

# Team Kinetic User

# Guide - Organisations

## Contents

Organisation Guide .....	4
How to use this guide .....	4
How to register your organisation? .....	4
How to log in once you've registered? .....	7
Adding colleagues to your team kinetic account.....	7
Creating a volunteering opportunity .....	8
How to create an advert for your volunteering opportunity?.....	8
Creating a customised email.....	13
How to create sessions .....	18
Flexible opportunities .....	19
How to create an event?.....	20
Creating an opportunity as part of an event .....	20
Adding an existing opportunity to an event .....	21
How do I manage & edit an opportunity? .....	22
How to manage sessions?.....	23
How do I report on my opportunity?.....	28
Volunteers have applied for my opportunity what do I do? .....	29
How do I invite volunteers to join my opportunity .....	30
Creating volunteer groups .....	31
Logging volunteer hours .....	34
How do I get Volunteers to log hours? .....	34
How do I log hours on behalf of my volunteer? .....	34
My volunteers have logged hours now what do I do?.....	35
Logging bulk hours .....	36
Reporting and Analysis.....	38
Reporting on all Opportunities .....	38
Volunteer reporting .....	42
How do I report volunteer hours? .....	43
Day schedule .....	44
Reporting on Feedback .....	44
Maps .....	45
Volunteer Centre contacts.....	45

Liverpool City Region  
Volunteering Hub

Make a difference

## 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>

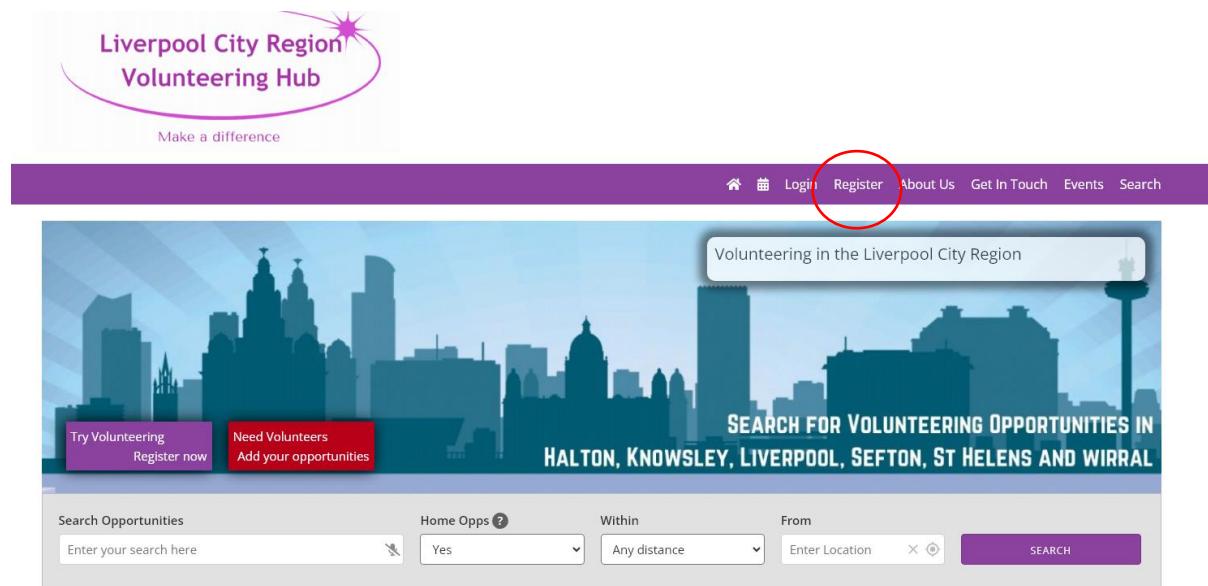
Last updated: 28/06/2023

### How to register your organisation?

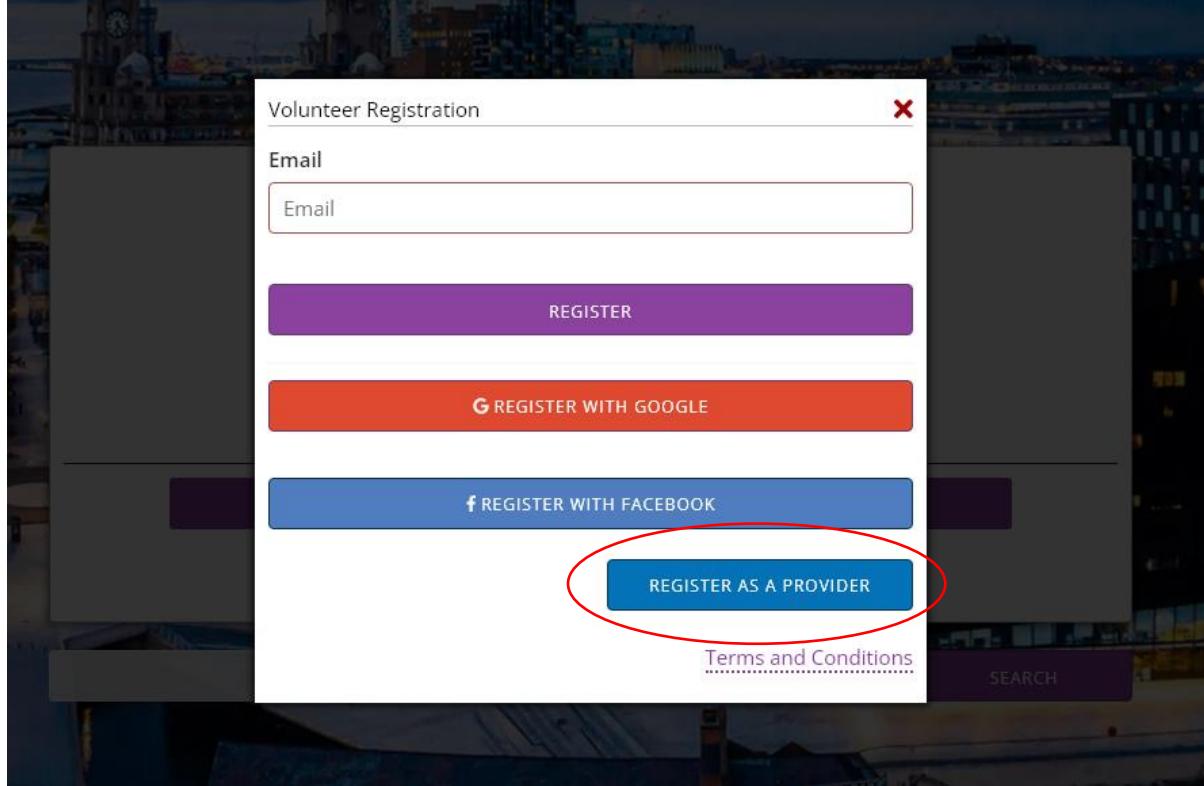
To start, create your Team Kinetic account by following the link on the home page of the Volunteer Centre website ([volunteeringlcr.org](http://volunteeringlcr.org)).

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://volunteercentrefeeton.teamkinetic.co.uk/volunteers/registration-provider>



Then click on register as a provider



Fill out the fields with your organisation's details.

Organisation Name

Contact Name Contact Email Address Contact Number

Select your country

United Kingdom

Enter postcode then hit search to find the address

SEARCH

Map showing locations in Manchester and Salford, including Pendleton, Salford, Salford Quays & Art Gallery, National Football Museum, Northern Quarter, Etihad Stadium, Philips Park, Salford, Salford Quays & Art Gallery, and Manchester City Jule Stadium.

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.



Make a difference

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@seftoncvs.org.uk](mailto:james.sherry@seftoncvs.org.uk))

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

Email

Password

**LOGIN**

**IN SIGN IN WITH LINKEDIN**

**G SIGN IN WITH GOOGLE**

Email

Password

**LOGIN**

**IN SIGN IN WITH LINKEDIN**

**G SIGN IN WITH GOOGLE**

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

A screenshot of the Liverpool City Region Volunteering Hub dashboard. The top navigation bar includes "Volunteer" (highlighted in blue), "Logout", "Manage Volunteers", "Opportunities", "Reporting", "Account", "Help &amp; Resources", and a search bar. The left sidebar has "Summary" (selected) and "Tasks" (disabled). The main content area is titled "Summary" and displays four key metrics: "Active Volunteers" (0), "Logged Hours" (0), "Opportunities" (0), and "Sessions" (0). Below these are two sections: "Opportunities Waiting to be Authorised" and "Volunteer Hours Logged", each with a list of items. At the bottom are two panels: "Chatter messages since you last logged on" and "What's been happening since you last logged on".

## How to log in once you've registered?

Once you have set up and verified your account you can [log in here](#).

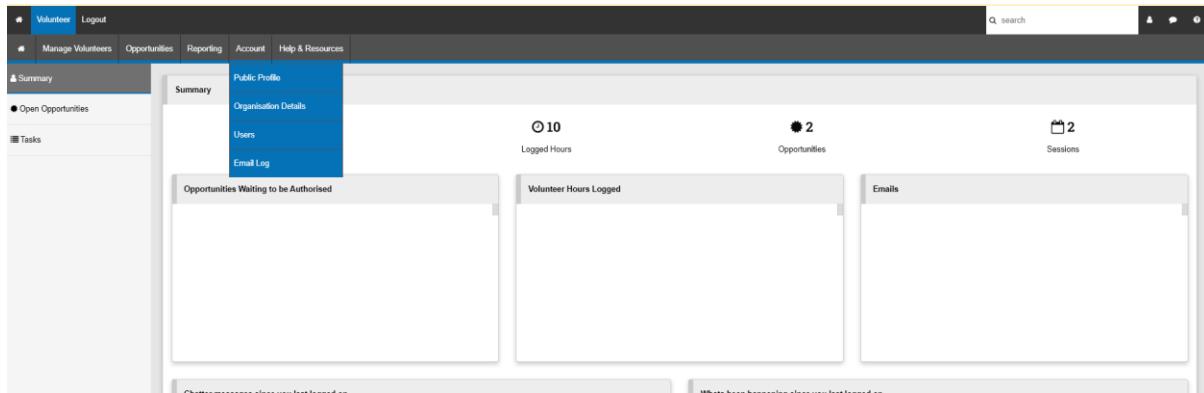
<https://volunteercentrefeeton.teamkinetic.co.uk/vk/providers/login.htm>

## Adding colleagues to your team kinetic account

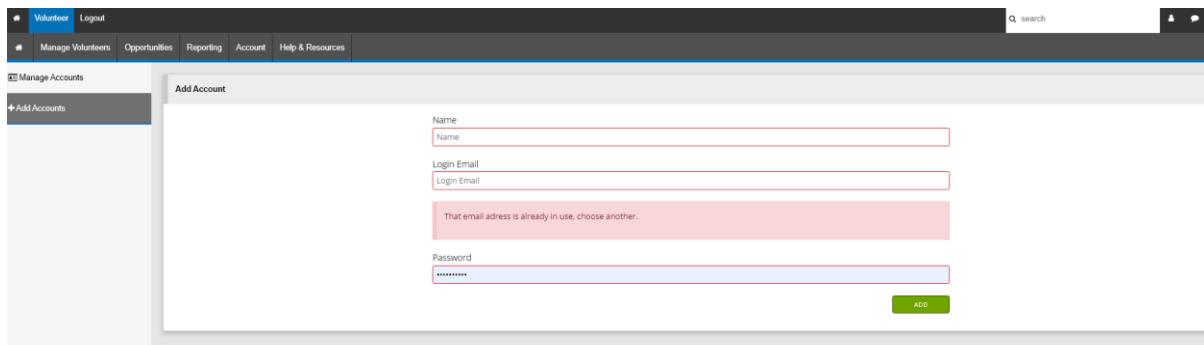
To add a colleague to your Team Kinetic account, follow these steps:

**Step 1:** Go to accounts

**Step2:** go to users



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

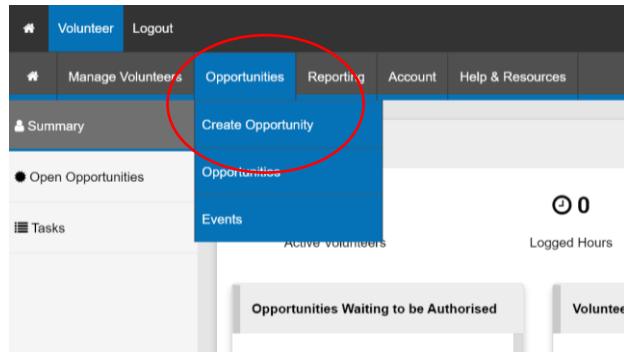


## Creating a volunteering opportunity

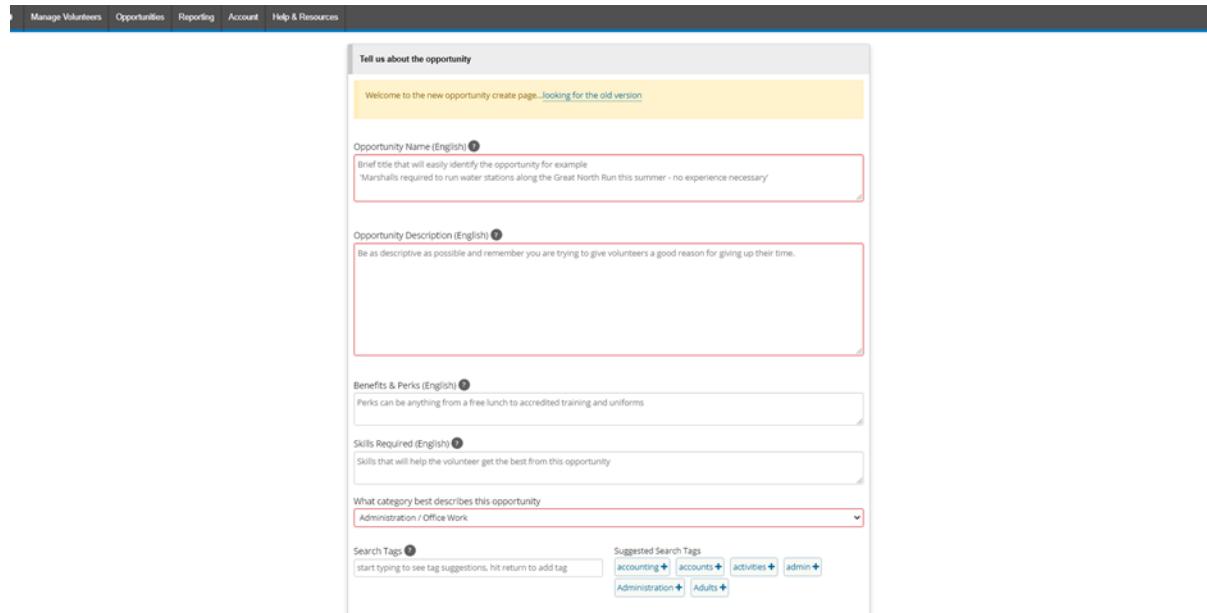
To be able to sign up volunteers you will need to create an advert or role description; this is called an opportunity.

### 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.



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 is 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



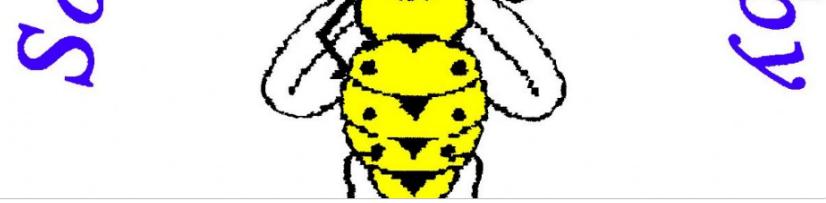
Upload a new image (1200 by 300 pixels is the perfect size)

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).



Finance/ Accounting/ Book Keeping > Southport & Formby Special Athletes

Treasurer for a small local charity providing sports activities for people with intellectual disabilities

Job summary: To provide sound financial advice to the Chair and trustees, maintain bookkeeping records and manage the financial assets of the Group.

Main responsibilities:

In addition to the responsibilities as a Trustee of the Charity.

Reconcile the accounts with the bank statements

Pay invoices using Internet banking and deposit cash.

Attend monthly meetings

Report ... [More details](#)

 admin  accounting  treasurer  book keeping  accounts  finance

**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.

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

Opportunity Application Process

Role required ?  
No Role

Do volunteers need to apply first ?  
Yes, volunteers can apply but must be

Ask for experience ?  
Yes

Send a customised email when joining this opportunity?

Create Custom Opportunity Email

Add Attachment - Upload  
None

**BACK** **NEXT**

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.

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**

**BACK**

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: 16      Maximum Age: leave blank for no maximum      Gender: Any      Maximum sessions: ? (leave blank for no maximum)

Must be linked to provider to join: **No**

**NEXT**

**BACK**

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? **No**

**NEXT**

**BACK**

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) ?

G

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.

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**

10 Occurrences
  On date

[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 ?
Start date ?
End date ?
Signup closes on ?
Maximum Time ?

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)

Volunteers	Of Slots Filled	Hours Logged	Empty Sessions	Hours To Log
0	0%	0	1	0
Volunteers	Of Slots Filled	Hours Logged	Empty Sessions	Hours To Log

Opportunity is CLOSED. This opportunity is awaiting authorisation.

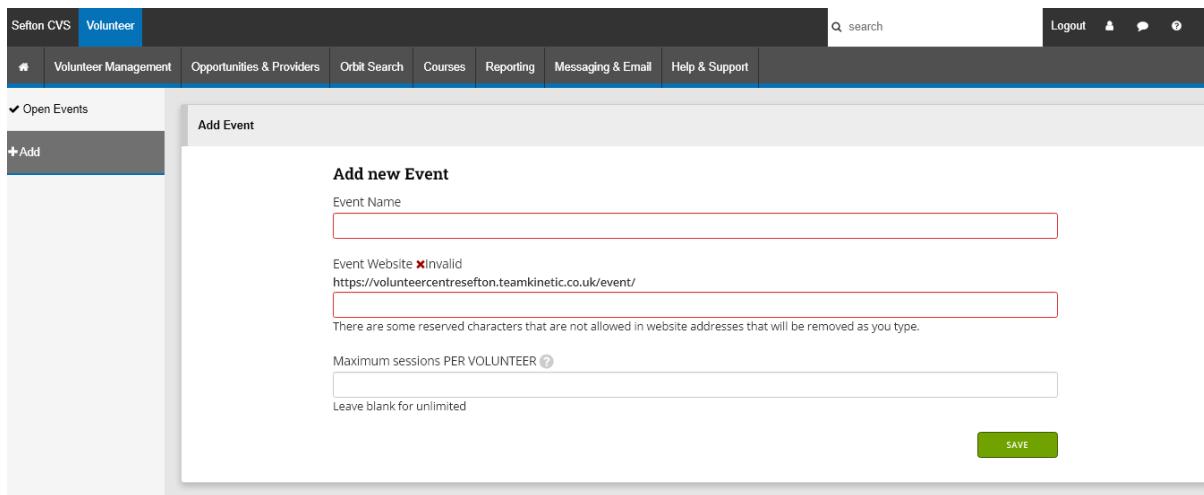
Action emails are active MUTE Emails

## 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 'Volunteer Management' section of the Liverpool City Region Volunteering Hub. The 'Events' tab is selected. A sub-menu on the left shows 'Open Events' and a 'Add' button. The main area is titled 'Add Event' and contains a sub-section titled 'Add new Event'. It has fields for 'Event Name' (a red box), 'Event Website' (a red box with an error message 'invalid https://volunteercentresetfton.teamkinetic.co.uk/event/'), and 'Maximum sessions PER VOLUNTEER' (a red box with the note 'Leave blank for unlimited'). A green 'SAVE' button is at the bottom right.

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

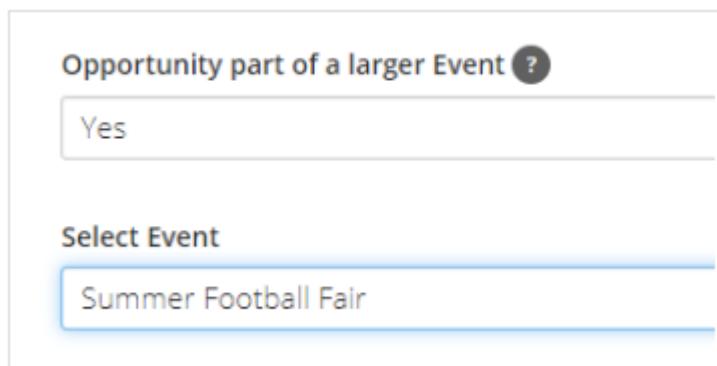
Next, you can either create a new opportunity to be part of the event, or add an existing opportunity to it.

## 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 the 'Create Opportunity' form. The first section is 'Opportunity part of a larger Event' with a 'Yes' button. The second section is 'Select Event' with a dropdown menu showing 'Summer Football Fair'.

**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**

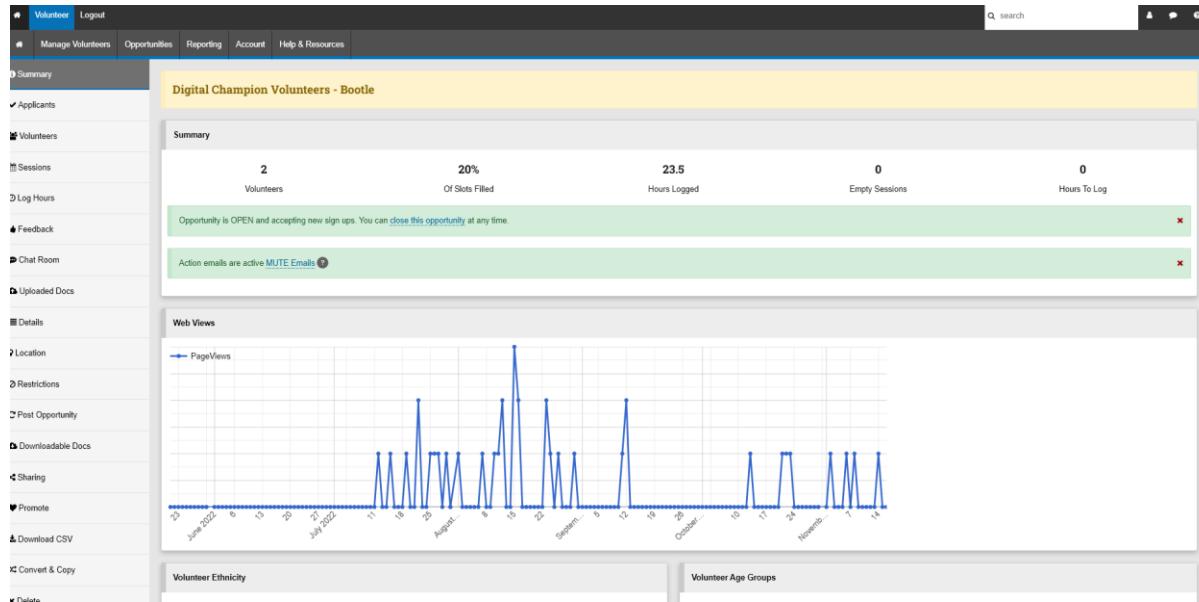
Travel Information  [View example](#)

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

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

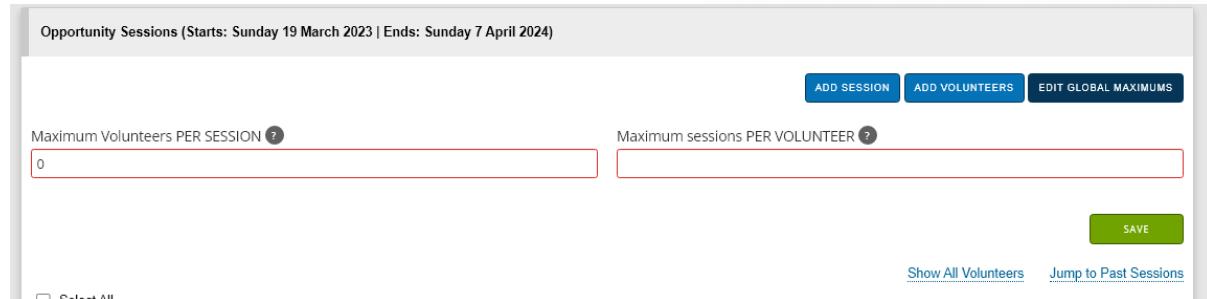


Make a difference

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

Maximum Volunteers PER SESSION  Maximum sessions PER VOLUNTEER

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



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)

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

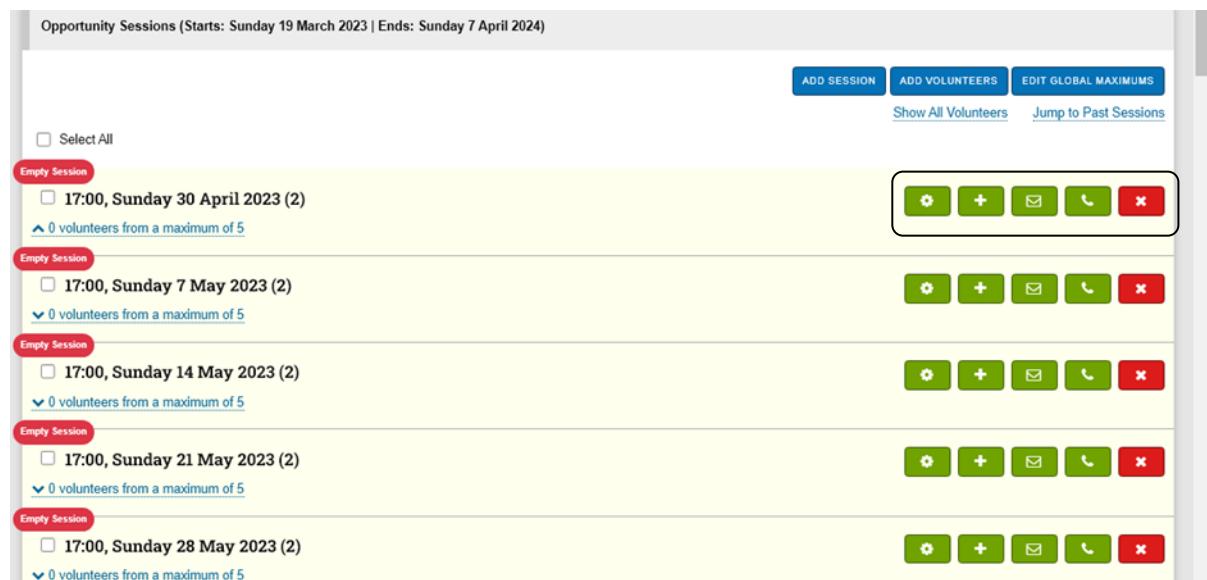
Empty Session  17:00, Sunday 30 April 2023 (2)  
 0 volunteers from a maximum of 5

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

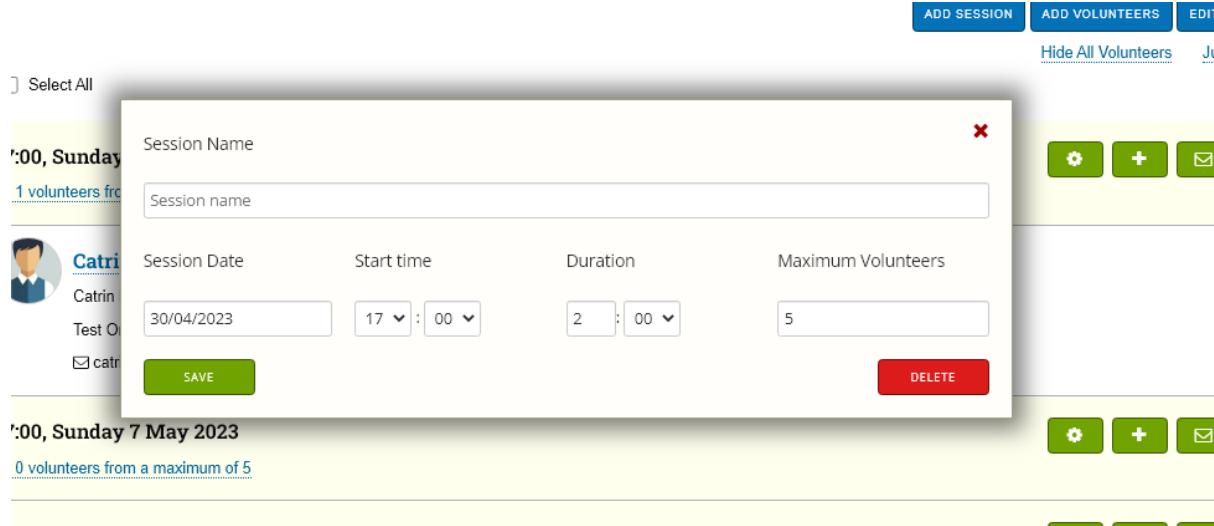
Empty Session  17:00, Sunday 21 May 2023 (2)  
 0 volunteers from a maximum of 5

Empty Session  17:00, Sunday 28 May 2023 (2)  
 0 volunteers from a maximum of 5



Make a difference

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



Session Name

Session Date Start time Duration Maximum Volunteers

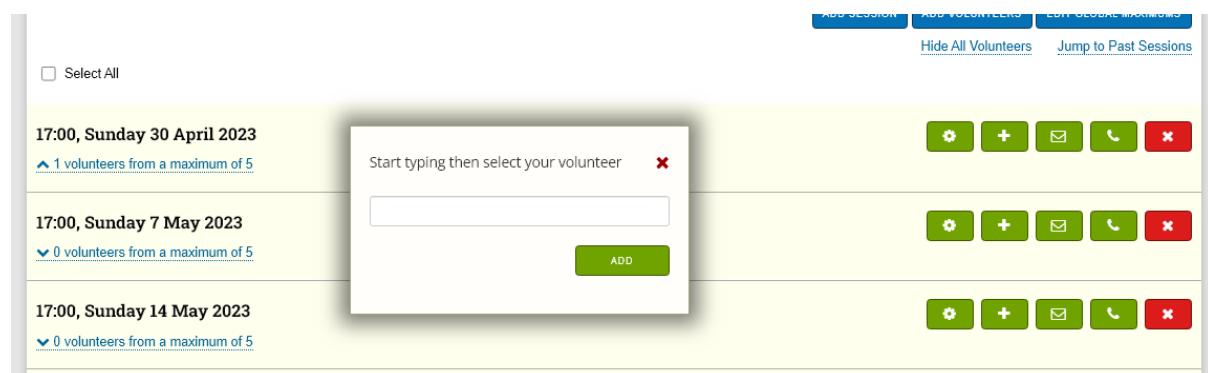
30/04/2023 17 : 00 2 : 00 5

SAVE DELETE

17:00, Sunday 7 May 2023

0 volunteers from a maximum of 5

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)



Start typing then select your volunteer

ADD

17:00, Sunday 30 April 2023

17:00, Sunday 7 May 2023

17:00, Sunday 14 May 2023

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

Make a difference

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

Subject  X

Select All

17:00, Sunday 30 April 2023 ▲ 1 volunteers from a maximum of 5

17:00, Sunday 7 May 2023 ▼ 0 volunteers from a maximum of 5

17:00, Sunday 14 May 2023 ▼ 0 volunteers from a maximum of 5

17:00, Sunday 21 May 2023 ▼ 0 volunteers from a maximum of 5

17:00, Sunday 28 May 2023 ▼ 0 volunteers from a maximum of 5

Email Message

Select attachment

EMAIL

SESSION ADD VOLUNTEERS EDIT GLOBAL MAXIMUMS  
Hide All Volunteers Jump to Past Session

(Four rows of green buttons with icons: gear, plus, envelope, phone, red X)

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

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

ADD SESSION ADD VOLUNTEERS EDIT GLOBAL MAXIMUMS

Select All

17:00, Sunday 30 April 2023 ▲ 1 volunteers from a maximum of 5

17:00, Sunday 7 May 2023 ▼ 0 volunteers from a maximum of 5

17:00, Sunday 14 May 2023 ▼ 0 volunteers from a maximum of 5

17:00, Sunday 21 May 2023 ▼ 0 volunteers from a maximum of 5

Text Message  X

TEXT

Hide All Volunteers Jump to Past Sessions

(Four rows of green buttons with icons: gear, plus, envelope, phone, red X)

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 your sessions.

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### Day Schedule

Select opportunity	Select event	Select start and end dates	<input type="button" value="SEARCH"/>
Select Opp	Select Event	26/04/2023 <input type="button" value="to"/> 03/05/2023 <input type="button" value=""/>	

#### Schedule by Day (ALT)

Wednesday, 26 April 2023

Thursday, 27 April 2023

Friday, 28 April 2023

Saturday, 29 April 2023

Sunday, 30 April 2023

Monday, 1 May 2023  
09:00 - [Volunteer shopper - Southport](#)  
...

Tuesday, 2 May 2023

Wednesday, 3 May 2023

17:00 - [marshalls for charity Race in Bootle](#)  
4 empty of 5 slots

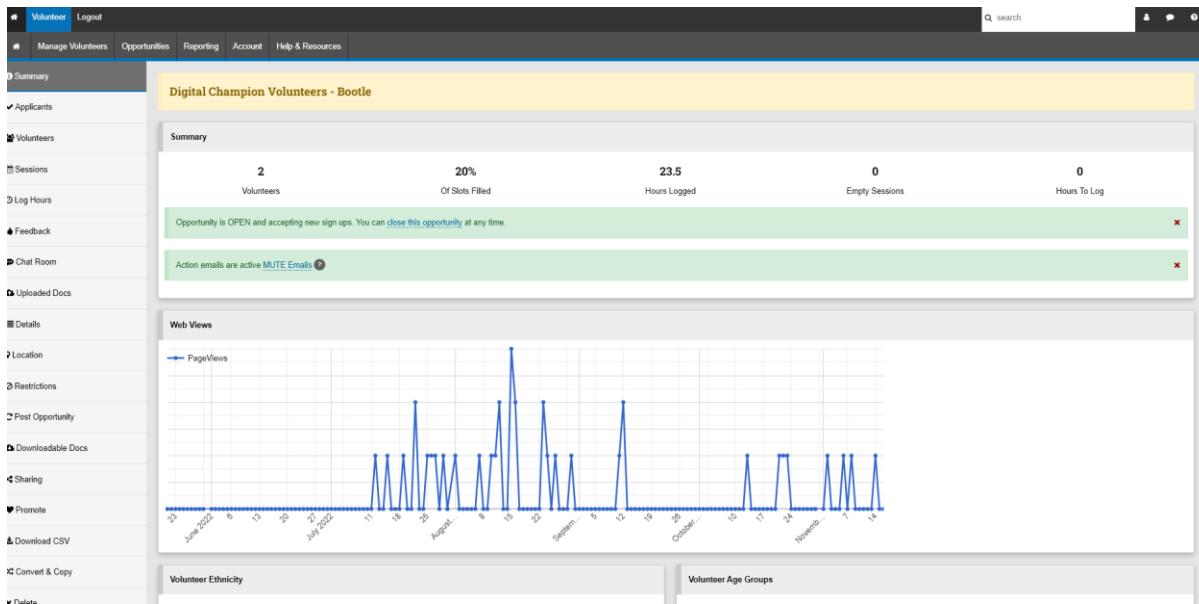
10 empty of 10 slots

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## How do I report on my opportunity?

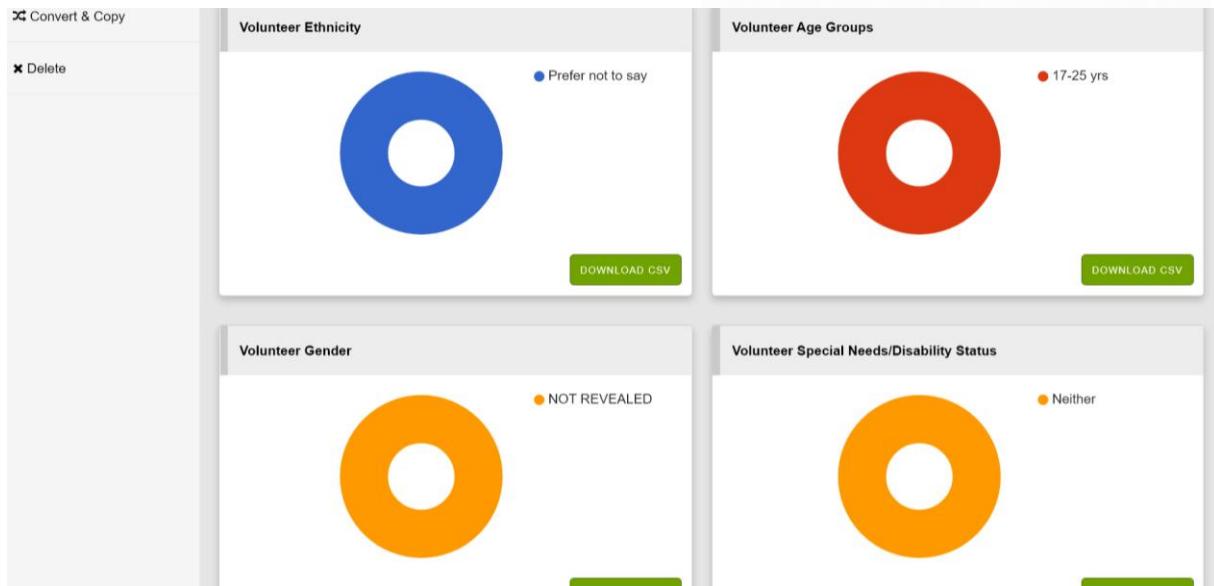
On the opportunity dashboard, you will be able to see the stats on your opportunity. This area is particularly useful for providing evidence for economic value of activities to funders, providing reports for senior management etc.

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.

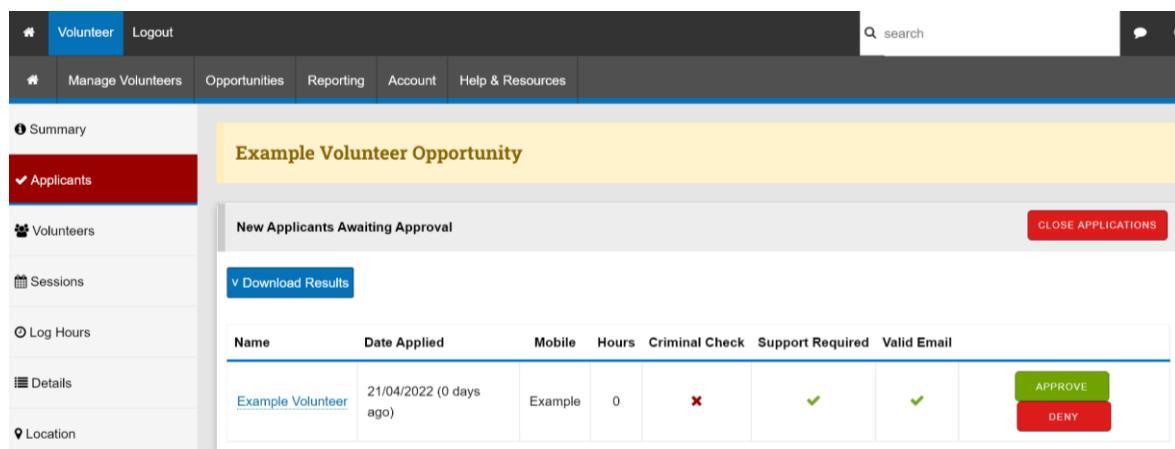
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### Volunteers have applied for my opportunity what do I do?

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.

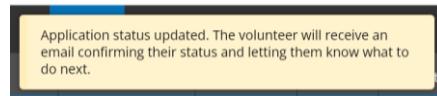


The screenshot shows the Team Kinetic application interface. The top navigation bar includes 'Volunteer' (selected), 'Logout', 'Manage Volunteers', 'Opportunities', 'Reporting', 'Account', 'Help & Resources', and a search bar. The left sidebar has links for 'Summary', 'Applicants' (highlighted in red), 'Volunteers', 'Sessions', 'Log Hours', 'Details', and 'Location'. The main content area is titled 'Example Volunteer Opportunity' and shows 'New Applicants Awaiting Approval'. A table lists an applicant named 'Example Volunteer' with details: Date Applied (21/04/2022 (0 days ago)), Mobile (Example), Hours (0), Criminal Check (✗), Support Required (✓), and Valid Email (✓). Action buttons 'APPROVE' and 'DENY' are on the right.

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

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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.

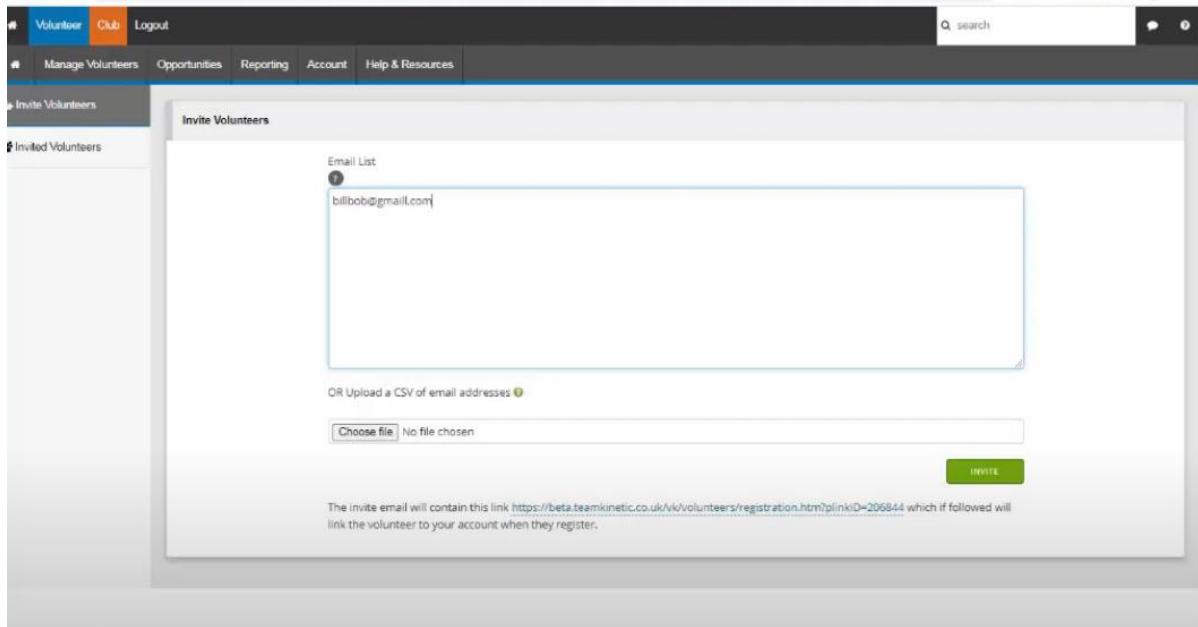
Volunteer	First Joined	Slots (H...)	Vol	Pro	?	?	?	?	?	?	?
Example Volunteer	Thursday, 21 April 2022	1 (2555)	0	0							

## 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.

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Invite Volunteers

Email List

billbob@gmail.com

OR Upload a CSV of email addresses ?

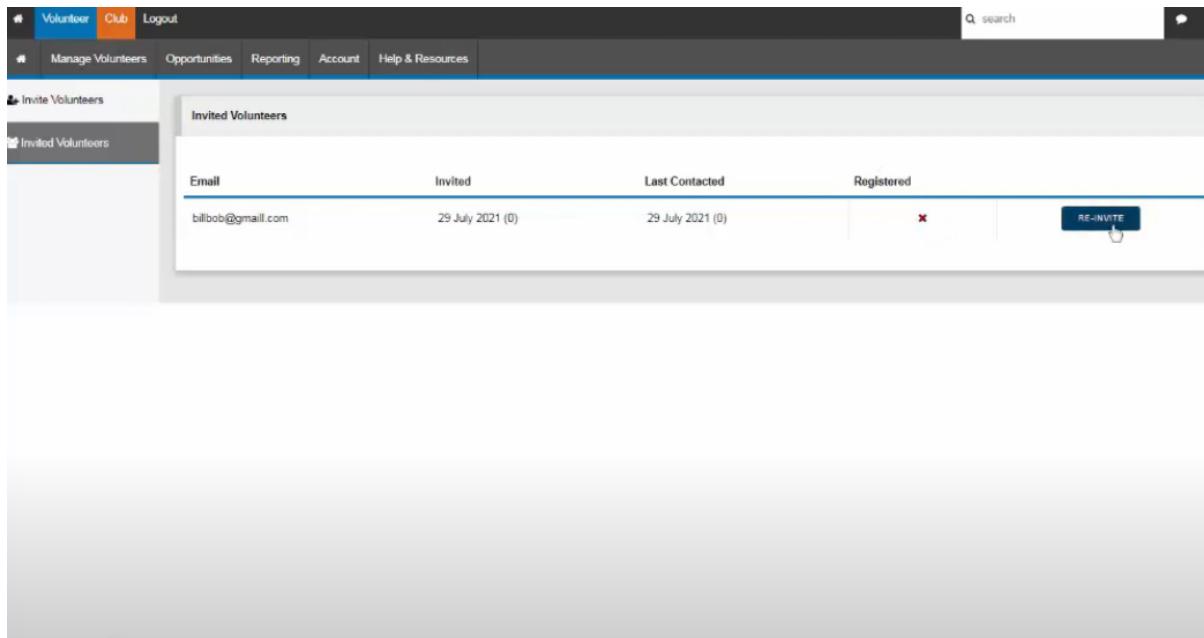
Choose file No file chosen

INVITE

The invite email will contain this link <https://beta.teamkinetic.co.uk/volunteers/registration.htm?plink=D=206844> which if followed will link the volunteer to your account when they register.

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)	<span style="color: red;">X</span> RE-INVITE

## Creating volunteer groups

Make a difference

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.

By sending your volunteers to this special link  
<https://beta.teamkinetic.co.uk/profile/SteveTennisClub/allgroups>  
they can select a group to join when registering.

+ ADD GROUP

Choose a name e.g. Southport Volunteers.

Add a new volunteer group

Group name:

+ ADD GROUP

By sending your volunteers to this special link  
<https://beta.teamkinetic.co.uk/profile/SteveTennisClub/allgroups>  
they can select a group to join when registering.

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



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The screenshot shows the 'Search Volunteers' page of the Liverpool City Region Volunteering Hub. At the top, there is a navigation bar with links for 'Manage Volunteers', 'Opportunities', 'Reporting', 'Account', 'Help & Resources', and a user icon. Below the navigation is a search bar with a placeholder 'name/email' and a 'SEARCH' button. The main content area displays a table of search results. The table has columns for 'Name', 'Age', 'Email', 'Phone', 'Date Reg', 'Vol Hrs', 'Pro Hrs', 'Criminal Ch...', and 'Access'. A single row is shown for 'Abdul Sherman', who is 35 years old, has an email of 'demo@teamkinetic.co.uk', and a phone number of '7428744378'. The 'Date Reg' is '23/09/2020', 'Vol Hrs' is '7.5', 'Pro Hrs' is '6', and 'Criminal Ch...' has a red 'X' icon. The 'Access' column has a green checkmark icon. Below the table, there is a preview of a volunteer's profile picture and a video player with controls for play, pause, and volume. At the bottom of the page, there are buttons for 'Email', 'Change Status', 'Change Group' (which is highlighted with a red oval), and 'Unlink'.

Name	Age	Email	Phone	Date Reg	Vol Hrs	Pro Hrs	Criminal Ch...	Access
Abdul Sherman	35	demo@teamkinetic.co.uk	7428744378	23/09/2020	7.5	6	X	✓

When you create a group, a unique web address (URL) will be created. Anyone who registers via that URL will then be automatically put in the group. (see image above)

To search for volunteers in a specific group go to **manage volunteers - search volunteer** and add the filter **group member** and choose the group you are looking for.

## 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](#). ( if link doesn't work copy and paste this URL into your browser

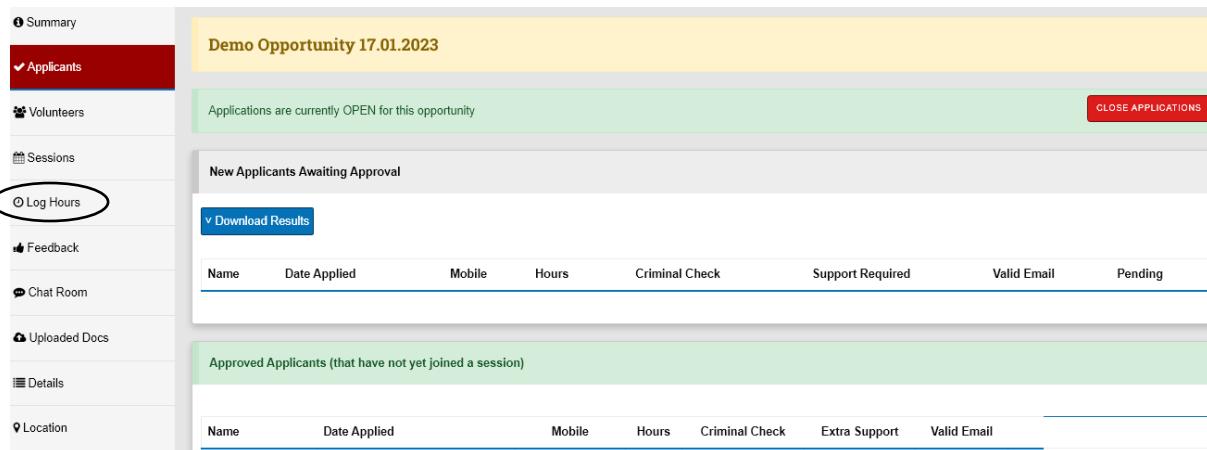
<https://teamkinetic.co.uk/blog/2021/07/19/how-to-get-your-volunteers-to-log-hours/>)

### 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

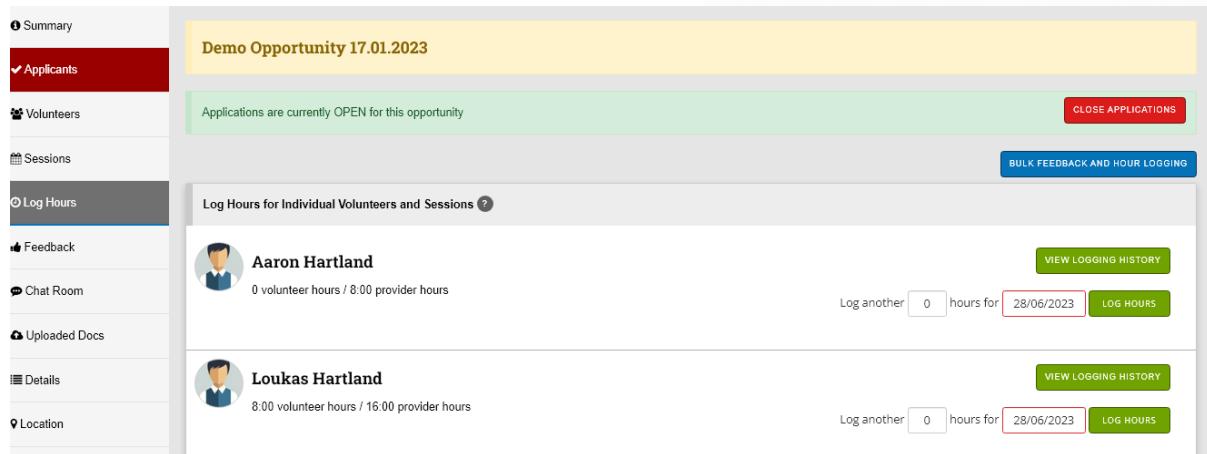
**Step 2** – Go to log hours



The screenshot shows a web-based application interface for managing volunteer opportunities. On the left, a vertical sidebar lists navigation options: Summary, Applicants (highlighted in red), Volunteers, Sessions, Log Hours (circled in red), Feedback, Chat Room, Uploaded Docs, Details, and Location. The main content area has a yellow header bar with the text 'Demo Opportunity 17.01.2023'. Below this, a green bar states 'Applications are currently OPEN for this opportunity' with a 'CLOSE APPLICATIONS' button. The main content area is divided into sections: 'New Applicants Awaiting Approval' (with a 'Download Results' button) and 'Approved Applicants (that have not yet joined a session)' (with a table showing columns: Name, Date Applied, Mobile, Hours, Criminal Check, Support Required, Valid Email, and Pending). The 'Log Hours' section is located on the sidebar.

**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.

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The screenshot shows the 'Log Hours' section for a demo opportunity on 17.01.2023. The sidebar on the left includes links for Summary, Applicants (selected), Volunteers, Sessions, Log Hours (selected), Feedback, Chat Room, Uploaded Docs, Details, and Location. The main content area displays two volunteers: Aaron Hartland (0 volunteer hours / 8.00 provider hours) and Loukas Hartland (8.00 volunteer hours / 16.00 provider hours). Each volunteer entry includes a 'VIEW LOGGING HISTORY' button and a 'LOG HOURS' button. A 'CLOSE APPLICATIONS' button is also visible.

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

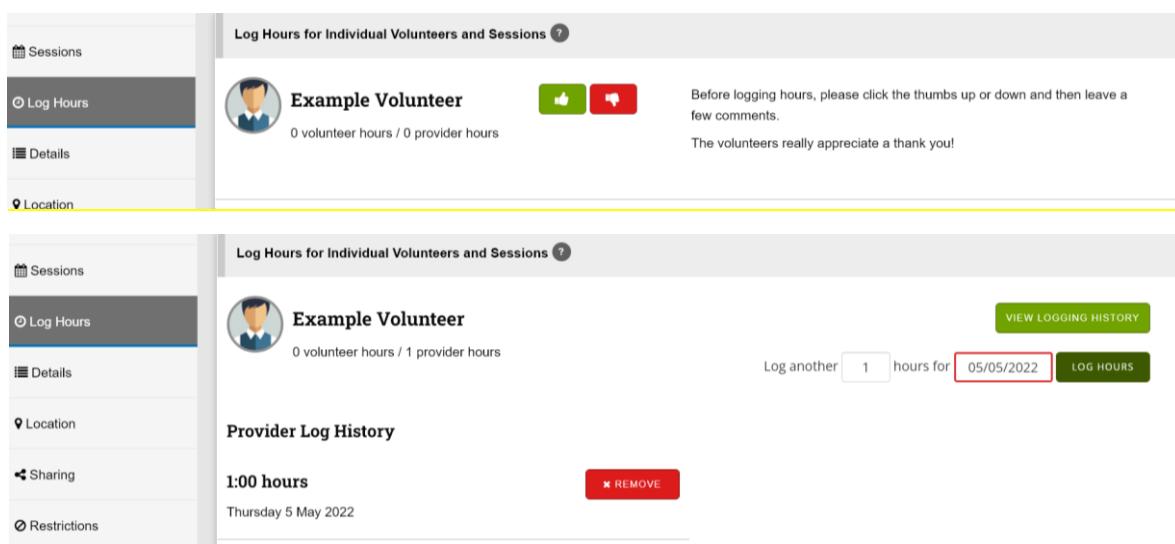
You can also view logging history. This will show you the hours you have logged as a provider and any hours your volunteer has logged.

### 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.

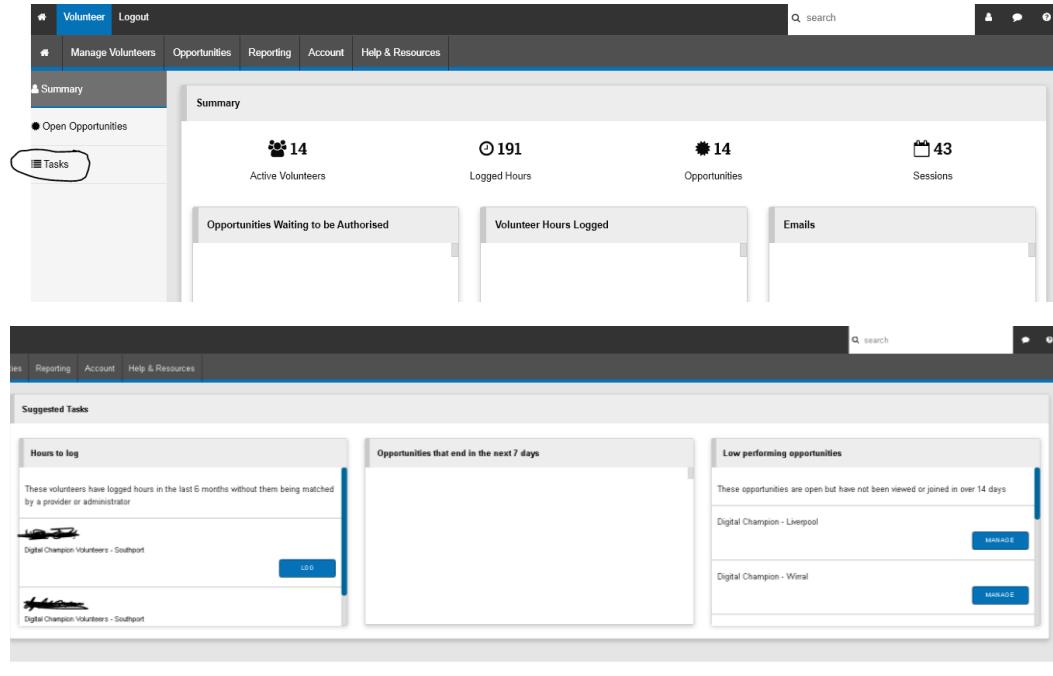
**Step 2** - Before you can log hours, you will need to leave feedback (e.g. say thank you for their time) for the volunteer. You can then record the number of hours a volunteer has done on a particular date.



The top screenshot shows the 'Log Hours' page for an example volunteer. The sidebar includes links for Sessions, Log Hours (selected), Details, and Location. The main content area shows the volunteer's profile with 0 volunteer hours / 0 provider hours. It includes 'thumbs up' and 'thumbs down' buttons and a message: 'Before logging hours, please click the thumbs up or down and then leave a few comments.' and 'The volunteers really appreciate a thank you!' A 'VIEW LOGGING HISTORY' button is also present. The bottom screenshot shows the 'Provider Log History' page for the same volunteer. The sidebar includes links for Sessions, Log Hours (selected), Details, Location, Sharing, and Restrictions. The main content area shows the volunteer's profile with 0 volunteer hours / 1 provider hours. It displays a log entry: '1:00 hours' on 'Thursday 5 May 2022' with a 'REMOVE' button. A 'LOG HOURS' button is also present.

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.

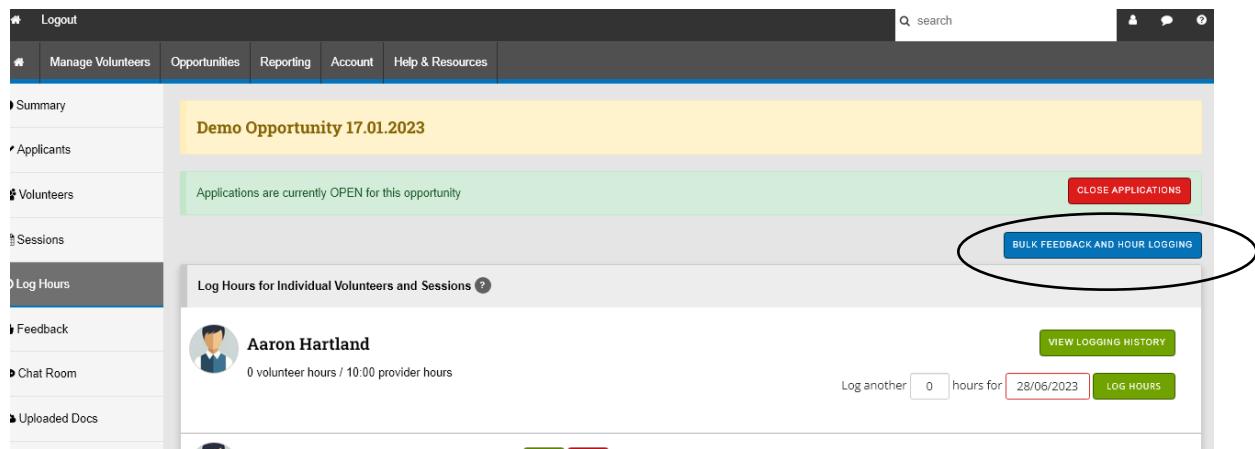


The screenshot shows two main sections of the volunteering hub interface:

- Tasks Section:** This section is circled in the top screenshot. It displays four summary cards:
  - Active Volunteers:** 14
  - Logged Hours:** 191
  - Opportunities:** 14
  - Sessions:** 43
- Suggested Tasks Section:** This section is circled in the bottom screenshot. It displays three categories of tasks:
  - Hours to log:** Shows volunteers who have logged hours in the last 6 months without being matched. It includes a 'LOG' button.
  - Opportunities that end in the next 7 days:** Shows opportunities ending soon. It includes a 'MANAGE' button.
  - Low performing opportunities:** Shows opportunities that have not been viewed or joined in over 14 days. It includes a 'MANAGE' button.

## 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.



The screenshot shows the 'Log Hours' section for a specific opportunity:

- Opportunity Details:** 'Demo Opportunity 17.01.2023' is highlighted in yellow.
- Feedback Section:** Shows 'Aaron Hartland' with '0 volunteer hours / 10:00 provider hours'.
- Logging Section:** Shows a button labeled 'BULK FEEDBACK AND HOUR LOGGING' which is circled in the screenshot.
- Log History:** A 'VIEW LOGGING HISTORY' button is visible.
- Log Buttons:** Buttons for 'Log another' (with a text input for hours and a date input for '28/06/2023') and 'LOG HOURS'.

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

The screenshot shows a navigation bar with 'Manage Volunteers' selected. The main content area is titled 'Digital Champion - Sefton'. On the left, a sidebar lists 'Summary', 'Applicants', 'Volunteers', 'Sessions', 'Log Hours' (selected), 'Feedback', 'Chat Room', 'Uploaded Docs', and 'Details'. The main content area has a yellow header 'Digital Champion - Sefton'. Below it, a box titled 'Bulk Log Hours and Feedback for Flexible Opportunity' contains a text input field with placeholder text '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 of the box are two buttons: 'LOG FEEDBACK AND MATCH LOGGED HOURS' and 'LOG ONLY FEEDBACK'.

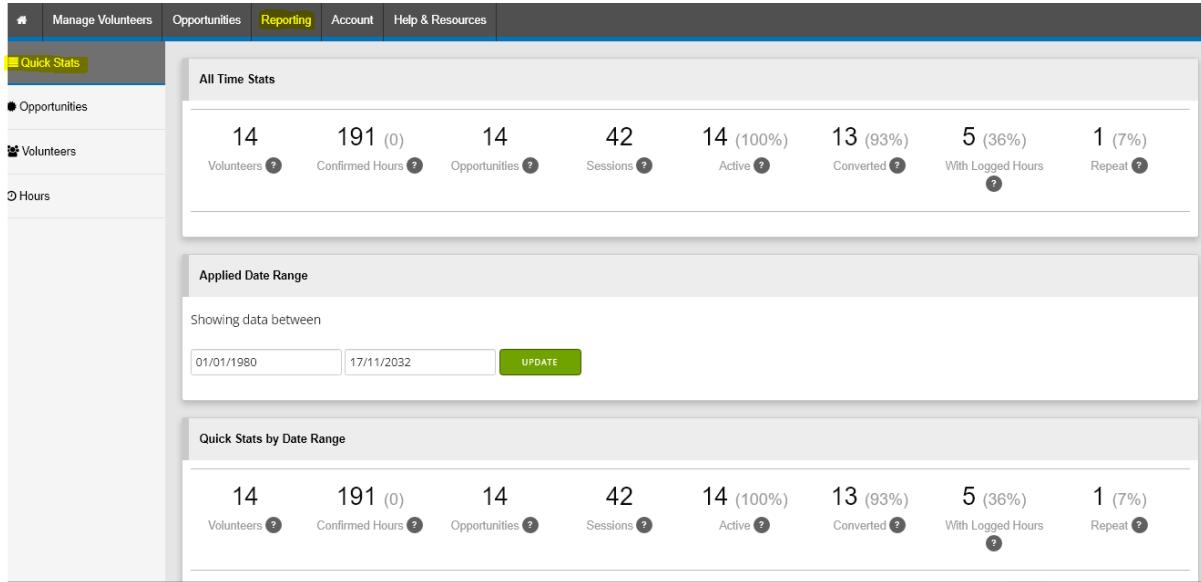
**Step 2-** Write your feedback. Remember this is going to all volunteers who have logged hours on that opportunity. You have the option to log feedback and match logged hours or you can send feedback only.

**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.



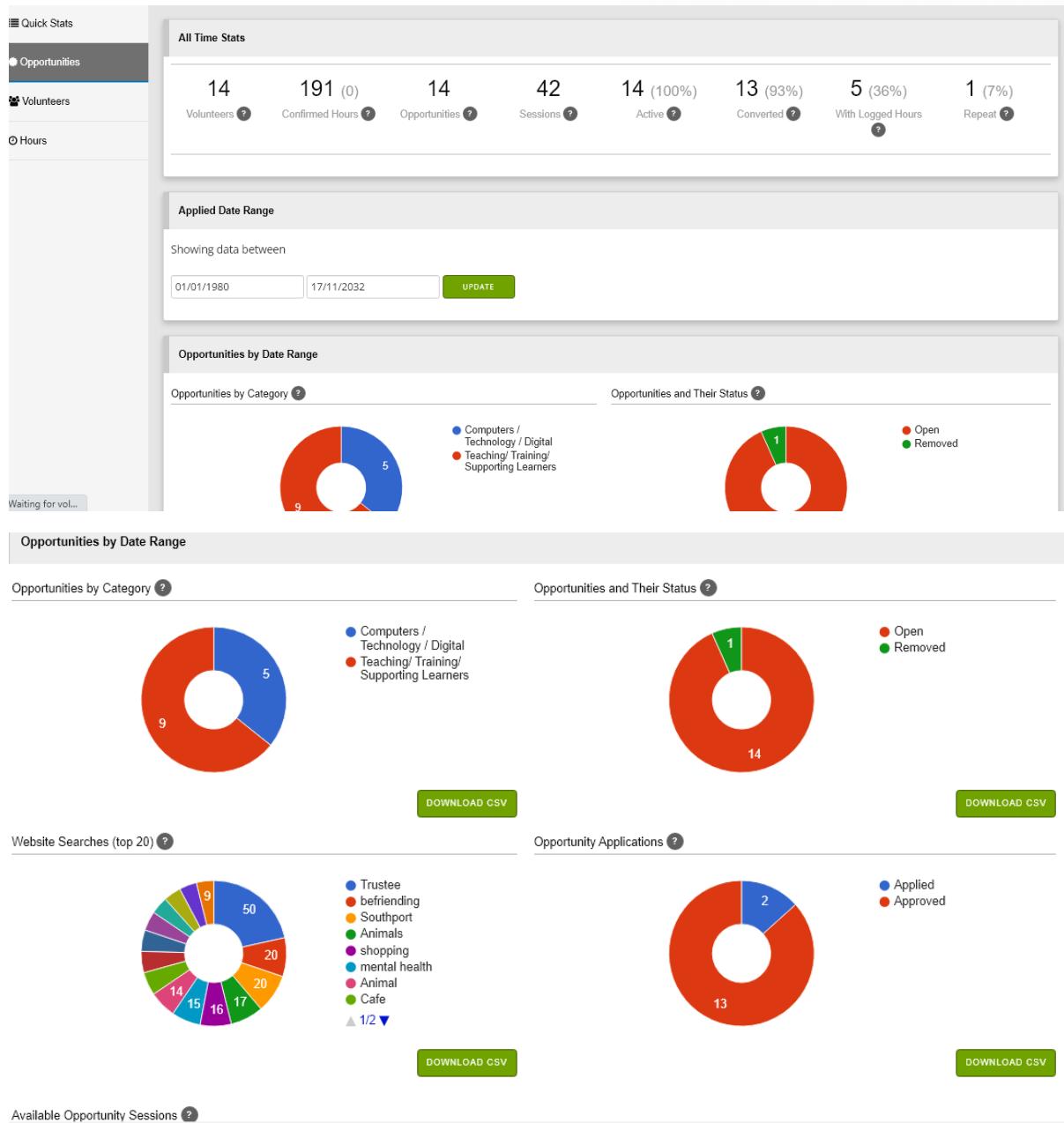
**Step 1** - When you click on **Reporting > Reports & Analysis** you will be brought to the above page. These stats will give you a general overview for your organisation. To find out more about each stat click on the ? symbol.

**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.

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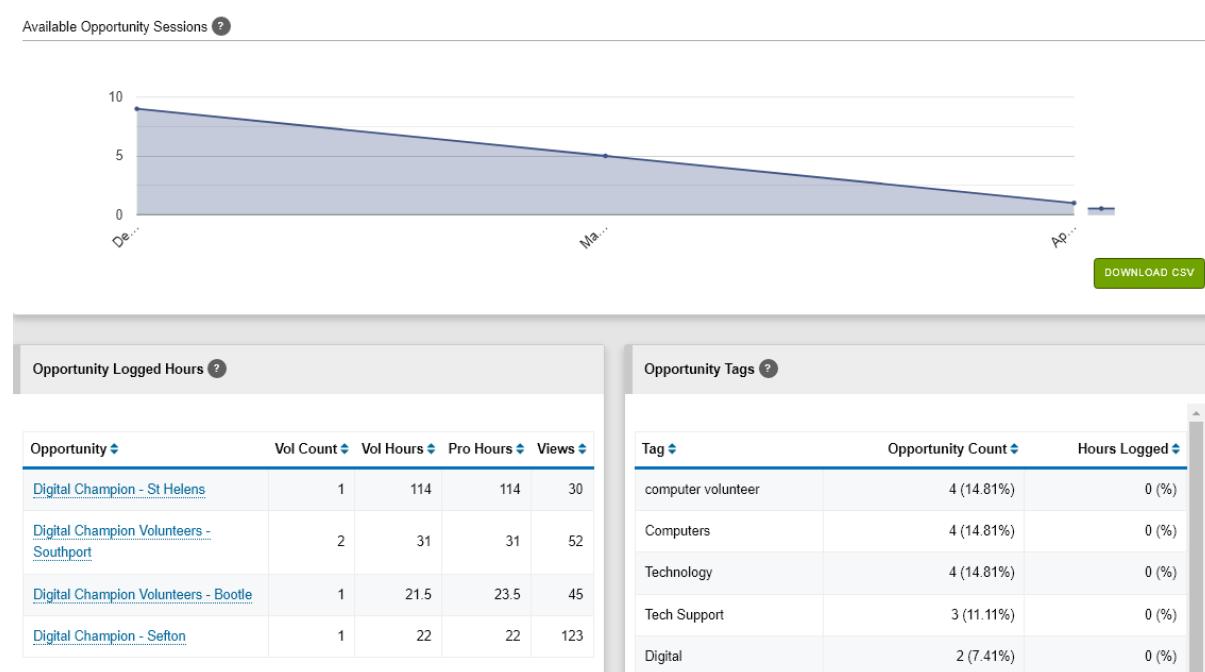
The doughnut charts will show:

- 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



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 Fulfilment**

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

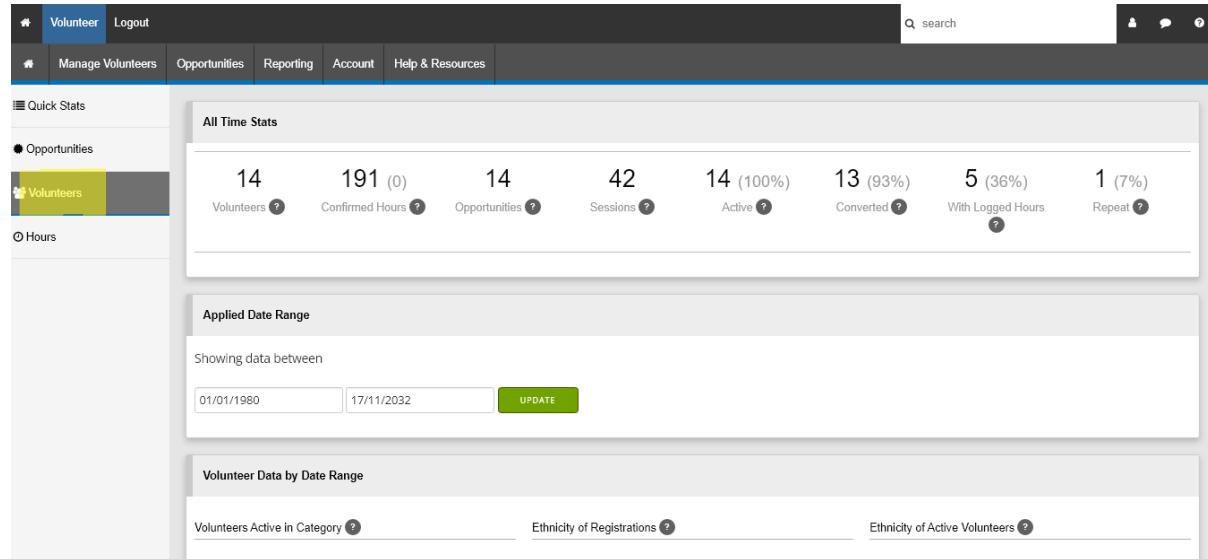
Liverpool City Region  
Volunteering Hub

Make a difference

Make a difference

## 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.



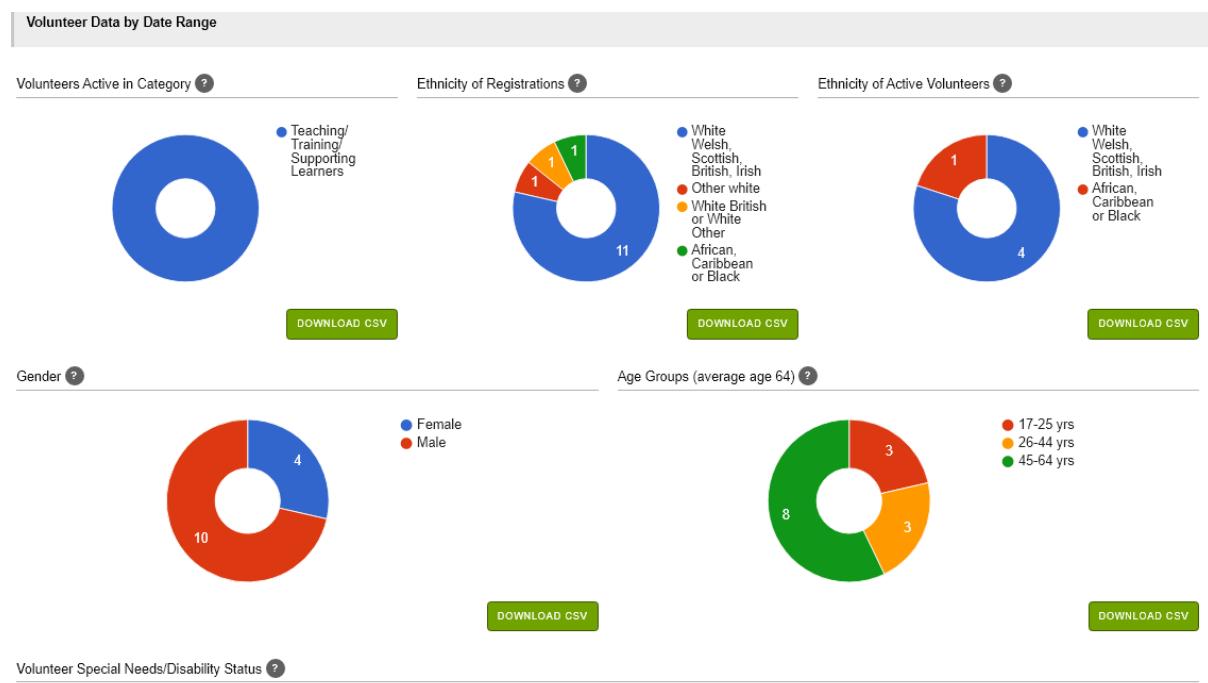
**All Time Stats**

14	191 (0)	14	42	14 (100%)	13 (93%)	5 (36%)	1 (7%)
Volunteers	Confirmed Hours	Opportunities	Sessions	Active	Converted	With Logged Hours	Repeat

**Applied Date Range**

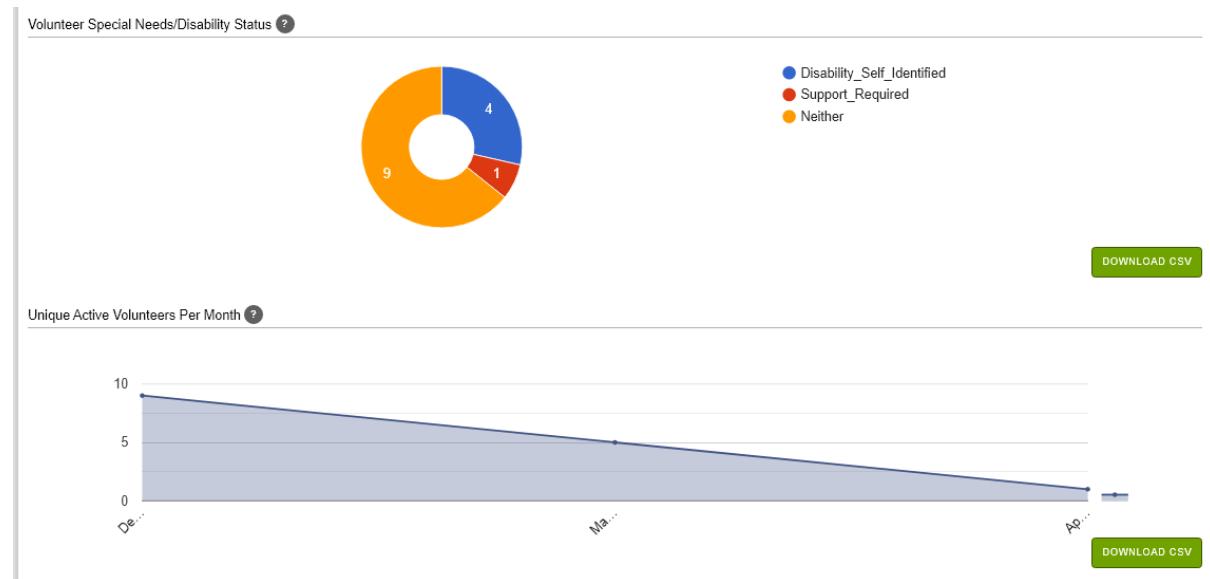
Showing data between 01/01/1980 and 17/11/2032

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.



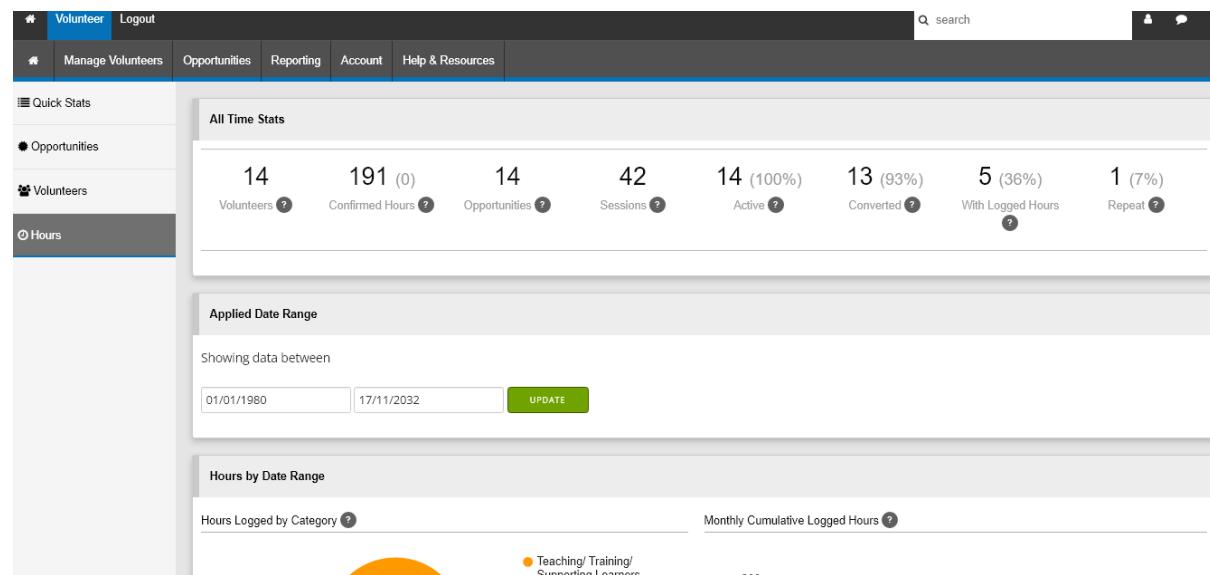
Make a difference

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



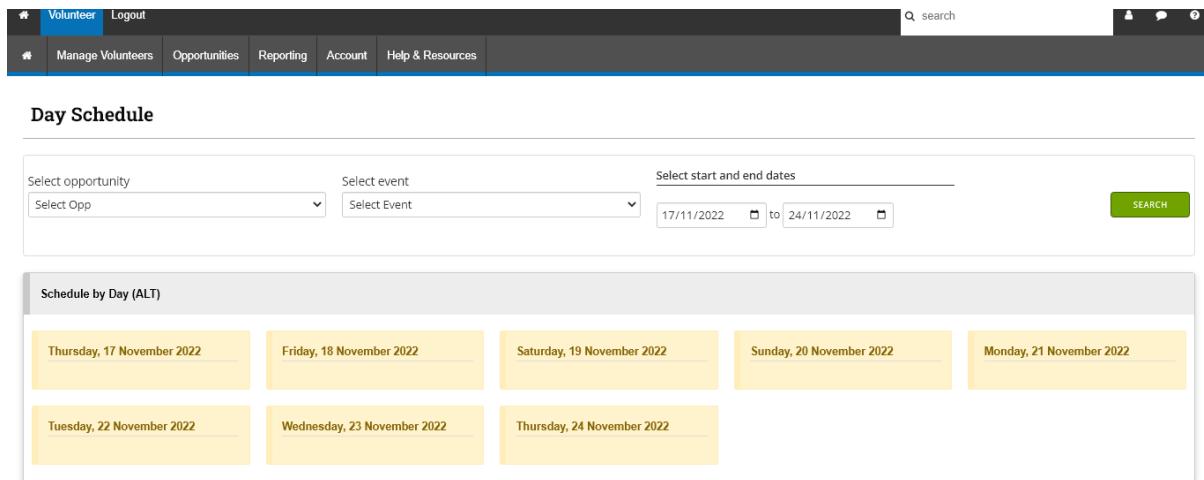
## How do I report volunteer hours?

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

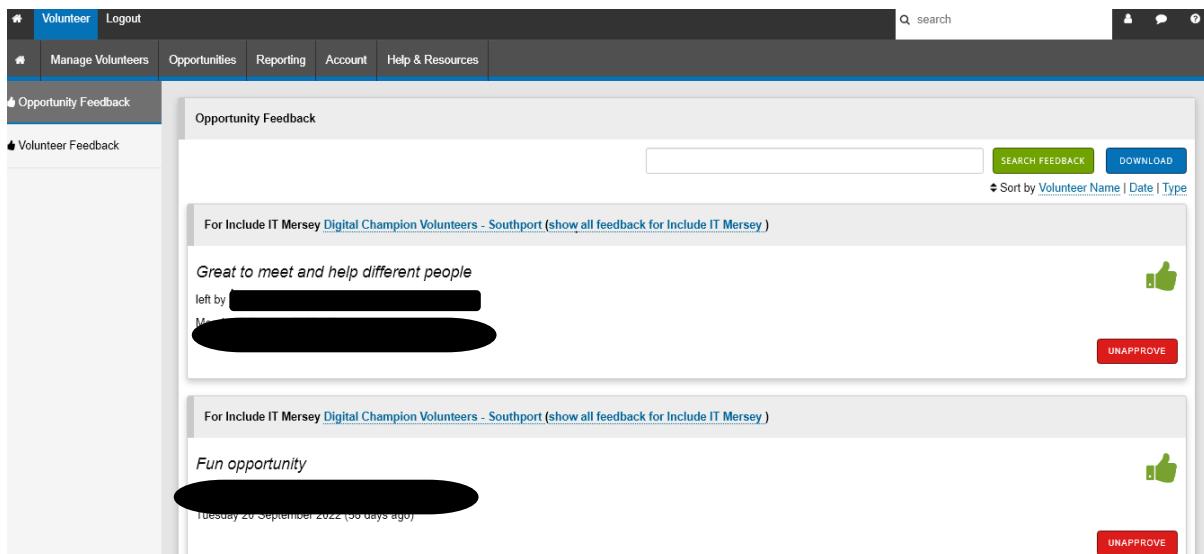
Under the Day schedule tab (Reporting>Day schedule) you will be able to see all the scheduled sessions you have. You can customise this by opportunity, event and date. This page will only be populated if your opportunities were set up under 'Individual sessions'.



The screenshot shows the 'Day Schedule' page. At the top, there are search and filter fields: 'Select opportunity' (dropdown), 'Select event' (dropdown), and 'Select start and end dates' (date range from 17/11/2022 to 24/11/2022). A green 'SEARCH' button is to the right. Below this is a grid titled 'Schedule by Day (ALT)' containing the following dates: Thursday, 17 November 2022; Friday, 18 November 2022; Saturday, 19 November 2022; Sunday, 20 November 2022; Monday, 21 November 2022; Tuesday, 22 November 2022; Wednesday, 23 November 2022; and Thursday, 24 November 2022.

## 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.



The screenshot shows the 'Opportunity Feedback' page. At the top, there are search and download buttons: 'SEARCH FEEDBACK' and 'DOWNLOAD'. Below this, a sorting option 'Sort by Volunteer Name | Date | Type' is shown. The main area displays two feedback entries for 'Include IT Mersey Digital Champion Volunteers - Southport'. The first entry is for 'Great to meet and help different people' and was left by a volunteer whose name is redacted. The second entry is for 'Fun opportunity' and was also left by a redacted volunteer. Both entries have a green thumbs-up icon and a red 'UNAPPROVE' button.

## 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)