a> ..... 10 empty of 10 slots				

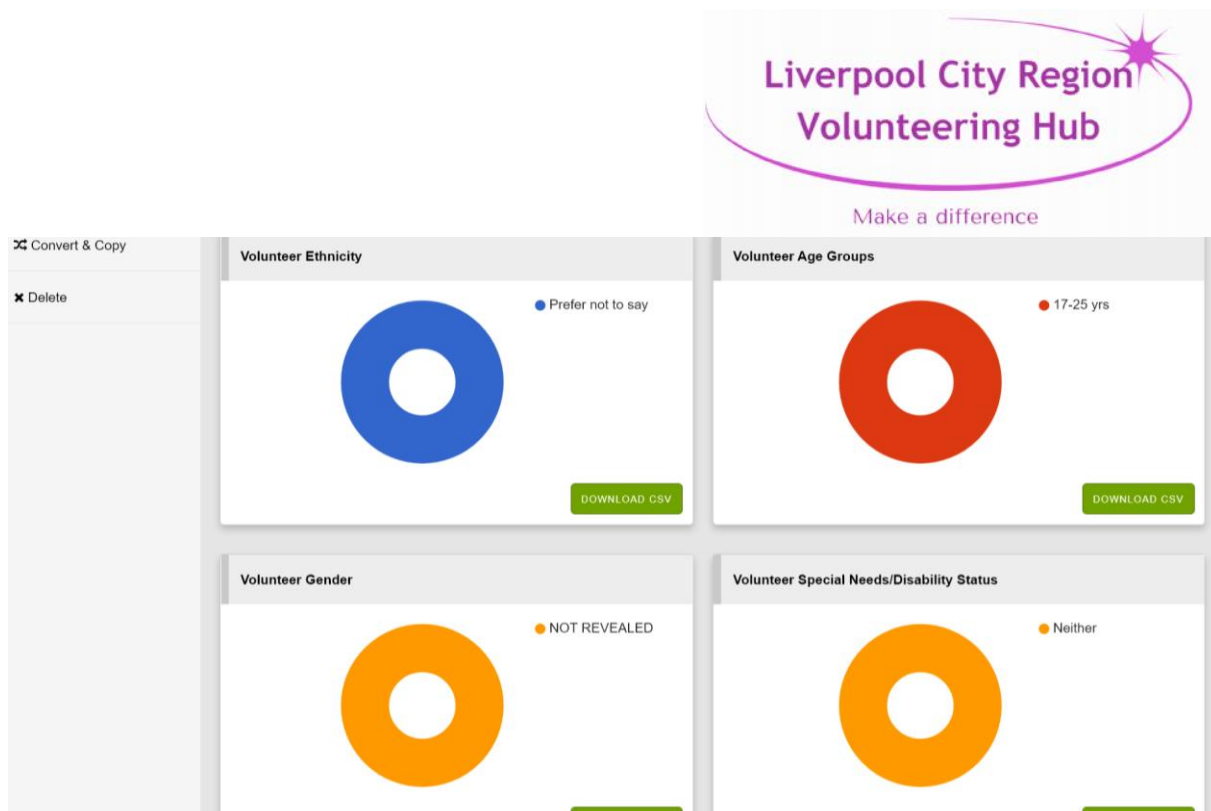
## How do I report on my opportunity?

On the opportunity dashboard, you will be able to see the stats on your opportunity. This area is particularly useful for providing evidence for economic value of activities to funders, providing reports for senior management etc.

You will be able to report on how many volunteers the opportunity has, how many slots are filled and the number of hours logged. You can also see the number of web views your opportunity page has had.



At the bottom of the page you will see various charts that show useful data about your opportunity, including: web traffic, volunteer ethnicity, volunteer age groups, volunteer gender, volunteer special needs/disability status and volunteer geographical area. Each of these charts can also be downloaded into a CSV file.



## Volunteers have applied for my opportunity what do I do?

When a volunteer applies to join one of your opportunities, you will receive an email notification. The email notification will go to the email address you have signed up to on Team Kinetic. In the email there will be a link which will take you to the volunteer who has applied. Another way to see your applicants is to log into Team Kinetic, click the “Opportunity” tab and click the ‘Applicants’ option on the left side of the page. If this is highlighted in red it signifies that there are applicants that you need to approve.

We recommend getting in touch with the volunteer and then taking them through your volunteer vetting process. When you click on the volunteer’s name you should be able to see their contact details.

Volunteer Logout

Manage Volunteers Opportunities Reporting Account Help & Resources

Summary

Applicants

Volunteers

Sessions

Log Hours

Details

Location

**Example Volunteer Opportunity**

New Applicants Awaiting Approval CLOSE APPLICATIONS

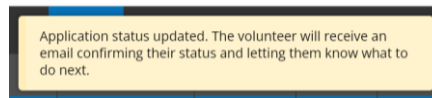
Download Results

Name	Date Applied	Mobile	Hours	Criminal Check	Support Required	Valid Email	
<a href="#">Example Volunteer</a>	21/04/2022 (0 days ago)	Example	0	✗	✓	✓	APPROVE DENY

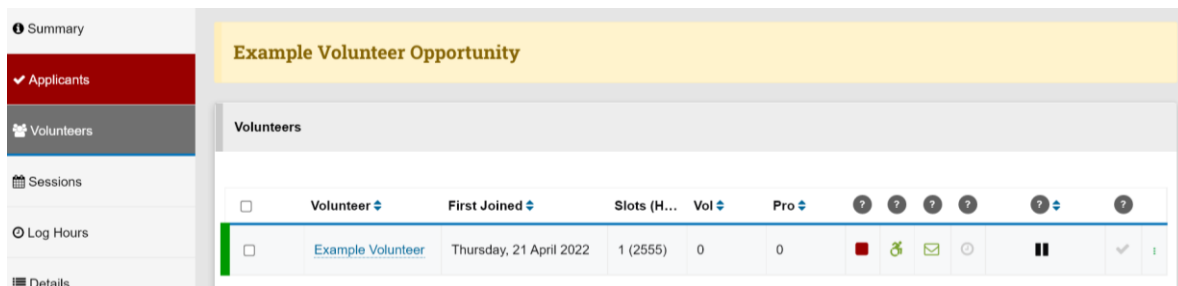
Once you have contacted the volunteer and decided whether you would like them to volunteer with your organisation you can then approve or deny the applicant. These buttons sit on the right side of



the page. A message will pop up to let you know that the volunteer has received an email letting them know that their application has been approved or not.

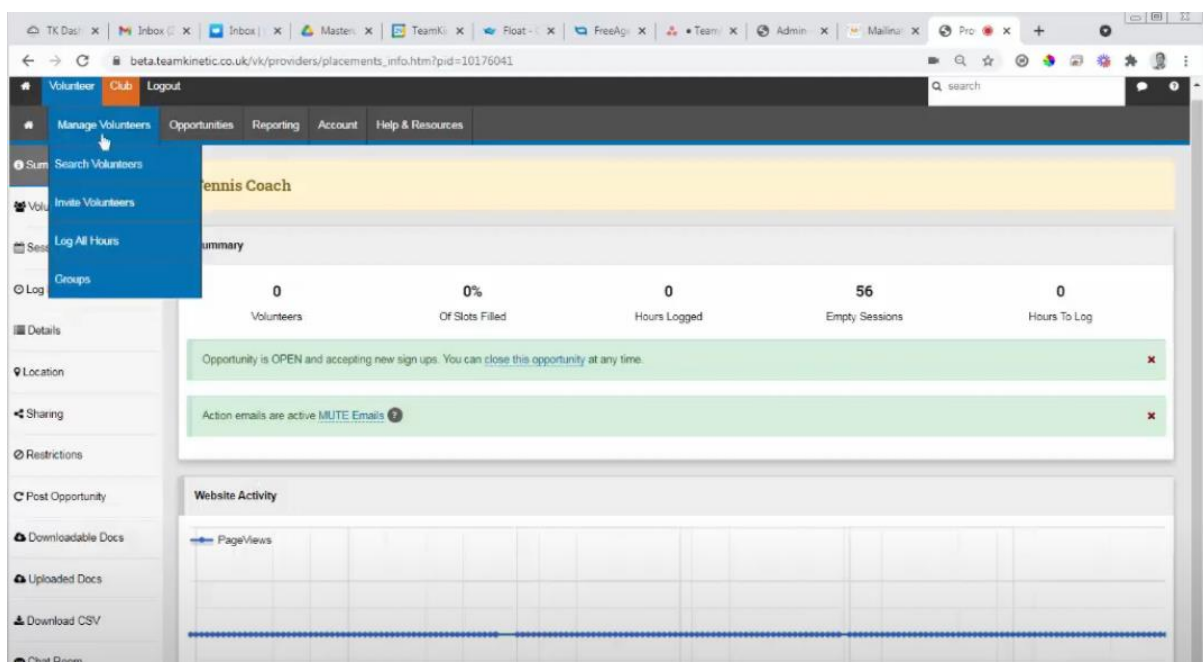


You will now see the volunteer appear under the 'Volunteers' section on the left side of the page.



## How do I invite volunteers to join my opportunity

If you would like to invite existing volunteers to join Team Kinetic go to: Manage volunteers – Invite volunteers. When inviting a volunteer this way they will be 'linked' to your organisation.



Then type or copy and paste the email address of the person you want to invite and press send. If you are sending to multiple emails, you can separate with a comma or you can upload from an excel spreadsheet.

Under invited volunteers, you can see who you've contacted and whether they have registered. If they have not registered they will have a red X. Once the volunteer has registered they will have a green tick.

To ask them to join your opportunity, you will need to email them a link to your opportunity page and ask them to join. We recommend doing this by sending an email to your volunteer saying you have invited them to Team Kinetic and you would like them to join your opportunity.

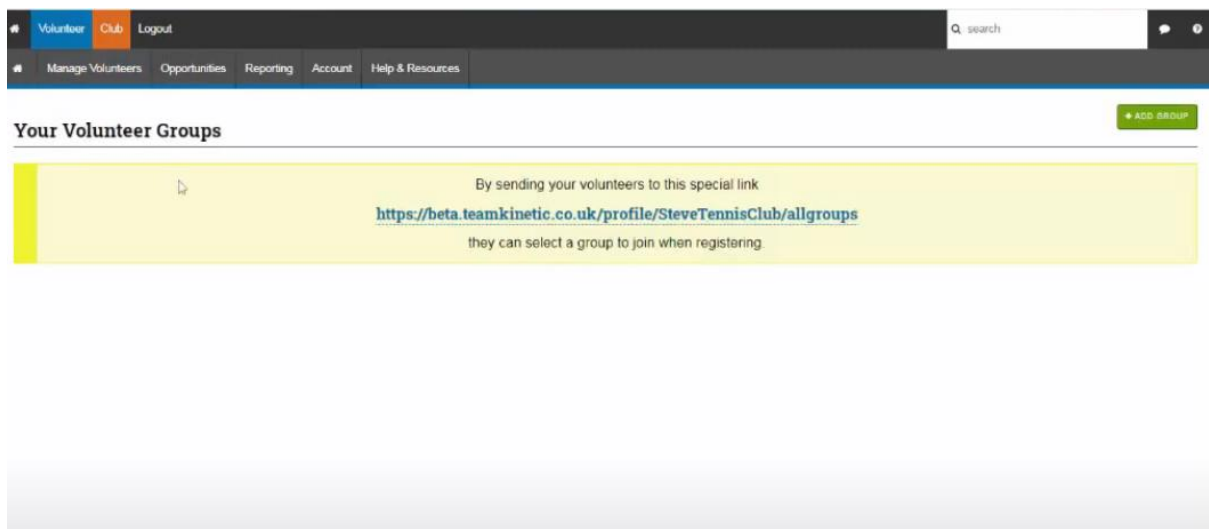
Email	Invited	Last Contacted	Registered
billbob@gmail.com	29 July 2021 (0)	29 July 2021 (0)	<div style="text-align: center;">X</div> <div style="text-align: right;">RE-INVITE</div>

## [Creating volunteer groups](#)

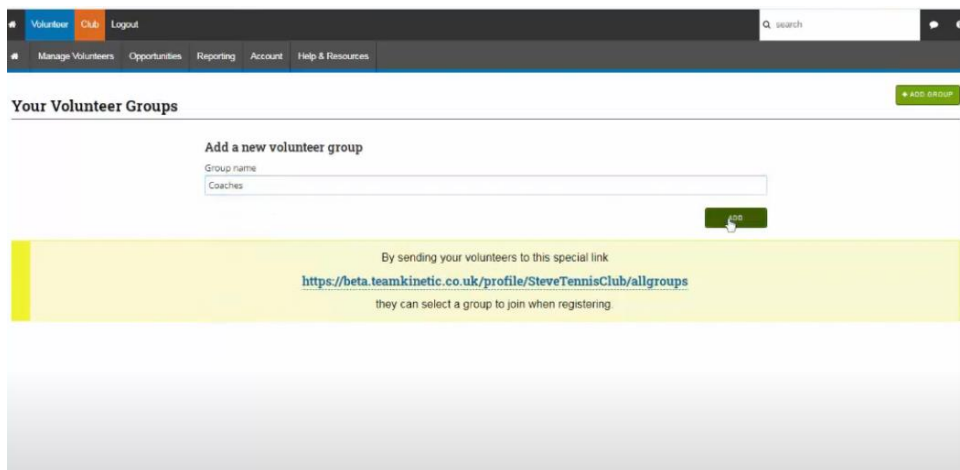


You may wish to create volunteer groups. This function is there so you can group certain volunteers and communicate with them easily. For example, you may have several groups of volunteers across Sefton and may only want to send a message to your Southport group.

To create a group you press the green '+ add group' button in the invited volunteers section.



Choose a name e.g. Southport Volunteers.



Once you have created the group you will need to add some volunteers into that group. To do this you go to **Manage volunteer - Search volunteers**

Then select your volunteers using the **tick box** then click on change group







## Logging volunteer hours

One of the benefits of Team Kinetic is its ability to be able to log volunteer hours. Both providers and volunteers will need to log hours. Both are needed for auditing purposes; however, the most important number comes from the provider hours. It is from the provider hours that all the reporting systems work.

The hour logging function is really helpful to see how many hours your volunteers have committed to the opportunity and thus the economic value of volunteers. Another reason to keep track of hours is to recognise volunteers for their commitment. If a volunteer has reached a milestone level of hours e.g. 50 or 100 hours you may want to give them some special recognition. Team Kinetic also has a reward badge function which we will look at later on.

## How do I get Volunteers to log hours?

Once a volunteer has taken part in an opportunity or session they can start to log hours. Volunteers can log hours via their own account. We have a guide to logging hours for volunteers you can share. For a more detailed look at how to encourage volunteers to log hour take a [look at this guide](https://teamkinetic.co.uk/blog/2021/07/19/how-to-get-your-volunteers-to-log-hours/). ( if link doesn't work copy and paste this URL into your browser <https://teamkinetic.co.uk/blog/2021/07/19/how-to-get-your-volunteers-to-log-hours/>)

## How do I log hours for volunteers?

You can log hours on behalf of a volunteer. However, you can only do this if the volunteer has registered on Team kinetic and have joined the opportunity you want to log time against.

**Step 1** – Go to the opportunity you want to log hours against

**Step 2** – Go to log hours

The screenshot shows the Team Kinetic web interface. On the left sidebar, the 'Log Hours' option is circled. The main content area displays a 'Demo Opportunity 17.01.2023'. Below the header, a green banner states 'Applications are currently OPEN for this opportunity' with a 'CLOSE APPLICATIONS' button. Under 'New Applicants Awaiting Approval', there is a 'Download Results' button and a table with columns: Name, Date Applied, Mobile, Hours, Criminal Check, Support Required, Valid Email, and Pending. Below this, another green banner states 'Approved Applicants (that have not yet joined a session)' followed by a table with columns: Name, Date Applied, Mobile, Hours, Criminal Check, Extra Support, and Valid Email.

**Step 3** – Choose the volunteer you want to log hours for. When you log hours on behalf of a volunteer you will need to choose either the thumbs up or thumbs down and leave feedback.

**Step 5** – You can then log the hours your volunteer has done.

You can also view logging history. This will show you the hours you have logged as a provider and any hours your volunteer has logged.

### [My volunteers have logged hours now what do I do?](#)

As a provider, you will need to match the hours your volunteer has done. As mentioned above this is important due to auditing and reporting purposes.

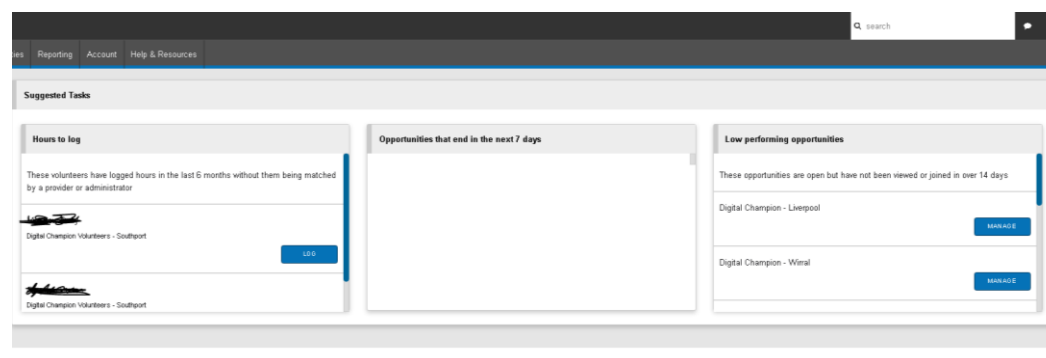
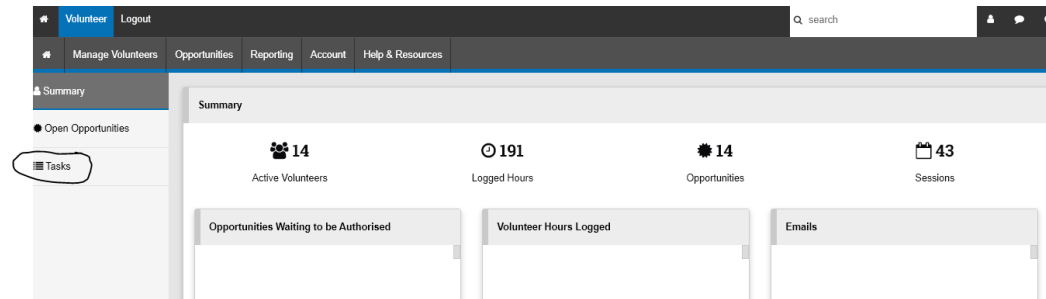
**Step 1** - To start logging hours as a provider, go the “Log Hours” page on the opportunity you wish to log hours for. You will see a list of volunteers that you need to log hours for.

**Step 2** - Before you can log hours, you will need to leave feedback (e.g. say thank you for their time) for the volunteer. You can then record the number of hours a volunteer has done on a particular date.

This page will also display any previously logged hours for that opportunity and shows the number logged by the volunteer and the number logged by you.

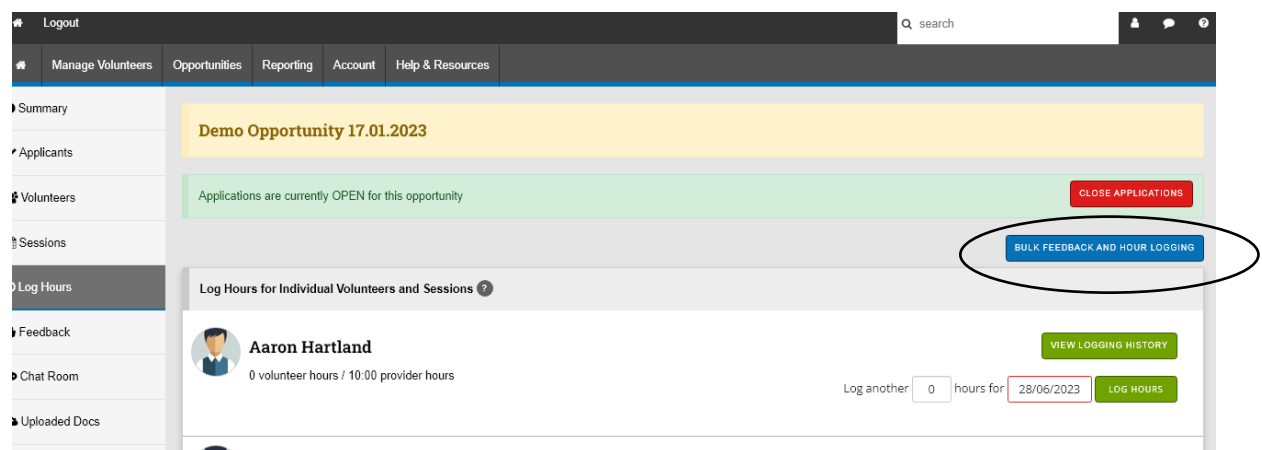


If a volunteer has logged hours, and you need to match them a notification will come up in the tasks section. You can then press on the log button to log hours.



## Logging bulk hours

You will see an option to log bulk hours. This option lets you give feedback to all your volunteers who have logged hours against the opportunity and to log their hours all in one go.



**Step 1** – Click on bulk feedback on hour logging button

The screenshot shows the Liverpool City Region Volunteering Hub interface. At the top, the logo reads "Liverpool City Region Volunteering Hub" with the tagline "Make a difference". Below the logo is a navigation bar with links: Manage Volunteers, Opportunities, Reporting, Account, and Help & Resources. On the left is a sidebar menu with options: Summary, Applicants, Volunteers, Sessions, Log Hours (highlighted), Feedback, Chat Room, Uploaded Docs, and Details. The main content area is titled "Digital Champion - Sefton" and contains a form titled "Bulk Log Hours and Feedback for Flexible Opportunity". The form has a text input field with the placeholder "Please leave a few comments as feedback for the volunteers you are about to log hours for". Below the input field is a note: "Feedback and a ThumbsUp will be added to all volunteers that do not currently have any feedback for this opportunity." At the bottom right of the form are two buttons: "LOG FEEDBACK AND MATCH LOGGED HOURS" (green) and "LOG ONLY FEEDBACK" (blue).

**Step 2-** Write your feedback. Remember this is going to all volunteers who have logged hours on that opportunity. You have the option to log feedback and match logged hours or you can send feedback only.

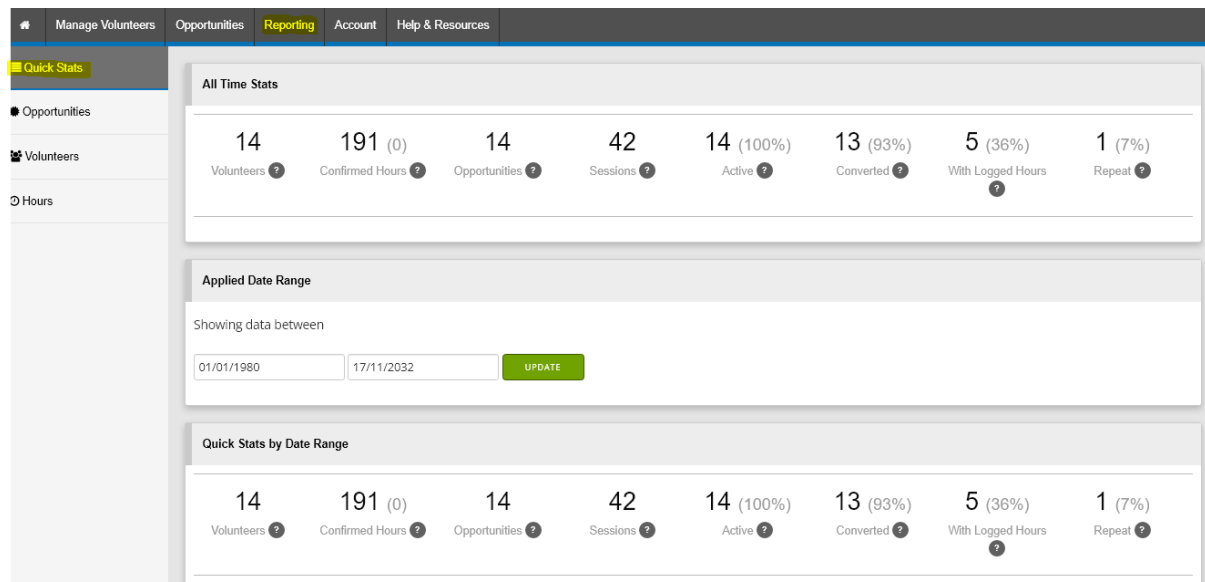
**Step 3** – Once you’ve pressed log feedback and match logged hours. All hours logged by the volunteers will be matched.

You can find a video on how to log hours as a provider under **help & resources > video tutorials**



## Reporting and Analysis

One of the big advantages of Team Kinetic is being able to report on your volunteering activities. We have already looked at how you can report on an individual opportunity and will now look at reporting on all of your opportunities and volunteers as a whole.

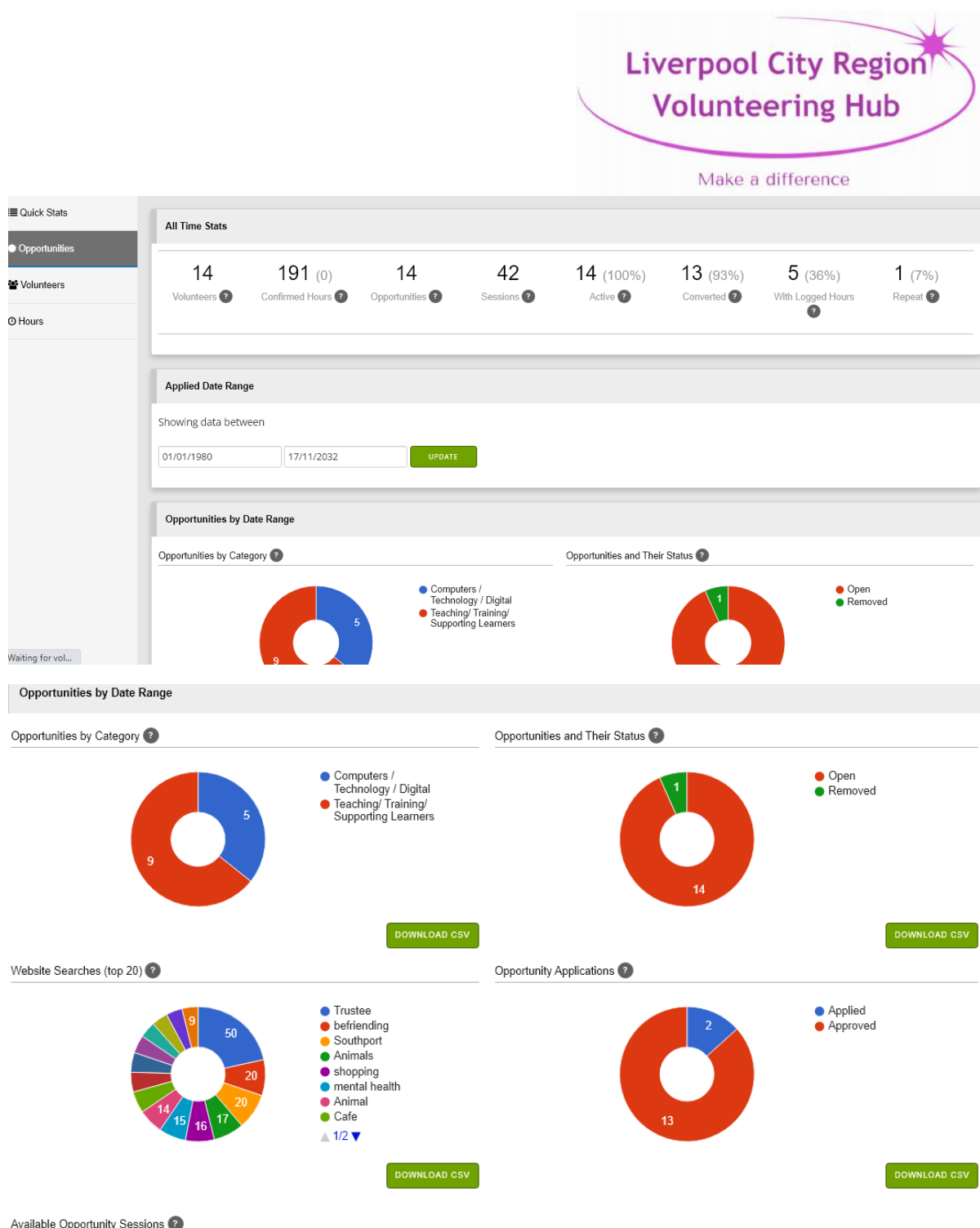


**Step 1** - When you click on **Reporting > Reports & Analysis** you will be brought to the above page. These stats will give you a general overview for your organisation. To find out more about each stat click on the ? symbol.

**Step 2**- Under 'quick stats by date range'. Here you can change dates to cover whatever period needed. E.g. weekly, monthly, quarterly. (perfect for showing funders what the value of your volunteering activity is)

## Reporting on all Opportunities

In the tap you can see the stats for all your opportunities. You can see all time stats as well as donut charts for all your opportunities. The doughnut charts can be customised by date range.



The doughnut charts will show:

- Opportunity by category - this shows the categories you've put your opportunity under when you created the opportunity e.g. administration, marketing etc.
- Opportunities and their status – this shows how many opportunities you have open, closed or removed.
- Website searches – this shows popular web searches across the whole of Team Kinetic
- Opportunity applications – this shows the numbers of approved and declined volunteers as well as the number of those that are in the application process.

For more information on each table click on the ? symbol.

You will also be able to see the following tables:

- Available opportunity sessions – if your opportunity is session based you will be able to see the number of sessions available.
- Opportunity logged hours – the number of hours logged on each opportunity
- Opportunity tags – the number of opportunities and hours logged against each tag

#### Available Opportunity Sessions ?



[DOWNLOAD CSV](#)

#### Opportunity Logged Hours ?

Opportunity	Vol Count	Vol Hours	Pro Hours	Views
<a href="#">Digital Champion - St Helens</a>	1	114	114	30
<a href="#">Digital Champion Volunteers - Southport</a>	2	31	31	52
<a href="#">Digital Champion Volunteers - Bootle</a>	1	21.5	23.5	45
<a href="#">Digital Champion - Sefton</a>	1	22	22	123

#### Opportunity Tags ?

Tag	Opportunity Count	Hours Logged
computer volunteer	4 (14.81%)	0 (%)
Computers	4 (14.81%)	0 (%)
Technology	4 (14.81%)	0 (%)
Tech Support	3 (11.11%)	0 (%)
Digital	2 (7.41%)	0 (%)

The last table is active opportunity fulfillment. This means the numbers and percentages of fulfillment of opportunities that have not ended yet. This is most relevant if you have your opportunity set up with sessions rather than flexible.

#### Active Opportunity Fulfillment ?

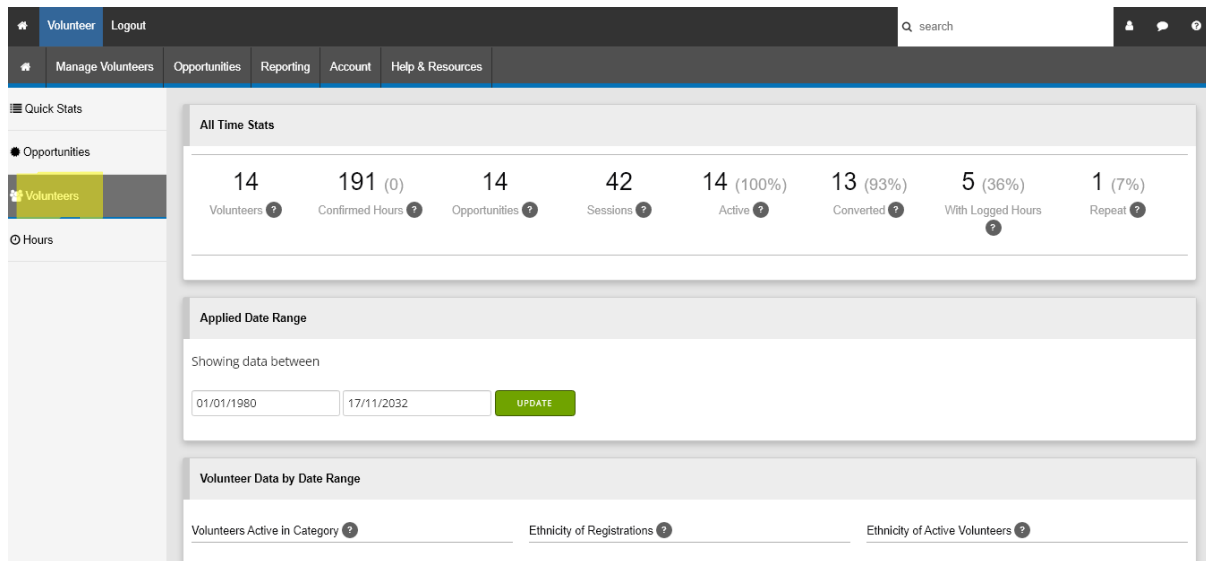
Opportunity	Slots	Filled	Empty	Percent
<a href="#">Digital Champion - Sefton</a>	15	4	11	27
<a href="#">Digital Champion Volunteers - Southport</a>	10	3	7	30
<a href="#">Digital Champion - Liverpool</a>	15	2	13	13
<a href="#">Digital Champion Volunteers - Bootle</a>	10	2	8	20
<a href="#">Digital Champion - St Helens</a>	15	1	14	7
<a href="#">Digital Champion - Halton</a>	15	1	14	7
<a href="#">Digital Champion - Netherton</a>	2	1	1	50
<a href="#">Digital Champion, Brian Charity x Include-IT Mersey, Liverpool (L3)</a>	2	0	2	0
<a href="#">Digital Champion - Knowsley</a>	15	0	15	0
<a href="#">Brain Charity, Liverpool (L3)</a>	2	0	2	0
<a href="#">Digital Champion, Strand By Me x Include-IT Mersey, Bootle (L20)</a>	58	0	58	0



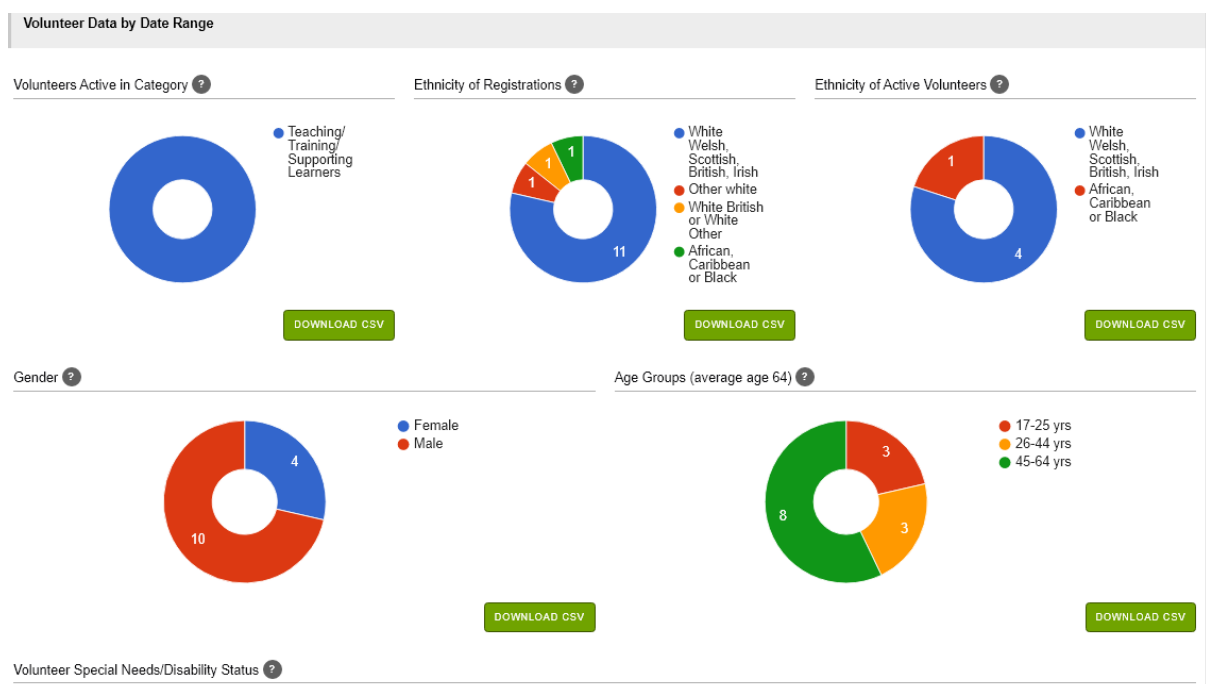


## Volunteer reporting

In the “Volunteers” tab you can see the stats for all of your volunteers. You can see all time stats as well as doughnut charts for all your volunteers. The doughnut charts can be customised by date range.

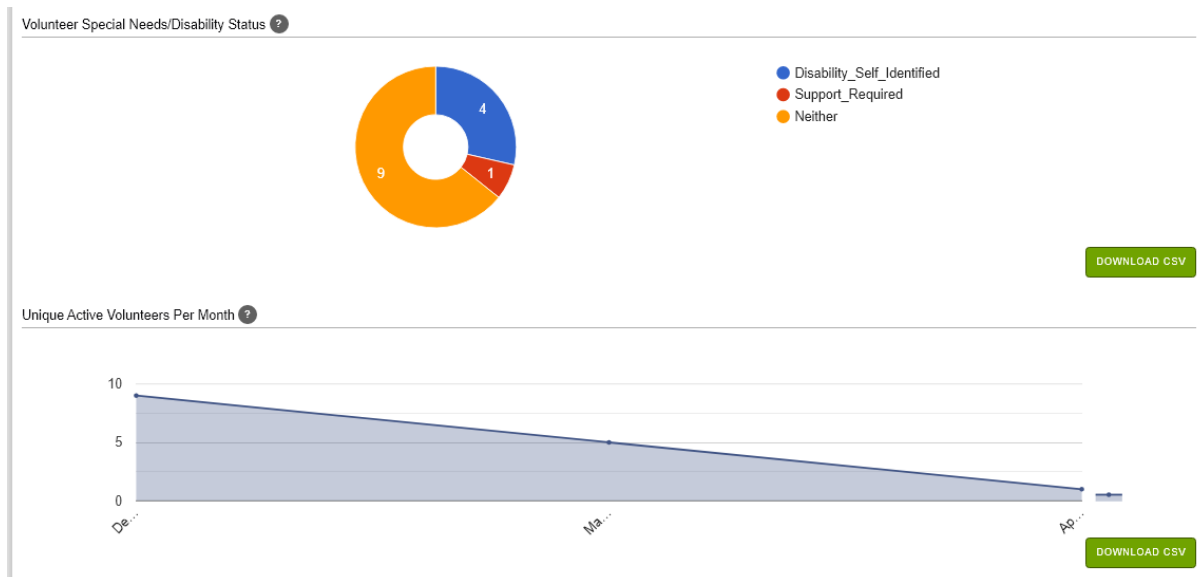


Below are the doughnut charts that show you the make-up of your volunteer cohort. This is particularly useful for looking at how diverse your group of volunteers are and if you are missing any particular type of volunteer. You can then look at ways to encourage these volunteers to apply, e.g. recruiting more older people if you only have volunteers in younger age ranges.



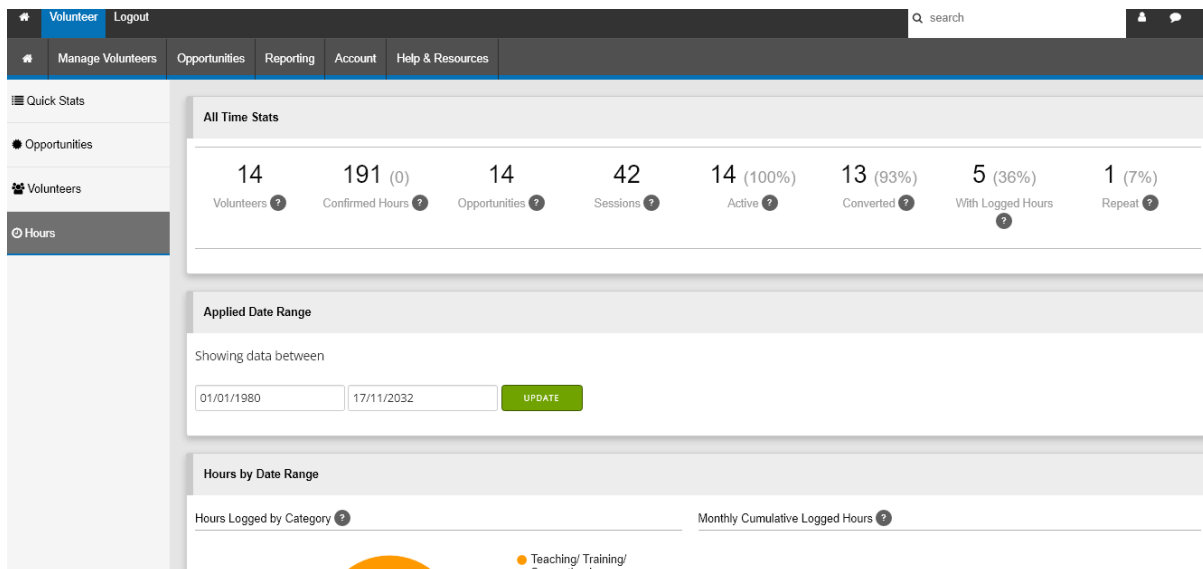


You can also see a chart showing you how many unique active volunteers you have per month.



## How do I report volunteer hours?

In the “Hours” tab you can see the stats for all hours. You can see all time stats as well as doughnut charts for volunteer hours. The doughnut charts can be customised by date range.





## [Day schedule](#)

Under the Day schedule tab (Reporting>Day schedule) you will be able to see all the scheduled sessions you have. You can customise this by opportunity, event and date. This page will only be populated if your opportunities were set up under 'Individual sessions'.

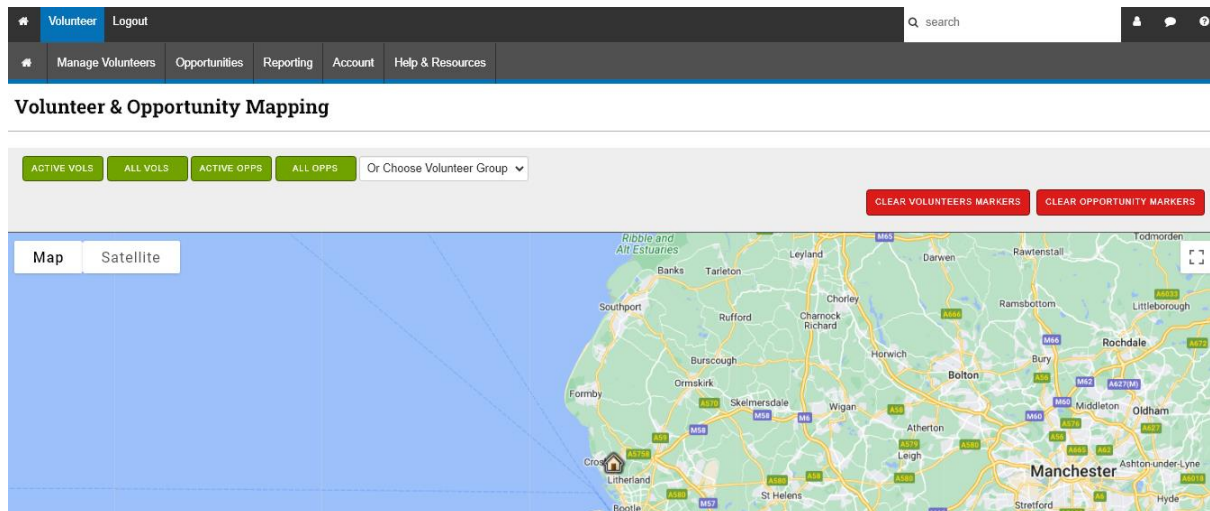
## [Reporting on Feedback](#)

Under the Feedback tab (Reporting > Feedback) you can see all the feedback that has been sent by your volunteers. You can choose to see it either via opportunities feedback or volunteer feedback. You can also download the results as an Excel file. This is great to find quotes to encourage other people to volunteer for you or to include in reports.



## [Maps](#)

Under **Reporting>Maps**, you will be able to see all of your opportunities, volunteers or sessions on a Google map.



## [Volunteer LCR contact](#)

If you have any issues or would like to book a one to one session to help with Team Kinetic queries please contact us via our [contact page here](#):

[volunteeringlcr.org](http://volunteeringlcr.org)