

VOLUNTEER MANAGEMENT



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Overview

There are two volunteer experiences the LOC can choose from to manage their volunteers: LOC Control or Volunteer Control. EMS allows each LOC to create figure skating focused volunteer schedule templates, as well as, monitor volunteer compliance.

LOC Control Process

LOC Control is commonly used at U.S. Championships and Skate America. This process is ideal for large competitions that would prefer to maintain control of volunteer management process throughout the competition.

1. Volunteer submits a request
 - a. Contains personal information
 - b. Provides volunteer experience and skill set
2. Admin reviews and approves / declines the request
3. Approved volunteer selects preferred shift(s)
4. Admin approves / declines the shift selection

Volunteer Control Process

Volunteer Control is commonly used at local competitions. Volunteers can sign up and assign themselves to available shifts for your competition. Volunteers and selected shifts are automatically approved, giving volunteers full control of their schedules.

1. Volunteer submits a request
 - a. Contains personal information
 - b. Provides volunteer experience and skill set
2. Volunteer selects a preferred shift based on a first-come first-served basis

Volunteer Management Process

Configuration

- Terms & Conditions
- Shift Selection Period
- Add Shifts
- Add Positions

Shift Setup & Selection

- Templates
- Shifts

Manage Volunteers – LOC Control

- Add New Volunteer
- Export

Volunteer Positions – LOC Control

- Add New Position
- Export
- Unassigned Volunteers

Reports – LOC Control

- All volunteer reports
- Filtered Reports
- Export


Key Terms

Terms	Definitions
LOC Control	A two-step approval process. Approval is granted by the LOC during the Volunteer Signup Open/Close dates. After shifts are built, the LOC approves shift selection requests from approved volunteers.
Volunteer Control	A no approval process by the LOC. Volunteers are in full control of their schedule.
Shifts	The date and block of time volunteer positions are needed and assigned to.
Position	<p>The volunteer’s role during an event. The volunteer may be assigned to more than one role.</p> <p><i>Example:</i> ice monitor, announcer, etc. Positions can be added to each shift dependent upon your needs.</p>
Position Templates	<p>A customizable tool to create a group of pre-set positions that the LOC utilizes more than once. A template can be added and modified to or within a created shift (time).</p> <p><i>Example:</i> A "Field of Play" template is created and will consist of volunteers necessary to run practice and/or competition (announcer, music, ice monitor).</p>
Volunteer Sign Up	The act of individuals requesting to attend the event as a volunteer.
Shift Selection	The positions that approved volunteers select from the event schedule.

Configuration

To begin the Volunteer Management Process, you will:

- Select the volunteer pathway for your event, LOC Control or Volunteer Control.
- Establishing volunteer sign-up open and close dates will provide potential volunteers the ability to request participation at the event.
- To communicate prior to and during the event, establish a “Reply To” email address to receive responses to automated emails.
- Take note of the volunteer link provided for volunteers to directly sign up for your competition.
- Review and attest to the Terms and Conditions provided for compliance and the safety of all participants.

Step	Actions
1	<p>From the <i>Main</i> competition page, click Volunteer Management.</p> <div data-bbox="609 735 1193 829" style="text-align: center;">  </div>
2	<p>Click one of the following management options:</p> <ul style="list-style-type: none"> • LOC Control – Requires LOC review and approval • Volunteer Control – Does not require LOC approval. Volunteers are empowered to select position(s). <div data-bbox="381 1081 1421 1774" style="border: 1px solid #ccc; padding: 10px;"> <p>Set-up Progress 100% Complete</p> <p style="text-align: center;">Configuration Terms & Conditions Shift Selection Period Add Shifts Add Positions</p> <hr/> <p>Event Management ←</p> <p>Configuration →</p> <p>Shift Setup</p> <p>Manage Volunteers</p> <p>Volunteer Positions</p> <p>Reports</p> <hr/> <h3>Configuration</h3> <p>Management Style</p> <p><input checked="" type="radio"/> LOC Control</p> <p>Process Flow:</p> <ol style="list-style-type: none"> 1. Volunteer submits request, including their personal info. 2. Admin reviews, approve/decline request. 3. Approved volunteer selects preference of shifts. 4. Admin approves/declines shifts. <p>Used commonly at U.S. Championships and Skate America. Ideal for large competitions that want to control the process.</p> <p><input type="radio"/> Volunteer Control</p> <p>Process Flow:</p> <ol style="list-style-type: none"> 1. Volunteer completes request, including their personal info. 2. Volunteer chooses the shift they want to work (first-come, first-served basis). <p>Used commonly at local competitions where the LOC prefers the process to be driven by the volunteer.</p> <p>Competition Start: 3/8/2019 Competition End: 3/10/2019</p> <p>Volunteer Signup Open: 12/15/2018 Volunteer Signup Close: 2/15/2019</p> <p>Reply-To Email: <input type="text" value="x.x@simba.usfs"/></p> <p>Volunteer Link: <input type="text" value="https://www.usfsaonline.org/VolunteerManagement/GeneralInformation?compId="/></p> <p><input type="button" value="Save"/></p> <hr/> <p>Terms & Conditions and Background Authorization</p> <p><input checked="" type="checkbox"/> By checking this box, I understand that the two waivers below will be presented to all volunteers requesting to volunteer at my competition. The Background Authorization does not state that the club or competition must complete a background authorization on volunteers. However, with the volunteer's agreement to this authorization, it gives clubs and competitions the ability to complete a background check if they wish.</p> <ul style="list-style-type: none"> • Terms & Conditions • Background Authorization </div>

3	<p>According to the selected management type, schedule the "Volunteer Signup Open:" and "Volunteer Signup Close:" dates by selecting from the calendar tool.</p> <table border="1" data-bbox="435 222 1490 562"> <thead> <tr> <th data-bbox="451 233 686 321">Management Type</th> <th data-bbox="686 233 1482 321">Sign-Up Result</th> </tr> </thead> <tbody> <tr> <td data-bbox="451 321 686 457">LOC Control</td> <td data-bbox="686 321 1482 457">In order to participate in the Shift Request period, the volunteer requests remains in a "Pending" status until the LOC reviews, approves, or denies the request.</td> </tr> <tr> <td data-bbox="451 457 686 552">Volunteer Control</td> <td data-bbox="686 457 1482 552">The volunteer signs up for the competition and automatically moves into Shift Selection.</td> </tr> </tbody> </table>	Management Type	Sign-Up Result	LOC Control	In order to participate in the Shift Request period, the volunteer requests remains in a "Pending" status until the LOC reviews, approves, or denies the request.	Volunteer Control	The volunteer signs up for the competition and automatically moves into Shift Selection.
Management Type	Sign-Up Result						
LOC Control	In order to participate in the Shift Request period, the volunteer requests remains in a "Pending" status until the LOC reviews, approves, or denies the request.						
Volunteer Control	The volunteer signs up for the competition and automatically moves into Shift Selection.						
4	<p>In the "Reply-To Email:" box, provide the Volunteer Chair email address. Responses ("Reply to Email" function) to your established email address are received at this address.</p> <p>Note: Emails sent to your volunteer pool are sent from productsupport@usfigureskating.org.</p>						
5	<p>Click Save.</p> <p>Note: The Shift Set-up button populates.</p>						
6	<p>Review both the Terms & Conditions and Background Authorization and check the box to agree.</p> <p>See References for examples.</p>						
7	<p>Go to Shift Setup.</p>						

Shift Setup


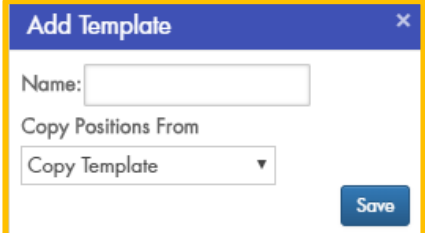
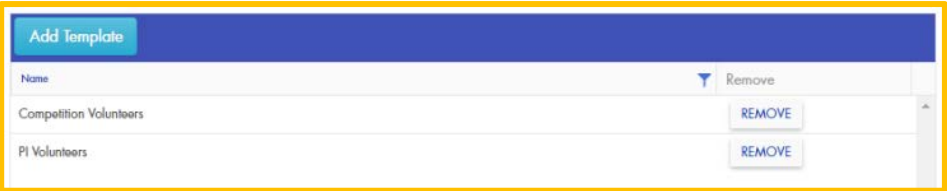
During the Shift Setup, the shift selection periods are established for potential volunteers to request participation at the event.

- LOC Control: You will set the “Shift Selection” window and set the “Volunteer Signup window”.
- Volunteer Control: Volunteers set the “Shift Selection” window.

Consider if you will create position templates or if you will add positions individually.

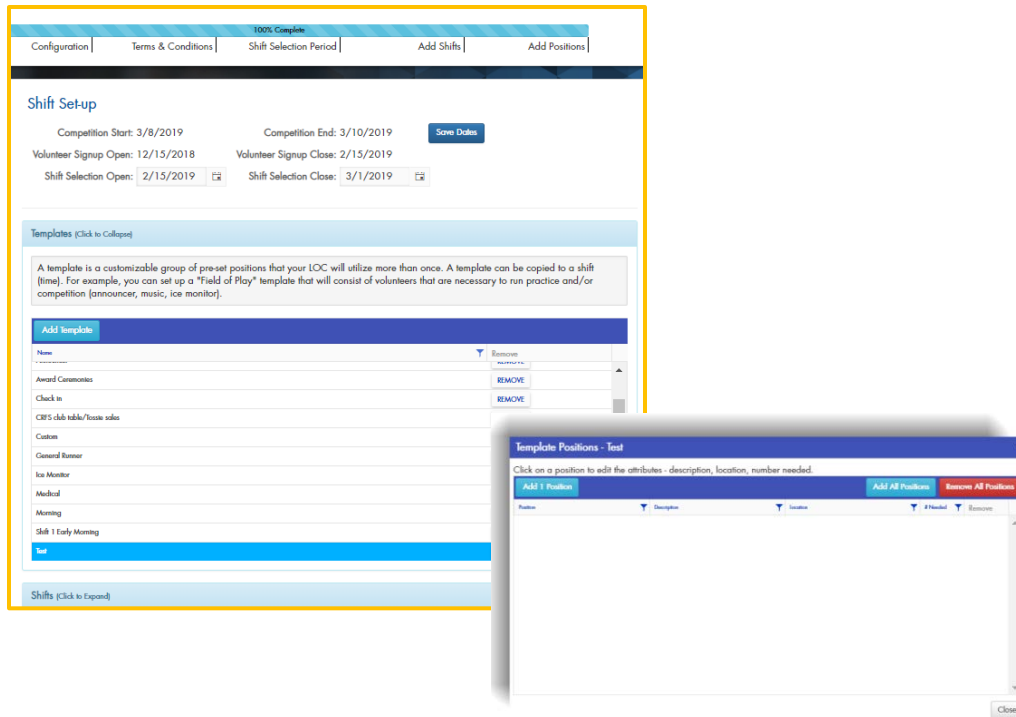
Shifts are the date and block of time volunteer positions are needed and assigned to. Positions are added to each shift dependent upon your needs. The volunteer may be assigned to more than one role. Templates are a group of positions that can be copied to shifts. *Review the [Key Terms](#) for more details.*

Creating Position Templates

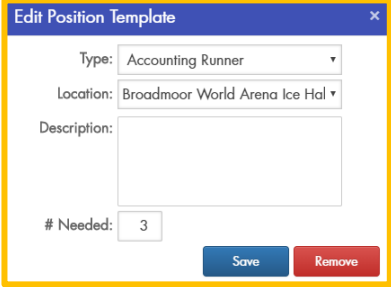
Step	Actions
1	<p>Click Shift Set-up.</p> 
2	<p>Click Templates >Add Templates.</p> 
3	<p>Provide a "Name" for your template and click Save. The template name can reflect a group of positions in a specific location, time of day, or role. The template is now available on the “Templates” grid for you to add positions.</p> <p><i>Example:</i> Competition Volunteers, Practice Ice Volunteers, Lobby (positions: Registration, PI Sales, Ticket Desk), Morning Shift (positions: PI Music/Announce, PI Monitors, Locker Room Monitors, etc.)</p>
4	<p>From the grid, click the name of the template you would like to add positions to.</p> 

5 Determine if adding positions individually or all positions at once.

Note: It is highly recommended for templates that will contain a large number of positions, to add all positions and remove the few that are not necessary for the competition. This practice ensures a position is not forgotten. For a position specific to your competition or for one not listed, use the “Custom” position option.



If you are adding positions...	then...
individually	<ol style="list-style-type: none"> 1. Click Add 1 Position. 2. Select the appropriate position from the "Type" drop-down. 3. Assign the location from the "Location" drop-down. 4. Provide brief details of the volunteer duties in the "Description" box. 5. Type or use the increase/decrease arrows to assign the number of volunteers necessary for the position. 6. Click Save. 7. Repeat <u>Steps 1-6</u> for each position you are adding to the template. 8. Go to <u>Step 6</u> of Shift Setup.
all at once	<ol style="list-style-type: none"> 1. Click Add All Positions. 2. Use the "Location:" drop -down to select area to assign the volunteers to. 3. Provide the number of volunteers necessary in "# Needed" field. 4. Click Confirm. 5. Go to <u>Step 6</u> of Shift Setup.

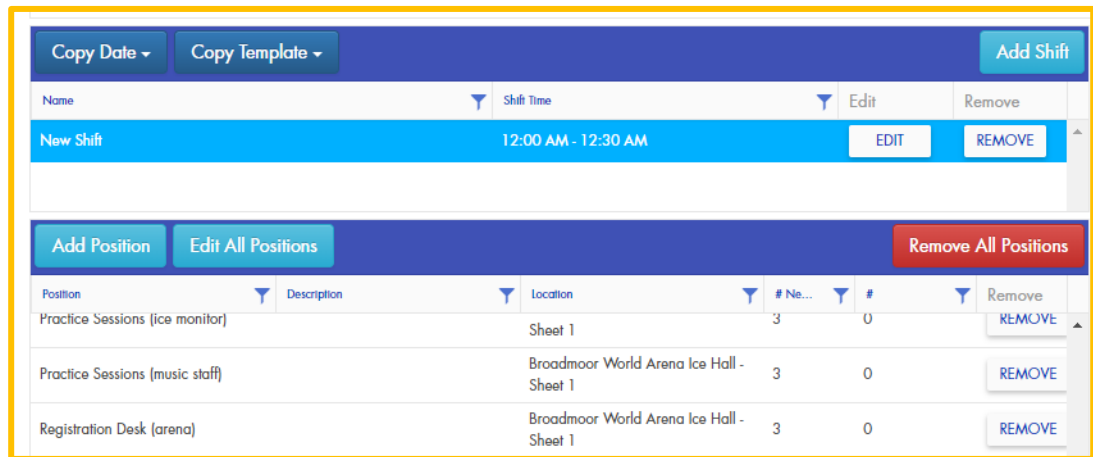
6	To alter a position's "Type", "Location", "Description, or "# Needed" click the position name. Make the necessary changes to the appropriate field.
7	<p>To delete the position from the template, click Remove. You may click Remove All Positions to clear the template.</p> 
8	<p>Click Save for new edits. Repeat Steps 2-7 to add the number of templates necessary for the competition.</p> <p>Note: To remove an entire template, you will click Remove next to the template you are deleting.</p>
9	Click Close when all templates have been added. Go to Adding Shifts .

Adding Shifts

Step	Actions
1	<p>From the Shift Set-up page, click Shifts.</p> 
2	<p>From the calendar, select the date to begin.</p> <p>Note: Shifts must be within the dates of the competition. To add shoulder dates, update the <i>Competition Setup</i> page.</p> 
3	<p>Determine if you are using a template or not using a template to create a shift.</p> 

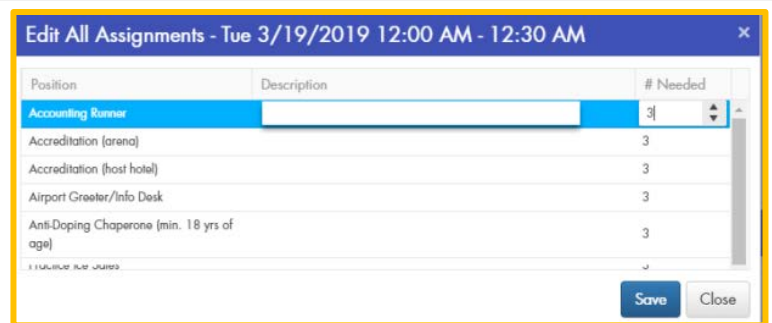
If you are...	then...
using a template	<ol style="list-style-type: none"> 1. Click Copy Template. 2. Select the appropriate template from the dropdown. 3. Click Add Shift Using Template. 4. Provide the "Name:", "Start:" time, and "End:" time. Note: The "Name" is what displays when the volunteer chooses a shift. 5. Click Save. The shift has been added to the schedule. 6. Go to <u>Step 4</u> of Adding Shifts.
not using a template	<ol style="list-style-type: none"> 1. Select the appropriate date to create the shift. 2. Click Add Shift. 3. Provide the "Name:", "Start:" time, and "End:" time. Note: The "Name" is what displays when the volunteer chooses a shift. 4. Click Save. The shift has been added to the schedule. 5. Go to <u>Step 4</u> of Adding Shifts.

4 Click the shift name to review the positions. To make changes to a shift, click **EDIT** from the shift block.



Best Practice: Use **Copy Date** after creating a template to replicate and reuse for a different date. You have the ability to edit time and positions.

5 To modify a position click **Edit All Positions**. Add/edit the "Description" or increase/decrease the number of volunteers.



6 Take note of the following when making changes:

- Editing shifts - The positions from the template will appear in the "Edit All Assignments" grid. **Note:** The changes made to one shift will not change your original template. Changes will only apply to the current shift.
- Editing positions - You can edit 1 or multiple positions of a shift.
 - To modify a single position, select the post
 - To modify multiple positions, click **Edit All Positions**
- You can add a position
- Removing a position - Remove 1 or remove all
Note: To remove a shift you must first remove ALL positions.

7 Click **Save**.

8 For Volunteer Controlled competitions, no further action is taken. LOC Controlled competitions will proceed and complete the **Manage Volunteer** section.

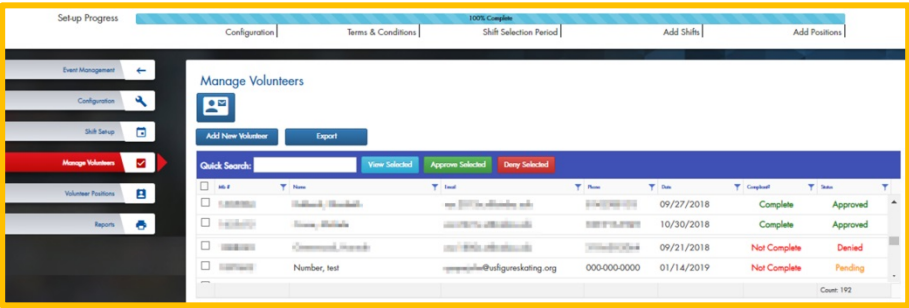
Manage Volunteers

The *Manage Volunteers* page provides:

- A list of people that would like to volunteer at the competition
- Volunteer status
- Profile details
- Compliance information

Through the Manage Volunteers function the LOC has the ability to:

- Approve/Deny volunteers
Note: Through Volunteer Control, volunteers are automatically approved; however, the LOC has the ability to modify the status of volunteers.
- Add volunteers
- Export volunteer information


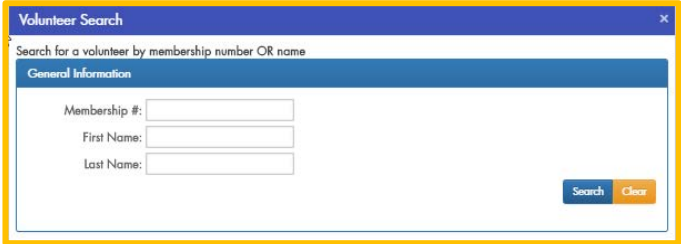
Step	Actions
1	<p>Click Manage Volunteers.</p> <p><i>Note:</i> When the page is accessed for the first time, a volunteer’s status will appear as:</p> <ul style="list-style-type: none"> • “Approved” if using volunteer control • “Pending” if using LOC Control 

<p>2</p>	<p>Use the funnel icon to filter or the quick search function to customize your list and avoid duplicate entries. Refer to Non-Member Account Creation to establish a new profile for non-members.</p> <p>Best Practice: It is highly encouraged for an individual without an U.S. Figure Skating membership to create an account.</p> <p>Note: On screen filters will not carry over to the spreadsheet export. You must use spreadsheet filters after downloading.</p> <p>Review the following:</p> <ul style="list-style-type: none"> • Member # • Name • Email • Phone • Date of Sign Up • Compliance Overview • Status <p>Note: Refer to the Communication quick reference for instructions.</p> <p>Note: Compliance reports as “Complete” when a volunteer has completed both the background check and SafeSport training. Refer to the SafeSport Handbook for more information.</p>
<p>3</p>	<p>Click Export to obtain the list of volunteers.</p>
<p>4</p>	<p>From the on-screen list, you may email one or all volunteers by checking the name(s) to select. Click the email icon and compose the message and send.</p> <p>Note: Emails are sent from Product Support. Replies to your email are received at the address established during configuration.</p>
<p>5</p>	<p>Check the box for a volunteer and click View Selected to review the following:</p> <ul style="list-style-type: none"> • Personal Information • Contact Information • Emergency Information • Experience
<p>6</p>	<p>Add notes to the individual’s profile by typing in the “Notes” field.</p>
<p>7</p>	<p>To modify a person’s volunteer status, check the box and click Approve or Deny Selected.</p>

Volunteer Positions

The Volunteer Positions function is an EMS feature that allows you to complete the following for approved volunteers:

- Approve/deny shifts - See *Reviewing the Collection of Volunteers* for instructions.
- Add new positions – Volunteers may be recruited offline or request additional shifts after the volunteer windows have closed.
- View unassigned volunteer report
Note: When using LOC Control, this is a list of volunteers without shifts or those that have not requested shifts.
- Export the Report of Positions

Step	Actions
1	<p>Click Volunteer Positions.</p> <p>To add a position manually, click Add New Position.</p> 
2	<p>Locate the volunteer you are assisting by Membership #, first name, or last name; click Search.</p> <p>Note: You are only able to search for volunteers approved for this competition.</p>  <p>Click Clear to remove information from the boxes.</p>

3 Using the following drop-downs, select to assign:

- Position
- Location
- Date
- Shift

The screenshot shows a form titled "Add Volunteer Position" with a close button (X) in the top right corner. The form contains the following fields:

- Volunteer: A text input field followed by a "Search" button.
- Position: A dropdown menu.
- Location: A dropdown menu.
- Date: A dropdown menu.
- Shift: A dropdown menu.

 An "Add" button is located at the bottom right of the form.

The screenshot shows the same "Add Volunteer Position" form, but with the following fields populated:

- Volunteer: "Volunteer, Simon" (with a dropdown arrow)
- Position: "Accounting Runner" (with a dropdown arrow)
- Location: "Broadmoor World Arena Ice Hall -..." (with a dropdown arrow)
- Date: "3/19/2019" (with a dropdown arrow)
- Shift: "New Shift (12:00 AM - 12:30 AM)" (with a dropdown arrow)

 The "Add" button is still present at the bottom right.

4 Click **Add** to update the Volunteer Position List.

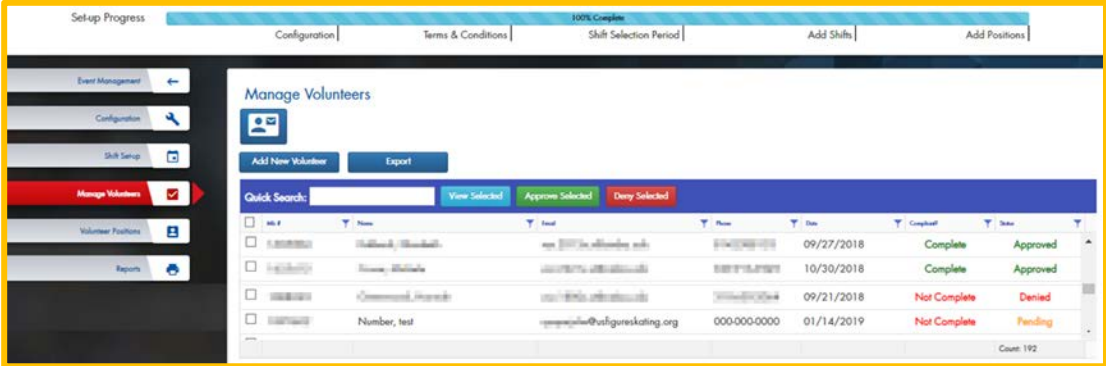
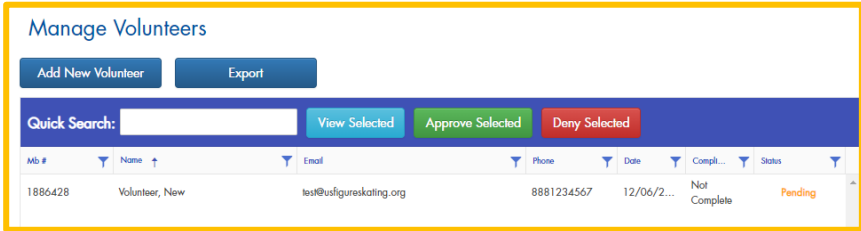
The screenshot shows a "Manage Volunteers" interface. At the top, there are "Add New Volunteer" and "Export" buttons. Below these is a "Quick Search" field and three action buttons: "View Selected" (blue), "Approve Selected" (green), and "Deny Selected" (red). A table below displays the following data:

Mb #	Name	Email	Phone	Date	Compl...	Status
1886428	Volunteer, New	test@usfigureskating.org	8881234567	12/06/2...	Not Complete	Pending

Note: The position assignment is in a "Pending" status until the selected is approved or denied.

5 Go to [Reviewing the Collection of Volunteers](#) for instruction to approve or deny a request.

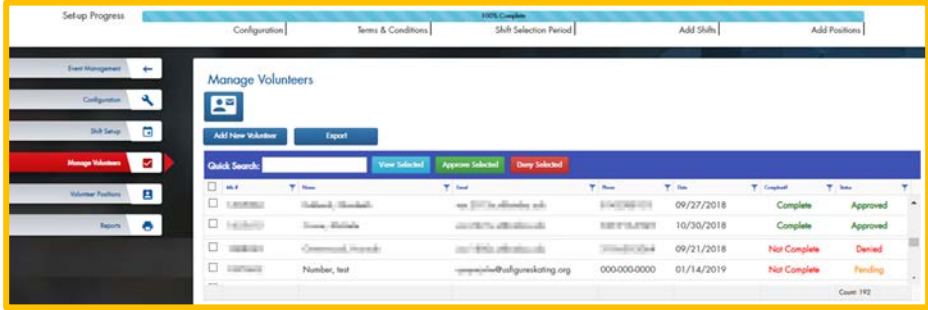
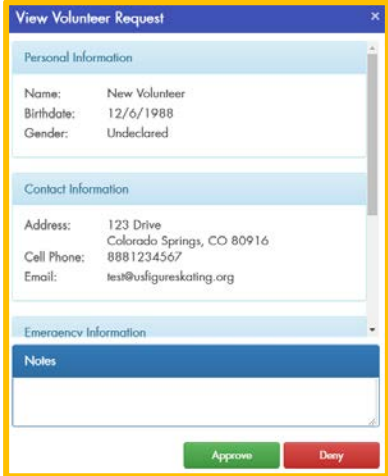
Adding a New Volunteer

Step	Actions
1	<p>Click Manage Volunteers.</p> 
2	<p>Click Add New Volunteer complete the following:</p> <ul style="list-style-type: none"> • Personal Information • Contact Information • Emergency Information • Experience
3	<p>Check the “*Agrees to terms and conditions” and “*Consents to a criminal history check” confirming that the volunteer reviewed and accepted both.</p> <p>Note: When in LOC control, additions to EMS Volunteer Management remain in a “Pending” status until updated to “Approved”. Once approved, access to shift request/selection is available.</p>
4	<p>Click Add Volunteer. The volunteer record has been added to the list and is pending approval.</p> 
5	<p>Click Export. Download and review the Volunteer Request Report for accuracy.</p>

Reviewing the Volunteer Collection

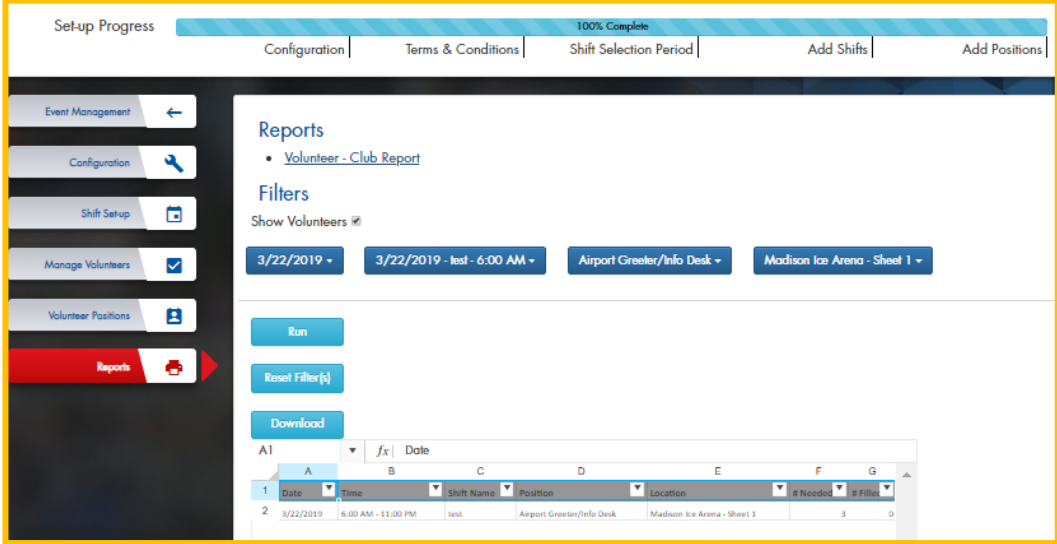
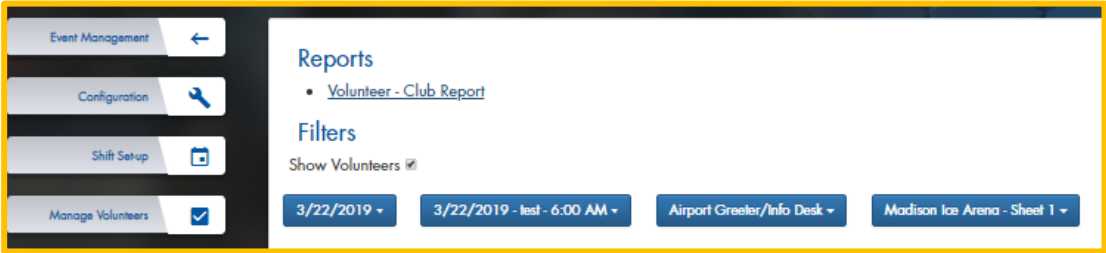
When managing the volunteer process with LOC Control, all volunteer requests require the LOC to review and approve or deny the request. Approved volunteers gain access to shift selection when the selection window opens.

Note: Regardless of control type (LOC Control or Volunteer Control), as the LOC, you can deny a volunteer at any time.

Step	Actions
1	<p>From the <i>Manage Volunteers</i> page, check the box for each volunteer you will review.</p> 
2	<p>Click View Selected and review the "View Volunteer Request" details. The following are now available:</p> <ul style="list-style-type: none"> • Personal Information • Contact Information • Emergency Information • Volunteer Experience • Notes – you may add in the text box 
3	<p>To confirm a request, click Approve. To disapprove the volunteer click Deny.</p>
4	<p>Click Export and download the Volunteer Request Report.</p>

Volunteer Reports

The **Reports** tab allows you to customize and download volunteer reports. The report provides details for shifts, positions, and volunteers. You have the ability to export the spreadsheet.

Step	Actions
1	<p>Click Reports.</p> 
2	Click Run to generate the full report.
3	<p>To customize the report, use the listed dropdown filters appropriately:</p> <ul style="list-style-type: none"> • Select a Date • Select a Shift – Check mark if you would like to review the volunteer’s information. • Select a Position <p>Note: Custom positions created will not generate on the report under the assigned name. It is a general listing in the “Custom” category.</p> • Select a Location <p>Note: During your report selection, click Reset Filter(s) to clear the filter fields.</p>
4	Click Download to retrieve the report.
5	<p>To view volunteer hours by club, click Volunteer – Club Report from the “Reports” section at the top of the page.</p> 

References

Volunteers: Terms & Conditions



TERMS & CONDITIONS

Selection & Discharge of Volunteers: It is possible that we will receive more volunteer applications than positions available. Therefore, submitting a volunteer application does not mean that you will be selected as a volunteer. The selection of volunteers from among the qualified applicants is at the sole discretion of U.S. Figure Skating and is not subject to appeal and dispute. No reason need be given for the refusal of an applicant. Volunteers will not be selected or rejected on the basis of race, color, religion, age, gender, gender identity, national origin, or sexual orientation. Persons with disabilities must be able to perform the essential functions of the volunteer position for which they are selected; however, persons with disabilities can perform the essential functions of most volunteer positions. Acceptance as a volunteer creates no rights to any compensation, benefits, or continued service. A volunteer has no authority, express or implied, to commit or bind U.S. Figure Skating to any obligations of any nature. Volunteers are subject to all applicable policies and rules established by U.S. Figure Skating pertaining to the nature and scope of the activities in which volunteers are engaged. Volunteers serve at the pleasure of U.S. Figure Skating. U.S. Figure Skating reserves the right to terminate the service of any volunteer and to reclaim the volunteer credential issued. Termination is at the sole discretion of U.S. Figure Skating and is not subject to appeal or dispute.

Revised: 5/1/2017

Volunteers: Background Release



BACKGROUND RELEASE

In consideration of being permitted to participate in selected activity, and in voluntary recognition and assumption of any risks and hazards associated with my participation, I, for myself, and heirs, personal representatives, successors and assigns, hereby voluntarily release and hold harmless U.S. Figure Skating, member clubs and each of their officers, directors, committees, employees, agents, participants, and representatives, and all other entities or parties associated with selected activity (collectively, the "Releasees") from any and all claims, losses, damages and liabilities arising from death, injury, illness or damage, whether to person or property, incurred or suffered by me or any other person arising out of, relating to, or resulting from my participation in selected activity and related incidental activities, including pre-event set-up and post-event tear down activities. I approve the use in any medium of my picture, likeness, image, or voice for promotional use, regardless of whether the picture, likeness, image or voice was recorded before, during or after selected activity.

I hereby give my permission to U.S. Figure Skating to obtain information relating to my criminal history record through a reporting agency that regularly performs background checks. I understand that I may be required to provide a set of my fingerprint impressions for the records check to be completed. If I am not required to provide fingerprint impressions, I understand that the records check will be conducted based on my social security number. The criminal history record, as received from the reporting agencies, may include arrest and conviction data as well as plea bargains and deferred adjudications and delinquent conduct committed as a juvenile. I understand that this information will be used, in part, to determine my eligibility for a volunteer position for selected competition. I also understand that the criminal history could contain information presumed to be expunged.

I, the undersigned, do, for myself, my heirs, executors and administrators, hereby release and forever discharge and agree to indemnify, and hold U.S. Figure Skating and the organization performing the background check and each of their respective officers, directors, employees, and agents harmless from and against any and all causes of actions, suits, liabilities, costs, debts, and sums of money, claims and demands whatsoever (including claims for negligence, gross negligence, and/or strict liability of U.S. Figure Skating and the organization performing the background check) and any and all related attorneys' fees, court costs and other expenses resulting from the investigation of my background in connection with my application to become a volunteer for selected competition.

I further authorize U.S. Figure Skating to check my criminal history records with any or all local, county, state, and federal agencies and records departments as part of my association as a volunteer for selected activity.

Revised: 5/1/2017