Managing Volunteer Campaigns in Salesforce

Salesforce Volunteer Campaigns provide an at-a-glance snapshot of your active structure volunteers and are an invaluable tool for managing volunteer training and engagement. There is a Volunteer Campaign for each state, with a naming convention as follows: ACS CAN [state name] Volunteers.

To ensure these Volunteer Campaigns are accurate and that our volunteers are having the best possible experience, GRMs are expected to do four things in Salesforce: 1) use Volunteer Community links to fill open volunteer positions; 2) follow up promptly with volunteer handoffs, using the status drop down menu to reflect the results of that follow-up; 3) monitor volunteer status throughout the year, opting out volunteers no longer serving in their roles; and 4) confirm that your volunteers are accessing trainings in a timely manner.

1. **Use Volunteer Community links to recruit legislative ambassadors, ACT Leads, Vice SLAs, and SLAs** (Salesforce binder 2d). Send link to warm leads, use link as needed to promote role on social media and to online volunteers. All new legislative ambassadors, ACT Leads, Vice SLAs, and SLAs should enter Salesforce via the Volunteer Community, regardless of how they are recruited.

    1. To find the link, go to the VC via the Quick Links on the Society Source home page
    2. Click on Find an Opportunity
    3. Use the ACS Programs and Zip code filters to find the ACT Lead position. Enter any zip code in the state to find the ambassador, SLA, and Vice SLA positions.
    4. Click Update Results.
    5. Click on the position title
    6. Copy the position URL
    7. Send this URL to the prospective volunteer or use it to recruit broadly

    Note that links for the ACT Lead, Vice SLA, and SLA positions must be published on the Volunteer Community as a first step:

    1. In the Related List Quick Links select Volunteer Jobs
    2. Select the Volunteer Job you want to publish on the Volunteer Community
    3. On the bottom right-hand side of the screen Click the Volunteer Shift link
    4. Check the “Display on Website box.” This step publishes the job on the VC

2. **Follow up with volunteer handoffs**. New legislative ambassadors should be contacted within five business days to welcome them and assist them to begin their first activity. After following up with a new volunteer, make a note of this interaction on the volunteer's Volunteer Hours record. If a volunteer is handed off and then does not become an active volunteer, you should update their status to Opt Out.

3. **Ensure all volunteer statuses are accurate in Salesforce.** Mark inactive legislative ambassadors, ACT Leads, Vice SLAs, and SLAs as "Opted Out" (Salesforce binder 2f).

    1. In Related List Quick Links, Select Volunteer Jobs
    2. Click on the link of the correct job
    3. In the bottom right-hand corner Select "View All" under Volunteer Hours
    4. Find the Extended Profile Info Name of the correct volunteer
    5. On the right-hand side of the screen click the dropdown arrow for the volunteer that needs to be updated and select Edit.
    6. Select the appropriate Status: There are several Status options available, but CAN volunteers should only ever be updated to Confirmed (Volunteer has completed onboarding requirements and is currently volunteering or is ready to begin volunteering) or Opt Out (Volunteer is no longer engaged in this position).
    7. Select Save

4. **Ensure that all new ACT Leads and SLAs have access to training and support.** Check to see whether your new volunteers have been assigned a training, and what their completion status is, by navigating to the ***My Training*** field in the *Related List Quick Links* section in the volunteer's contact record.