



**Support. Service. Success.**

***Volunteer Management:  
How Patron Software Can Help***

# VOLUNTEER MANAGEMENT

## Here's the scenario:

Your organization provides services to the elderly in your community - such as shopping for groceries, picking up medication, meal delivery, yard work and home repairs.

Clients are referred to you through social service programs, local senior centers, churches, family, and friends.

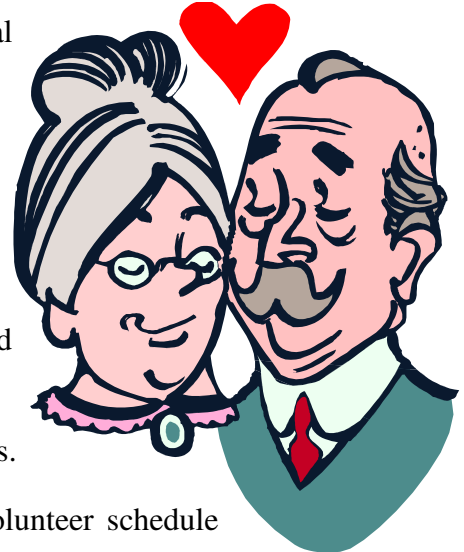
Each client can sign up for as many services, or benefits, as needed.

You've already entered your current client list into your *Patron Software* database (see "*Case Management – How Patron Software Can Help*" for more information on adding, and managing, your clients and program participants).

With so many clients to serve, you depend a lot on your volunteers.

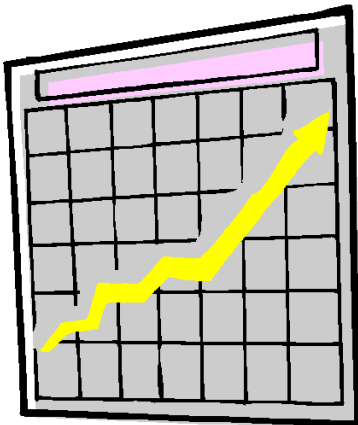
But finding an available volunteer and managing the overall volunteer schedule can be overwhelming and time-consuming.

Because your clients really depend on you, you want to make sure that no one is left out or forgotten.



## Here's the mission:

Grow your volunteer corps and organize it so that everyone who wants to help is matched up with a job that needs to be done.



Maintain a schedule so that your clients' needs are met in a timely manner.

Make sure no one is left out.

# VOLUNTEER MANAGEMENT

To help grow your volunteer corps, you decide to set up a booth in the up-coming Community Day to help raise awareness of your organization and to sign-up new volunteers.

Use *Patron Software's* Event Management function to create a new Event and assign your Volunteer Manager as the event coordinator (see "*Managing a Fundraiser – How Patron Software Can Help*" for more information on setting up events and activities).

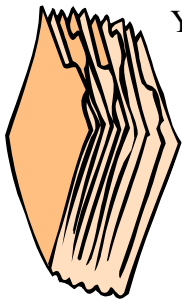


**Congratulations!**

Community Day was a huge success and many people signed up to volunteer.

They are excited about your program and are ready to get started.

Now you need to review and organize all of the volunteer applications so that you can begin the task of assigning jobs to each volunteer.



You can enter each volunteer's information directly into *Patron Software*, or if all you need to enter at this time is the volunteer's name, address and contact information, you can use the Volunteer Import feature.

# VOLUNTEER MANAGEMENT

*Patron Software* makes it easy to enter all of a volunteer's information. Open the Add a New Volunteer screen and start entering data. You can even include a photo!

Add a New Volunteer

Title First Name Last Name Suffix  
Name: Mr. William Johnson

Status: Applicant Start Date: 6/12/2009

Referred By: Member

Demographics | Employer / School | Availability | Emergency Contacts | Medical Info | Notes / Keywords

Social Security #: 555-92-4578 Birthdate: 4/17/1947

Address: 1501 Oak Ln

City: Anytown State: NC Zip Code: 28511-  
County: Derry

Home Phone: (515) 223-7511 Mobile: (515) 612-8702

Work Phone: (515) 555-5000 Ext.: 1234

Fax: (515) 555-5001

Email: wjohnson@email.net

Drivers License: 589771234 Gender: Male

State: NC Race: Black / African American

Expiration Date: 4/17/2012 Marital Status: Married

Get Photo  
Click on PHOTO to Zoom

Save Volunteer Information

Exit

With *Patron Software*, you can add much more than a name and address. Include information about the volunteer's employer, or school. Also, emergency contact and medical information can be stored.

# VOLUNTEER MANAGEMENT

But, what's really helpful is the screen where you check the days of the week, and times of day, when the volunteer is available. You can also include when then volunteer is NOT available!

Add a New Volunteer

Title First Name Last Name Suffix  
 Name: Mr. William Johnson

Status: Applicant Start Date: 6/12/2009

Referred By: Member

Demographics Employer / School **Availability** Emergency Contacts Medical Info Notes / Keywords

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Day	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Early Morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mid Morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Late Morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Early Afternoon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mid Afternoon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Late Afternoon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Early Evening	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mid Evening	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Late Evening	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preferred Time	After 7:00 PM			After 7:00 PM			After 1:00 PM

Time of Year Available  
 Winter  
 Spring  
 Summer  
 Fall

Times Not Available  
 First week of July.

Save Volunteer Information

Exit

Volunteer Service Area

### Service Area List for Johnson, William

Double-click on a Service Area to ADD it to the Volunteer's List

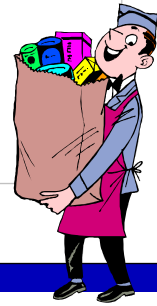
- Data Entry
- Gift Solicitation
- HC - Roofing
- Home Delivery
- Lawn Work
- Logistics
- Medical Transport
- Pack Gift Baskets
- Painting
- Plumbing
- Roofing
- Senior Day Care**
- Service
- Teaching
- Tutor
- Usher

Double-click on a Service Area to REMOVE it from the Volunteer's List

- Chauffeur Service
- Home Delivery
- Lawn Work
- Medical Transport
- Senior Day Care

Add New Service Area Ok

Exit



Include all of the service areas listed by the volunteer.

Knowing when a volunteer is available and what his/her preferred areas of service are, can save your volunteer coordinator many hours.

# VOLUNTEER MANAGEMENT

Now that you have entered information for all your new volunteers, you're ready to start putting them to work.

Your first task is to find someone who is available next Saturday to drive Mrs. Martinez to the grocery store.

Use the Volunteer Lookup feature in *Patron Software* to find which volunteers match your criteria.

The screenshot shows the 'Lookup Volunteer Records' window. It features a search form with the following fields and options:

- Lookup Category:** (Empty)
- Lookup Parameter:**
  - Select Records that Match ALL Parameters
  - Select Records that Match ANY Parameter
  - Display as List
- Is Blank / Is NOT Blank:** (Columns of checkboxes)
- Lookup Options:**
  - Create NEW Lookup
  - ADD TO Current Lookup
  - REMOVE FROM Current Lookup
  - Refresh Lookup Parameters
  - Clear Screen

Search criteria fields include: Last Name, Name, Day Available (Saturday), Street Address, City, State, Zip Code, County, Status, Referred By, Keyword, Has Email, Gender, Race, Marital Status, Birth Month, Employer, Occupation, Service Area (Chauffeur Service), Student, School, and Restrictions. Two red arrows point to the 'Day Available' and 'Service Area' fields.

# VOLUNTEER MANAGEMENT

With just a few clicks of the mouse, you've found 6 volunteers who are available on Saturday and have listed "Chauffeur Service" as an area where they are willing to work.

The screenshot shows a web application window titled "Lookup Volunteers". At the top, a search filter is displayed: "Saturday = Yes AND Service Area = Chauffeur Service". Below this, the profile for a volunteer named Sunny Chen is shown. The profile includes fields for Title, First Name (Sunny), Last Name (Chen), Suffix, Status (Active), Start Date (1/16/2008), and Referred By (Friend). A tabbed interface is visible with "Demographics" selected. The demographic information includes Social Security #, Birthdate (9/12/1951), Address (880 Kirby Drive), City (Carolina Beach), State (NC), Zip Code (28428), County (New Hanover), Home Phone ((910) 788-6588), Mobile, Work Phone, Fax, Email (sunny@email.com), Drivers License (A123456789), State (NC), Expiration Date (9/12/2012), Gender (Female), Race, and Marital Status (Married). A photo of the volunteer is shown with a "Get Photo" button and a "Click on PHOTO to Zoom" instruction. At the bottom of the window, there is an "Update Volunteer Information" button and a navigation bar with "Record 1 of 6" and navigation arrows. A green oval highlights the search filter at the top and the navigation bar at the bottom.

The screenshot shows a dialog box titled "Next Steps...". The search filter "Saturday = Yes AND Service Area = Chauffeur Service" is repeated at the top. Below the title, the question "What do you want to do next?" is displayed. A list of options is provided in a vertical stack of buttons: "Run Reports & Mailing Labels", "Create Mail/Merge Document", "Export to Excel", "Export to .txt File", "Add to a Distribution List", "Send Email", and "Exit".

So, now that you have a list of volunteers that meet your needs, you need to contact each one to see who is available to drive Mrs. Martinez to the grocery store on Saturday.

*Patron Software's* Next Steps gives you several options. You can generate a report that lists each volunteer and his/her contact information, print mailing labels, create a personalized mail/merge document, export information to an Excel spreadsheet, add each volunteer to a distribution list or send each volunteer in the list an email.

# VOLUNTEER MANAGEMENT

If you, or a staff member, is going to call each volunteer then you might decide to print a Name and Address List.

Every report generated in *Patron Software* is presented in Preview Mode. The *Patron Software* Print Toolbar is also displayed.

My Company				
Volunteer Name and Address List				
Saturday = Yes AND Service Area = Chauffeur Service				
<u>Name / Email / Gender</u>	<u>Address</u>	<u>Home / Mobile</u>	<u>Work / Fax</u>	<u>Ext.</u>
Chen, Sunny sunny@email.com Female	880 Kirby Drive Carolina Beach, NC 28428	(910) 788-6588		
Corey, Evelyn evelyn@email.net Female	21 Armand Drive Hampstead, NC 28755	(910) 222-3333 (910) 222-4444	(910) 222-3456 (910) 777-3333	5
Finelli, Nadine nadine@email.net Female	879 St. Vincent Dr. Leland, NC 28375	(910) 323-7864 (910) 323-7890		
Fisher, Addison addisonxyz@email.net Female	1552 Market St. Hampstead, NC 28402	(910) 212-6001 (910) 212-6002	(910) 234-3333 (910) 234-4006	8
Gallagher, Kay karen@email.net Female	1554 Willowood Drive Wilmington, NC 28402	(910) 866-2222 (910) 876-2345	(910) 866-7777 (910) 866-7744	4
Johnson, William bill@email.net Male	140 Joseph Ct. Long Beach, NC 28333	(855) 444-2222 (545) 333-2299	(545) 333-2222 (545) 333-2228	8
Total Volunteers: 6				

## Print Toolbar



Page Setup

Print Report

Email as Attachment

Publish in MS Word

Being able to email any report that is generated in *Patron Software* is very convenient and can be a huge time-saver.

However, sending an email is probably the quickest and most efficient way of reaching each volunteer. Selecting Send Email from *Patron Software* causes your default email browser, such as MS Outlook, to be displayed. Each volunteer's email address is already inserted into the BCC text box. All you have to do is enter your message, click Send, and wait for a reply.



It didn't take long!

One of the new volunteers, William Johnson, replied right away that he is ready, willing and able to drive Mrs. Martinez on Saturday, and to help her with her grocery shopping.

# VOLUNTEER MANAGEMENT

Now that you have a willing volunteer, enter the information into the Volunteer Schedule.

The screenshot shows a web form titled "Schedule Volunteer" for a volunteer named William Johnson. The form includes the following fields and values:

- Date:** 6/27/2009
- Start Time:** 10:00 AM
- End Time:** 11:30 AM
- Event:** (empty dropdown)
- Activity:** (empty dropdown)
- Program:** (empty dropdown)
- Class:** (empty dropdown)
- Service / Benefit:** Chauffeur Service
- Participant:** Martinez, Dawn
- Service Area:** Chauffeur Service
- Location:** Client Home
- Assignment:** Pick up Mrs. Martinez and drive her to the grocery store. Help carry the groceries and put them away.
- Notes:** Mrs. Martinez has arthritis in her hands and cannot carry heavy items.
- Supervisor:** Lisa Carson
- Phone:** (910) 555-6433
- Mobile:** (910) 555-1214
- Email:** lisa@email.net

At the bottom of the form, there is a "Schedule" button and an "Exit" button in the footer.

The volunteer scheduler can be used to schedule volunteers for events, programs, or services.

For example, if your organization's annual fundraiser includes a performance, you may want to schedule volunteers to greet your donors and to help them find their seats.

Or, if your organization offers programs such as after-school mentoring, you can schedule a volunteer for that.

You can also use the volunteer schedule to schedule administrative tasks, such as stuffing envelopes or updating your donor address list.

# VOLUNTEER MANAGEMENT

After completing the volunteer schedule, you can generate a variety of reports which can then be emailed to each volunteer, or to the volunteer coordinator. Select your parameters, then click on Run Report.

Select the Volunteer(s) you want...

- Chen, Sunny
- Corey, Evelyn
- Finelli, Nadine
- Gallagher, Kay
- Hallett, Andrew
- Hinson, Robert
- Johnson, William
- Long, Helen
- O' Malley, Ryan
- Pritchett, Howard

Include ALL Scheduled Entries

Select Event and Program Options

Event:

Activity:

Include ALL Events and Activities

Program:

Class:

Include ALL Programs and Classes

Service / Benefit:

Participant:

Include ALL Services and Participants

Select Option

Show ALL

Show Selected Only

Select Report

Schedule (Short)

Schedule (Complete)

Select Sort Options

by Volunteer

by Date

Select Report Start and End Dates

Today

Tomorrow

Current Week (Sun - Sat)

Next Week (Sun - Sat)

Current Month

Next Month

Select Date Range

Start:

End:

# VOLUNTEER MANAGEMENT

Saturday has come and gone. You've received an email from William Johnson that everything went well with Mrs. Martinez. He arrived at her house on time, took her grocery shopping, helped put the groceries away, and then had a cup of tea and a nice visit with her.

Use *Patron Software's* Apply Volunteer Hours feature to record the date and hours that William spent with Mrs. Martinez.

The screenshot shows a software window titled "Apply Volunteer Hours for Volunteer Johnson, William". At the top, it displays summary statistics: "Total Hours Worked: 2.50", "Current Hours: 2.50", and "Number of Vouchers Received: 0". Below this, there are several input fields and dropdown menus. "Date Worked" is set to "6/27/2009" with a calendar icon. "Number of Hours Worked" is "3.00". "Location" is "Client Home" and "Service Area" is "Chauffeur Service". A central panel contains "Event", "Activity", "Program", and "Class" (all blank), "Service" set to "Chauffer Service", and "Participant" set to "Martinez, Dawn". To the right, there are text boxes for "Accomplishment" (containing "Picked up Mrs. Martinez and took her grocery shopping.") and "Notes" (containing "William took the time to visit with Mrs. Martinez. She really appreciated that."). At the bottom, there is an "Update Volunteer Hours" button and an "Exit" button.

*Patron Software* tracks the total number of hours a volunteer works for your organization.

# VOLUNTEER MANAGEMENT

Many organizations acknowledge each volunteer after he/she has accumulated a certain number of hours worked. For example, your organization may give a volunteer a gift certificate to a local restaurant after he/she has volunteered 20 hours. In *Patron Software*, reward levels are called vouchers. Each week, run a Distribute Vouchers report to see which volunteers have earned an acknowledgement.

My Company Voucher Distribution List 07/12/2009			
<u>Name / Email</u>	<u>Address</u>	<u>Home / Mobile</u>	<u># Vouchers Earned</u>
Ms. Nadine Finelli nadine@emall.net	879 St. Vincent Dr. Leland, NC 28375	(910) 323-7864 (910) 323-7890	1
Mr. Andrew Hallett andy@email.net	1220 Cedar Lane Wilmington, NC 28407	(910) 643-7722 (970) 666-4444	1
Mr. William Johnson bill@email.net	140 Joseph Ct. Long Beach, NC 28333	(855) 444-2222 (545) 333-2299	1
Mr. Howard Pritchett howard@email.net	126 N E St. Mytown, VA 25703	(655) 434-2222 (655) 434-9999	1
# Volunteers Earning Vouchers: 4			Total # Vouchers Distributed: 4



# VOLUNTEER MANAGEMENT

With *Patron Software's* Volunteer Log Report Options screen, you can generate a report to meet your specific needs.

For example, if your organization uses students as volunteers, and you need to report to the school the number of volunteer hours each student has accumulated, click on the Show Students Only option.

Select ONE or MORE VOLUNTEERS...

Name	Street Address	City	State	Student
Chen, Sunny	880 Kirby Drive	Carolina Beach	NC	Yes
Corey, Evelyn	21 Armand Drive	Hampstead	NC	No
Finelli, Nadine	879 St. Vincent Dr.	Leland	NC	Yes
Fisher, Addison	1552 Market St.	Hampstead	NC	Yes
Gallagher, Kay	1554 Wildwood Drive	Wilmington	NC	No
Hallett, Andrew	1220 Cedar Lane	Wilmington	NC	No
Hinson, Robert	330 Belvedere Drive	Concord	NC	No
Johnson, William	140 Joseph Ct.	Long Beach	NC	No
Long, Helen	1008 Rosa Ct.	Carolina Beach	NC	No
O' Malley, Ryan	1420 N. 12th St.	Anytown	NC	Yes
Patel, Neela	15767 S. 23rd St.	Fairway	VA	Yes
Pritchett, Howard	126 N E St.	Mytown	VA	No
Rashad, Hosan	13 Springhill Road, Unit	Leland	NC	No

Include ALL Work Log Entries

Select Event, Program, and Service Options

Event:

Activity:

Include ALL Events and Activities

Program:

Class:

Include ALL Programs and Classes

Service / Benefit:

Participant:

Include ALL Services and Participants

Select Option

Show ALL

Show Students Only

Show Selected Only

Select Report

Complete

Summary

Select Sort Option

by Name

by Date (Ascending)

by Date (Descending)

Select Report Start and End Dates

Year To Date

Last Year

ALL Dates

Select Dates

Start Date:

End Date:

Or, you might offer a program which is sponsored by a funding source that requires annual reports. You can select the program from the list and generate a report of volunteers who have worked for that specific program.

# VOLUNTEER MANAGEMENT

With *Patron Software*, you are able to maintain complete records of all of your volunteers and how they have served within your organization.

*Patron Software* makes it easy to...

- Match the right volunteer with each task
- Schedule a volunteer to help out with general office work, a special event, a program, or as a service to one of your clients
- Track and report on student involvement
- Report back to your funding source
- Reward each volunteer when he/she achieves a service goal
- Know who referred the volunteer to your organization
- Generate dozens of reports
- Find the volunteer you need with just a few clicks of the mouse
  
- And so much more...

With *Patron Software* you spend less time juggling paperwork and more time doing what's important to you – serving your community.



# VOLUNTEER MANAGEMENT

**If you believe that *Patron Software* may be right for you,  
your staff and your organization, please contact us.**

**We will be happy to answer your questions about *Patron  
Software* and your record-keeping needs.**

**(877) 898-3981**

**info@patronsoftware.com**

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Wilmington, NC 28412**

**Thank you!**