

**URVC Office Handbook**  
**2019-2020**

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## **Introduction**

The URVC has been in existence since 1987. It was the first of its kind at a high education institution and grew into the active organization that it is today.

The University Retirees Volunteer Center (URVC) facilitates matching approximately 450 volunteers to projects which are enhanced—and often only made possible--by the service of volunteers. The URVC has been connecting volunteers to projects for more than 30 years. Last year our volunteers supported about 80 projects occurring on the University of Minnesota campus and throughout our Twin City metro communities with over 10,000 hours of service.

This handbook is a compilation of contributions by Sally Shackel, Marva Sullivan, Alan Kagan, and Randi Lundell. It is revised annually and available on the URVC Team Drive.

McNamara Center  
URVC Office  
2019

## **Part I: URVC Office Basics**

### **Office Location:**

McNamara Alumni Center 263

Phone: 612-625-8016

E-Mail: [urvc@umn.edu](mailto:urvc@umn.edu)

Web: [www.urvc.umn.edu](http://www.urvc.umn.edu)

### **Office Staff:**

Monday: Sally Schakel

Wednesday: Randi Lundell

Tuesday/Thursday: Jenna Pleshek

Friday: Alan Kagan

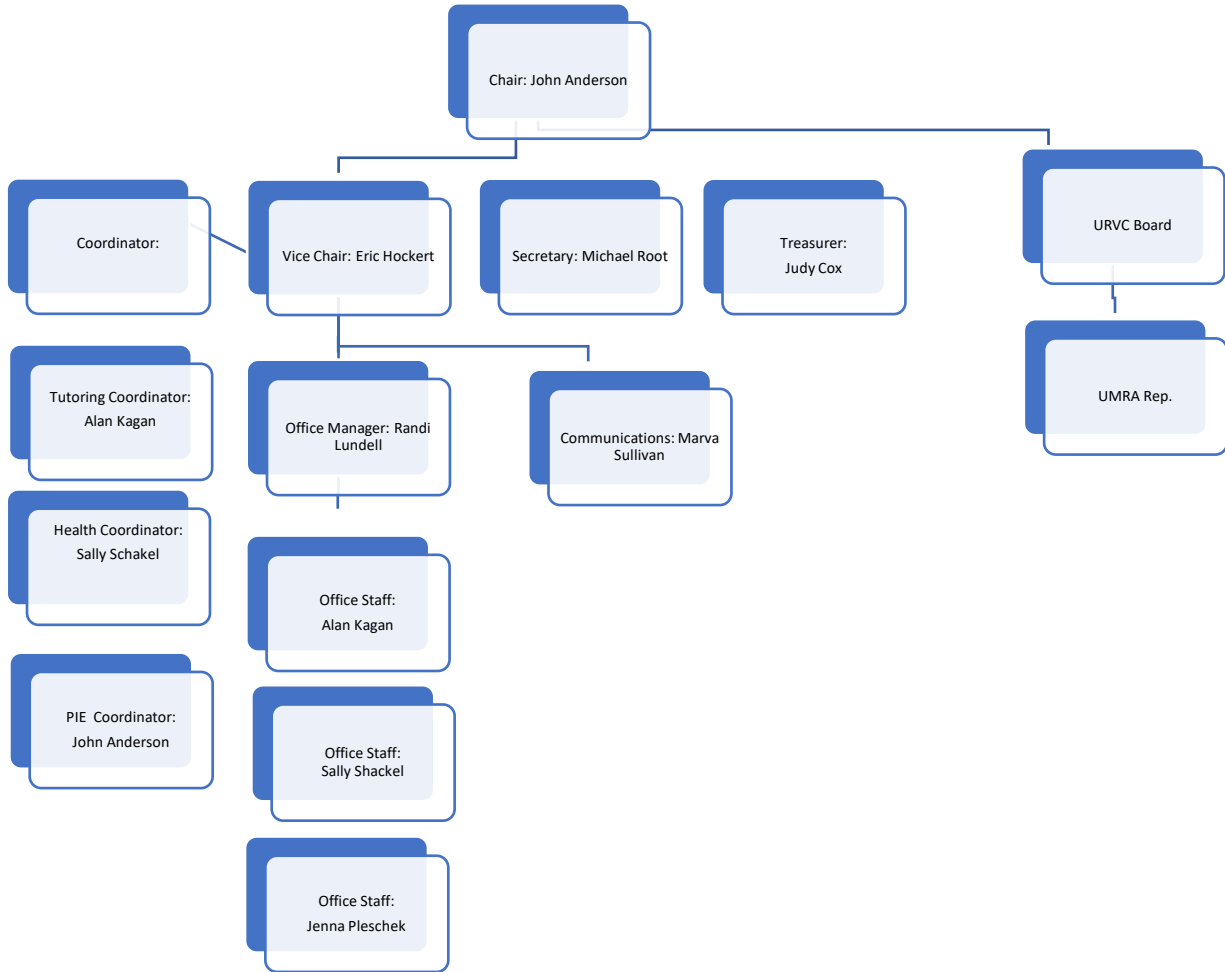
### **Coordinators:**

John Anderson – Acting PIE Group Coordinator

Alan Kagan – Tutoring Coordinator

TBD – Health Consultants Coordinator

# URVC Organizational Chart



URVC Board of Directors

		Term Expires
John S. Anderson	651-489-4330	7/20
Judy Cox	651-338-8484	7/20
Frank Cerra	612-201-1563	7/20
Eric Hockert	651-528-8099	7/20
Alan Kagan	651-457-6586	7/20
Alexander Levitan	651-633-2081	7/20
Lucy Levitan	651-633-2081	7/20
Peg Lonquist	612-625-3964	7/21
Deanne Magnusson	952-465-7381	7/21
Jeanene Noll	612-807-4282	7/21
Michael Root	612-922-6981	7/20

## Office Procedures:

1. Project is selected, announcement written, project entered into Better Impact (BI).

Staff: Eric and Marva

Process: Project entered into Better Impact, but not activated until it is reviewed for content and BI settings (e.g., schedule, visibility etc.). Sally reviews the project announcement and determines the settings to be used for the activity in Better Impact.

Details: The project will be entered into Better Impact, but not activated until it is reviewed for content and BI settings (e.g. schedule, visibility etc.). Marva would like the office staff to review the project announcement and give her feedback *before* its release.

1. Project is selected. (Eric)
2. URVC Projects Criteria List is used to provide detailed information for the project announcement. (Eric)
3. Draft of the announcement is written. (Marva)
4. Draft announcement is sent for review and approval. (Eric, URVC office staff)
5. Better Impact settings for the project are determined. (Sally)
6. Project is entered into Better Impact but is not activated. (Marva)

2. Project sheet and phone list are created and placed in the appropriate office notebook.

Staff: Alan or Sally

Process: Continue to create a project sheet for the office notebooks(s). Print the phone list from Better Impact using the General Interest category (or categories) that best describes the project. Place a printed copy of the project announcement in the notebook. Move a digital copy of the announcement to Team Drive.

Details: Continue to create a project sheet for the office notebook(s). Print the phone list from Better Impact using the General Interest category (or categories) that best describes the project. Place a printed copy of the project announcement in the notebook. Move a digital copy of the announcement to Team Drive.

### Creating a Phone List in Better Impact:

1. Go to: **Communicate>>Create Phone List**.
2. In the Module and Status Filters box, click on **Volunteers** who are applicants, in process, or accepted. You will not want “inactive “volunteers on the phone list.
3. Do not filter any of the email options under **Communication Filters**, unless you want only those without email on the phone call list.
4. Click on the **Add Search Criteria** button. From the dropdown list, select “General Interests.”
5. Check the box next to the General Interest category(s) that fits the type of activity for which you will be phoning. Volunteers who selected this General Interest in their volunteer profile will be on the phone call list.
6. Click the **Add and Go** button.
7. Click the **Search** button. A phone list will be generated based on your search criteria.
8. Download the phone list, open it, and print.
9. To print phone lists for more than one General Interest, repeat the process.

3. Project is announced to volunteers.

Staff: Sally

Process: Activate the project in Better Impact. Send project announcement to volunteers using the Better Impact email system. Select the recipients based on the General Interest category (or categories) that best describes the project.

Details: Project is announced to volunteers via email. (Sally)

1. Activate the project in Better Impact.
2. Select the recipients based on the General Interest category (or categories) that best describes the project.
3. Send the project announcement to selected volunteers using the Better Impact email system. Include Eric, Marva, Alan, and URVC Office on the blind copy list.

4. Project is announced to OLLI and UMRA ListServes.

Staff: Alan and John

Process: This is optional. Alan and John will determine the projects to announce.



5. Interested Volunteers respond to the project announcement.

Staff: Office

Process: Volunteers may sign up through BI or send an email message to [urvc@umn.edu](mailto:urvc@umn.edu) or by calling the office at 612-625-8016.

Details:

Signing up through Better Impact. *A notification of a volunteer’s interest is automatically sent to the URVC office email:*

University Retirees Volunteer Center

A volunteer in your organization has changed their availability.

Volunteer Details:

Name: Prof. John S. Anderson

Email Address: [ander049@umn.edu](mailto:ander049@umn.edu)

Activity Details:

Educator - Tutor International Students - Facilitator for Partners-In-English: Wednesdays afternoon group

Availability Details:

The volunteer is available for these shifts:

Wednesday, March 20, 2019 from 4:00 PM until 6:00 PM

6. Volunteers are assigned to the project in Better Impact (BI).

Staff: Office

Process: Staff sends “Welcome Letter” to prospective volunteer with instructions to sign-up in Better Impact system. Volunteers are automatically assigned (self-scheduling projects in BI) or assigned by office staff (unscheduled).

Details:

**a. Automatically assigned (self-scheduling projects).**

These are activities, such as ushering for the Rarig Theater, where volunteers are automatically assigned to the schedule when they select the date/shift from MyVolunteerPage. When the shift is filled (e.g. 2 volunteers have signed-up for a Rarig date) it no longer appears as an option to volunteers.

To verify that a volunteer has self-scheduled, enter the volunteer’s name in the “search” box; then go to **Schedule** and scroll down to **Scheduled Activities > Activity** to see if the activity, date, and shift are assigned to the volunteer.

Reports of scheduled activities with the assigned volunteer names can be run in a variety of formats from **Reports > Schedule Reports** (examples follow).

**b. Administrator assigned (office staff).**

Very few of the URVC projects are “self-scheduling”. For most projects, the URVC office first must confirm with the project coordinator that a shift or activity still is open and a volunteer is needed. Or the volunteer must be directed by the office to sign-up on an organization’s website and not directly through Better Impact.

On the administrator Home page, look in the **Status Update** box for any volunteer sign-ups that must be confirmed. If the **Pending Signups** bar is highlighted, click on it to view the volunteers that are waiting assignment to an activity. After you have determined that the volunteer can be confirmed for a project or can go on to the next step such as registering on a website, assign the volunteer to the project.

\*Note: Refer to more detailed instructions in Better Impact section (page     )

7. Confirmation of assignments are provided to volunteers.
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Staff: Office

Process:

- 1) Email volunteer to confirm that their request has been received and/or accepted.
- 2) Provide detailed information needed to complete their assignment (e.g., register via a website).
- 3) Provide the coordinator’s contact information.
- 4) Provide a statement that this information also is contained in Better Impact in the informational button next to the activity/shift in their schedule tab.
- 5) Mail parking coupons for on-campus activities.

Details:

When volunteers sign up for an activity on MyVolunteerPage, a red box briefly appears that tells them either they are confirmed (self-scheduled activities) or that they are not yet assigned and will receive further information. This notification goes away too quickly to be easily noticed, and Better Impact is not able to slow down the speed of the notification box. Therefore, staff will need to notify volunteer that their request has been received.

**Note:** Volunteers who have checked the **Subscription** setting in MyVolunteerPage.com will receive an email reminder of their assigned activities for the next two weeks and a calendar view of their assigned activities. The volunteer must “opt-in” to this service; the administrator cannot enable it for a volunteer.

8. Assigned volunteers are recorded on the project sheets in project notebooks.

Staff: Office

Process: After assigning volunteer in BI, record it on the project sheet in the corresponding office notebook.

Details:

Assigned volunteers are recorded on the project sheets. (Office Staff)

At the time you assign a volunteer to a project in Better Impact, also record it on the project sheet in the office notebook. We will continue to use both the notebooks and Better Impact to maintain lists of projects and volunteers.

The Better Impact Schedule Reports can be printed to show who is assigned to a scheduled project, including a calendar report that shows dates when a shift is not filled. Use the “Single Activity by Date” or “Single Activity by Month.”

Volunteers are phoned to fill volunteer activities. (Office Staff)

Use the phone list in the project notebook to call volunteers. Assign volunteers to projects in Better Impact using the instructions listed in previous sections.

Project coordinators are provided the list of volunteers assigned to the project. (Office Staff)

Continue to email project coordinators the names and contact information of potential volunteers. Ask the coordinators to confirm the assignment with the volunteers and the URVC.

9. Volunteers are phoned to fill volunteer activities.

Staff: Office

Process: Use the phone list in the project notebook (generated by BI) to call volunteers who have indicated interest in this type of project. Assign them to projects in BI using instructions above and record on project sheet in 3-ring binder. Be sure to indicate that the person has been called, accepted or not, or if message has been left.

Details:

Volunteer hours are recorded in Better Impact (Sally)

a. Automatically recorded (scheduled projects)

Projects with a specific date and shift time will be set up to automatically record a volunteer’s hours after the date has passed.

b. Volunteer recorded (URVC member)

Volunteers are encouraged to enter their volunteer hours for “unscheduled” projects (e.g. those where hours are flexible). Many of these are on-going, rather than single-event, activities.

Instructions for the volunteer are found on their MyVolunteerPage home page under Files: *Users Guide for Volunteers*.

c. Administrator recorded (Sally)

At the end of each month, hours recorded for volunteers assigned to projects will be checked and missing hours will be entered by the administrator.

Add hours for a volunteer

1. In the search box, type in the volunteer's name.
2. In the menu under the volunteer's name, click the "Hours" tab,
3. Click "New Timelog Entry" button.
4. Select Activity from dropdown. If the activity does not appear under Recent, find it under Active or Inactive.
5. Enter date of activity and number of hours.
6. Click "Save." If you want to add hours for the same volunteer and same activity but on another date, click the "Save and Log Another" button; then enter the new date and hours.

Edit hours logged for a volunteer

1. In the "Hours" tab, hover over the "Options" icon to the left of the logged hours.
2. Options are View, Edit, Delete.
3. Select "Edit" to change the number of hours.
4. Select "Delete" to remove the hours.
5. Click the "Save" button.

10. Project coordinators are provided the list of volunteers assigned to the project.
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Staff: Office

Process: Continue to email project coordinators the names and contact information of potential volunteers. Ask the coordinators to confirm the assignment with the volunteers and the URVC.

Details:

Volunteer profiles must be maintained in Better Impact so that volunteers can be assigned to activities and credited with volunteer hours

1. Profile is updated by the volunteer in Better Impact. (URVC Member)

Current URVC volunteers can update their profile in Better Impact by logging onto MyVolunteerPage.com and clicking on the My Profile button on the upper right. A dropdown menu will allow them to update their contact information, password, interests, qualifications, and availability. The Additional Information box allows volunteers to report their affiliation with the University and their special skills or hobbies.

Administrators (URVC Office) do not receive notification of changes made by a volunteer to contact information or general interest preferences. Using Better Impact, rather than FileMaker

Pro, to create phone and email lists and to send out project announcements, will ensure the most current volunteer information is used.

## 2. Profile is added by a new volunteer into Better Impact. (New Volunteer)

A new volunteer should be encouraged to enter their own profile into Better Impact, rather than having the URVC office staff create the profile for them. This should reduce the number of volunteer surveys that are sent by the office to new volunteers. Volunteers can use the URVC webpage entitled Get Started (<https://urvc.umn.edu/get-started>) to link to the URVC application form. Volunteers will create their own username and password, fill out the application, and submit it.

At this point the URVC office will receive an email notification that an application has been submitted and must be accepted. In the Administrator's View, 1) enter the applicant's name in the search box, 2) click on the applicant's Miscellaneous tab and in the Status dropdown menu, select "Accepted". Click Save.

## 3. Administrator enters a volunteer profile for a person who does not log into the system (e.g. has no online access). (Office Staff)

For volunteers who do not have online access or are not comfortable using the Better Impact software, an administrator can enter those volunteer profiles. Required information that must be provided by the volunteer includes: first and last name; mailing address; phone number; and general interest preferences. An email address can be listed for those who have email and would like to receive URVC announcements via email, but do not wish to use Better Impact.

Follow these steps to add a volunteer profile:

1) From the menu bar, click on People and following the dropdown to Volunteers > Add a Volunteer

2) Click the box at the top of the Profile form that says:

"This profile represents a person who doesn't log into the system. If checked, a username and password will be automatically generated."

3) Fill out the form with the information provided to you by the volunteer.

The flagged items are required fields. If you don't have information for a required field, type "Please Update" in the field so that you can continue with the process. Try to get the missing contact information from the volunteer at a later time.

4) Scroll to the bottom of the form and select "Accepted" under the Status dropdown.

Save.

5) Check the volunteer's preferences for types of volunteer activities under the General Interests tab.

6) Add any other pertinent information provided such as qualifications or availability, using the appropriate tabs.

## 4. Profile is updated by the administrator (Office Staff)

- 1) Type in the volunteer's name in the Quick Search box.
- 2) Click on the volunteer's name from the list that appears.
- 3) From the volunteer's Main tab, select the section you wish to update.
- 4) Change the field and Save.

5. Profile is removed by the administrator. (Office Staff)

A volunteer is deceased, moves away, or resigns as a URVC member.

- 1) From the menu bar, click on People, and from the dropdown go to Volunteers > Remove Volunteers.
- 2) Under the Status Filter select the type of volunteer you wish to remove (e.g. accepted, inactive etc.).
- 3) Click on the Search button.

An alphabetical list of volunteers that match your filter will appear. Scroll down to the volunteer you wish to remove, hover over the dark square to the left of the volunteer name, and select "remove" from the dropdown list.

6. Profile is changed to inactive by the administrator. (Office Staff)

A volunteer is unable to participate in URVC activities, either short term or long term.

- 1) Type in the volunteer's name in the Quick Search box.
- 2) Click on the volunteer's name from the list that appears.
- 3) From the volunteer's Main tab, select the Miscellaneous.
- 4) In the Volunteer section select "Inactive" from the Status dropdown box.
- 5) Select a sort term or long term from the dropdown box
- 6) Save.status.

7. Profile is archived by the administrator. (Office Staff)

Archiving a volunteer will remove any previous activity assignments and general interests from the profile.

- 1) Type in the volunteer's name in the Quick Search box.
- 2) Click on the volunteer's name from the list that appears.
- 3) From the volunteer's Main tab, select the Miscellaneous.
- 4) In the Volunteer section select "Archived" from the Status dropdown box.
- 5) Select a Reason from the dropdown box
- 6) Click Save.

11. Enter volunteer hours in Better Impact.

Staff: Sally/Staff

Process: Projects are recorded:

- Automatically- Projects with a specific date and shift time will be set up to automatically record a volunteer's hours after the date has passed.
- Volunteer recorded – Volunteers are encouraged to enter their volunteer hours for “unscheduled” projects (e.g., flexible). Many of these are on-going.
- Administrator recorded –At the end of each month, hours recorded for volunteers assigned to projects will be checked and missing hours will be entered by the administrator.

12. Completed Activities are changed to inactive status.

Staff: Sally

Process: Scheduled activities that have passed the last scheduled shift or reached their maximum number of allowed volunteers will no longer be visible to volunteers on My Volunteer Page. Unscheduled activities that are no longer recruiting volunteers will remain visible to volunteers until they are deactivated by an administrator.

Details:

Completed activities or those no longer recruiting volunteers are changed to *Inactive* status.  
(Sally)

Scheduled activities that have passed the last scheduled shift or reached their maximum number of allowed volunteers will no longer be visible to volunteers on MyVolunteerPage. Unscheduled activities that are no longer recruiting volunteers will remain visible to volunteers until they are deactivated by an administrator.

Each month, the administrator will remove the “active” status of the both scheduled and unscheduled activities that are completed or no longer seeking volunteers.

## **Office Equipment**

Phone: 612-625-8016

Answer the phone: University Retirees Volunteer Center. This is (your 1<sup>st</sup> name).

If the red VCML light is flashing on the phone there is a voice mail message. Press \* 5 (STAR 5). You will be asked for the passcode. Press 4576586# and follow instructions.

Desktop Login: Username: .\URVCStaff263 Password: McNamara263

Email: [urvc@gmail.com](mailto:urvc@gmail.com) / mail.umn.edu

Email Login: Username: urvc Password: OFFICE263Mc

Printer: Turn on/off.

Keys: Located far left on desk in metal holder.

## **Office Supplies:**

Parking Vouchers for Projects: In file cabinet in “Parking” file.

Parking Vouchers for Staff: In file drawer under printer.

Envelopes: On shelf.

Stamps: In file drawer under printer.

Coffee: Bring your own mug. Enjoy!



## **Part II: Technology Basics**

### **6. Navigating Better Impact – Office Staff**

#### **Assigning volunteers to a scheduled activity:**

- In the search box, type in the volunteer's name.
- In the menu under the volunteer's name, click the "Assign" tab.
- Scroll down the projects, and click the link to the correct activity.
- Scroll down to Date, check the As (assigned) box for the desired date and shift.
- Click the "save" button.

#### **Assign volunteer to an unscheduled activity:**

- In the search box, type in the volunteer's name.
- In the menu under the volunteer's name, click the "Assign" tab.
- Scroll down the projects, and click the link to the correct activity.
- To assign the volunteer to the activity, click on "Assigned" button.
- Click "Save" button.

#### **Monitoring Volunteer Profiles:**

Administrators (URVC Office) do not receive notification of changes made by a volunteer to contact information or general interest preferences. Using Better Impact to create phone and email lists and to send out project announcements, will ensure the most current volunteer information is used.

#### **Required information is:**

1. First and Last name.
2. Email address.
3. Mailing address.
4. Phone number.
5. General interest preferences.

Administrators may remove files (e.g., move, resignation) or change to inactive status temporarily (e.g., "Snow Birds") or archive a volunteer's information.

## **Navigating Better Impact as a Volunteer**

Access: Go to: <https://urvc.umn.edu/get-started>

Enter: A Username and Password

Click the My Profile-Contact Information tab (on extreme right) to access:

Contact Information: Enter your contact information. Click Save. Review and complete these options:

- Add Photo: Click “Add Photo” to select and upload a photo from your computer’s photo library. Follow prompts.
- Privacy Settings: Review and select desired options. Click Save to activate selected options.
- Subscriptions. Sign up to receive a weekly email message reminder of the volunteer activities you are signed up for in the coming week.

Use the pull-down menu under My Profile to access:

Interest: Select the activity categories in which you have interest in volunteering. Click Save.

Qualifications: Indicate times during a typical week when you are available to participate in a volunteer activity. Click Save.

There are additional options on the My Profile menu which you may wish to explore and select. Next, continue on to access the other pages listed in the main (horizontal) menu.

Home: An introductory page with your name, photo (if you have provided one) and a list of the activities you have signed up for.

Opportunities: Lists activities needing volunteers. Projects are arranged in general interest categories. Scroll down to see full array. Click on activity title for complete project information, or the white circle with an “I” for brief project description. Scroll down to see a list of various shift times.

Select projects you wish to volunteer for. To sign-up for shifts, click on the faint square at the extreme right margin to select a specific shift. Scroll down to bottom of that set of options and click on Signup for Selected. If sign-up has been successful. Click the portrait silhouette for that project/shift to see if your name shows up.

Schedule: Displays your selected activities. Click view calendar to view as a calendar page.

Hours: Summarized number of hours volunteered. Enter hours under Recent, Active, or Inactive. Remember to enter hours weekly or at least by the end of each month.

Contact: This page identifies the people who staff the URVC office and provides a link for contacting the office by email. If you have problems navigating Better Impact site, please contact the URVC office at either [URVC@umn.edu](mailto:URVC@umn.edu) or 612-625-8016.

## **7. Working with the URVC Team Drive**

### **My Drive = Office Desk Drive**

Accessible to office staff only. Use for archives and internal office use.

### **Shared Drive = Team Drive.**

Accessible to anyone on the list. Created by Jenna (owner). Use for recent and on-going work (within current calendar year).

#### **How to Upload Files to Team Drive**

1. Go to Team Drive, click “New” on the left-hand side.
2. Click “File Upload” and it will give the desktop file.
3. Select the file you want.
4. Click “open” and it will upload to Team Drive.
5. Move the file into the “Current Projects” folder. (PROJECTS > CURRENT PROJECTS)

### **BI Project Categories: (Note: Each of these has several subcategories)**

- Assisting the Disabled (AD)
- Community Assistance (CA)
- Educator (EDU)
- Environment (Env)
- Evaluation (Eval)
- Event Assistance (Events)
- Medical (Med)
- Office Administration (OA)
- Social Welfare (SW)
- Stay-at-Home (SAH)
- Tax Preparers (TP)
- University Projects (UP)
- Usher/Greeter (UG)

### **Process:**

1. Download document to desktop.
2. Save in appropriate folders on desktop.
3. Upload copy to appropriate folder on Team Drive under Projects.
4. Maintain standardized labeling:

Document Name\_\_Category\_\_Year

## 8. Monitoring the URVC Website

<http://urvc.umn.edu/>

The URVC site is managed under T2: “VCSH” (Video Collaboration Storage Hosting).

The link to find Drupal Consultants:

<<https://it.umn.edu/drupal-consultants-available-through>>

They recommend contacting Origin Eight and Electric Citizen because they have the most experience with our platform. Ten 7 Interactive and Nighthawk Marketing have some familiarity as well.

For further assistance see: <https://it.umn.edu/technology-help-our-staff>

### **DRUPAL:**

The site is set up in Drupal Lite (version 7). Upgrade to Drupal Enterprise 8 is recommended. IT Help can provide names of consultants to help with upgrade.

IT assistance is available from 1-HELP.

Training for Drupal is available from: <https://it.umn.edu/technology/drupal>

**Projects to highlight:** Go through current projects and arrange to take photos to upgrade to more recent photographs.

**Bi-Annual Updates:** Make changes and updates at least twice a year. Get input from Board.

## **Part III. Project Folders**

Each 3-ring binder contains fillable forms to complete with information on the volunteer opportunity and the volunteer's information. Forms are located in the office shelves by category.

Project Categories include the following examples:

### **9. Tutoring**

Reading -- MN Literacy Council, Murray Jr. H.S.

Math --- Murray Jr. H.S.

### **10. Ushering/Greeters**

Rarig Center --- Music, Drama

Vocal Essence --- Choral

### **11. Health/Research**

Medical --- Research Projects

### **12. One-Time/On-Going**

Harvest Bread --- Packaging, Delivery

Mock Trials --- Judging

## **General Instructions:**

New project forms are in boxes on the shelf next to phone books. There are 5 types of projects: One-Time; On-Going; Ushering; Research, and Tutoring. There are four 3-ring binder books, one for each project type, except for Tutoring (in a manila folder). If you take a request for a project get all the information needed to fill out the form so the office staff will explain it to volunteers. Place it in the appropriate book. The projects should be kept in chronological order with the current ones in the front.

A paper clip at the top of a project form means the project is not completed and calls are still to be made. When you file a new project place a paper clip on the page top and note this in the daily journal.

Volunteer Prospects for a Project:

There are project categories to fit types of projects (See People Resources Number Codes on wall. eg. 01 Bloodmobile Support).

Each volunteer has chosen types of projects for which to be contacted. We have print-outs of volunteer names and phone #s for each category (and Email lists). These print-outs are in Better Impact data base. When a project is created the appropriate call list(s) should be placed behind the project form in the 3-ring binder. You can print out a list by selecting the category # in the "volunteer" data base

## **Part IV. Engaging with Volunteers**

### 13. Volunteer Profiles

Volunteer profiles must be maintained in Better Impact so that volunteers can be assigned to activities and credited with volunteer hours (see section on Better Impact).

### 14. Volunteer Reports

Reports can be generated in Better Impact (BI).

### 15. Special Events

The URVC sponsors an annual appreciation event for volunteers every year.

Other events to help with recruiting and appreciation are:

1. Monthly birthday coffees (pending).
2. Awards for most hours volunteered annually (pending).
3. Family potluck picnic (pending).