

Volunteer Lifecycle

VSys Webinar – Fall 2011

Intro

This webinar is designed to assist in following a volunteer through all steps in their volunteering history. VSys offers several options to help manage each stop along the way. From initial interest to final contact, there are values you can use to identify where they are and where they have been.

Dates:

The following date fields are manually entered into VSys

- Date created – when a person’s record is first added to VSys. This is a system setting and usually has little to do with the state of your volunteer, though it can be useful to see when a record was added into the database.
- Date Started – a one-time entry that signifies when the volunteer started with your organization. This could be used in multiple ways, depending on what your definition of started is. Note: this field is not connected to hours records, if you use the first hours volunteered to represent when they started this field either needs to be edited manually or can be ignored.
- Date Active – when the person most recently became active.
- Date Inactive – when the person most recently became inactive.

Statuses:

Not all statuses need to be used by all organizations, here is a list of all available statuses and how they might be used

- Active – volunteer is currently in the organization (use with “Date active”)
- Inactive – volunteer has left the organization (use with “Date inactive”)
- Prospect – for a potential volunteer who has expressed interest
- Applicant – for a volunteer currently in process to become active
- Terminated – a volunteer who has been asked to leave (considered “inactive” internally, use “Date inactive”)
- Rejected – for a volunteer who was a prospect or applicant that didn’t “make the cut” (considered “inactive” internally, use “Date inactive”)

- Leave of absence – for a volunteer on a short term leave with expected return (considered “inactive” internally, use “Date inactive” and “inactive followup”)
- Special – a wild-card value for organizational use when nothing on list is quite right
- New web applicant - for applications submitted via VSys Web

“Super statuses”:

These statuses are independent of the status, so they can be mixed and matched, but in most cases you would change a volunteer from active to another status before updating the following values.

- Archived – volunteer is not expected to come back (specific reasons, date and comments can be added)
- Banned – volunteer is explicitly forbidden to come back to organization (can be permanent or use with “Ban expiration” to consider reinstatement, specific reasons, date and comments can be added)
- Deceased – a volunteer who has passed away (use with “date deceased” to track date of death or when organization was made aware.

Transitions:

These values are automatically added to existing records in VSys. When a person is updated in the areas of status, person type, group, and others, an entry in the transitions section of the person editor will be made. This can help you determine what changes the volunteer has made over their lifetime.

Filters and reporting:

Some options for finding people in each status or date range.