CITK

Implementing Volunteer Management

Implementing Volunteer Management in CITK

Managing volunteers effectively involves **scheduling, training, and acknowledging** their contributions. Here's a step-by-step guide to set up and manage volunteers using GoHighLevel:

1. Setting Up Volunteer Profiles

Step 1: Create Custom Fields for Volunteer Information

1. Navigate to Settings: Go to Settings > Custom Fields.
2. Create New Custom Fields: Click on + Add Field.
3. Create the following custom fields:

- Volunteer Role:Single Select (e.g., Usher, Greeter, Sunday School Teacher)
- Availability:Multi Select (Days and Times)
- Preferred Service:Single Select (e.g., Sunday Morning, Evening Service)
- Skills and Experience:Textarea

Group the Fields into a Section:

+ Add Section

Volunteer Information

2. Creating Volunteer Sign-Up Forms

Step 2: Design Volunteer Registration Forms

1. Navigate to Forms: Go to Marketing > Forms.
2. Create a New Form: Click + Create New Form.
3. Design the Form Fields: Add the following fields:

- First Name:First Name
- Last Name:Last Name
- Email Address:Email
- Phone Number:Phone
- Volunteer Role:Dropdown (e.g., Usher, Greeter, Sunday School Teacher)
- Availability:Multi-Select (Days and Times)
- Preferred Service:Dropdown (e.g., Sunday Morning, Evening Service)
- Skills and Experience:Textarea

4. Form Settings: Set the Form Name to Volunteer Registration Form, enable Sticky Contact to On, and configure the Submit Action with a message and redirect URL.
5. Click Save Form: Click Save Form and Integrate Form.

Step 3: Embed the Volunteer Registration Form on the Website

1. Navigate to Website or Funnels: Go to Sites > Funnels/Website.
2. Create a Volunteer Sign-Up Page: Click + Add Funnel/Website > Create New Funnel. Choose a template or create a new one from scratch.
3. Add the Volunteer Registration Form to the Page: Click Edit Page, drag the Form element onto the page, and select the Volunteer Registration Form.
4. Click Save and Exit: Click Save and Exit.

3. Creating Workflows for Volunteer Management

Step 4: Automate Volunteer Scheduling and Communication

1. Navigate to Workflows: Go to Automation > Workflows.
2. Create a New Workflow: Click on + Create Workflow and name it Volunteer Management Workflow.
3. Set Up the Workflow Trigger: Click + Add New Trigger, choose Form Submitted, and select the Volunteer Registration Form.
4. Add Workflow Actions: For example, send a volunteer welcome email by clicking + Add New Action and choosing Send Email.

Email Configuration

Subject: Welcome to the Volunteer Team at [Church Name]!

Hi {{contact.first_name}},

Thank you for signing up as a volunteer at [Church Name]. We're excited to have you join the team!

Role: {{contact.volunteer_role}}

Preferred Service: {{contact.preferred_service}}

We will reach out with more details soon.

Blessings,

[Your Name]

[Your Role]

- Click **Save Action**.

B. Send Volunteer SMS Acknowledgment (Optional)

- Click + Add New Action.
- Choose Send SMS.
- Configure the SMS:

🙌 Hi {{contact.first_name}}, thank you for volunteering at [Church Name] as a {{contact.volunteer_role}}! We'll reach out soon with more details.

- Click **Save Action**.

C. Assign the Volunteer to a Team Member

- Click + Add New Action.
- Choose Assign to User.
- Select the team member(s) responsible for managing volunteers.
- Click Save Action.

D. Schedule Volunteer Training Session

- Click + Add New Action.
- Choose Wait.
- Set the wait time to 2 Days.
- Click + Add New Action after the wait.
- Choose Send Email.
- Configure the email:

Subject: Invitation to Volunteer Training Session on {{training_date}}

Hi {{contact.first_name}},

We'd like to invite you to a volunteer training session on {{training_date}} at {{training_time}}.

Training Date: {{training_date}}

Training Time: {{training_time}}

Location: [Church Address]

Let us know if you have any questions.

Blessings,

[Your Name]

[Your Role]

- Click **Save Action**.

5. Activate the Workflow

Click

and toggle the switch to activate the workflow.

4. Scheduling Volunteer Shifts and Events

Step 5: Create Calendars for Volunteer Shift Scheduling

1. Navigate to Calendars: Go to Calendars > Calendar Settings.
2. Create New Volunteer Calendars: Click + New Calendar.
3. Create calendars for each department or ministry:

- Usher & Greeter Calendar: Track volunteer shifts for ushers and greeters.
- Sunday School Calendar: Schedule Sunday School teachers and assistants.
- Worship Team Calendar: Manage worship team members and choir rehearsals.

4. Configure Calendar Settings: Set names like Usher & Greeter Calendar, assign team members, and select the Volunteer Registration Form.
5. Set Up Calendar Availability: Add slots for each shift or event and define the available roles.
6. Embed Volunteer Shift Calendar on the Website: Create a landing page or add the calendar to an existing volunteer page using the embed code or URL.

5. Tracking Volunteer Activity & Reporting

Step 6: Monitor Volunteer Activity via Custom Reports

1. Navigate to Custom Reports: Go to Reports > Custom Reports.
2. Create a New Custom Report: Click on + New Report and name it Volunteer Management Dashboard.
3. Add Relevant Data to the Report: Click + Add New Widget and choose data sources like Forms, Calendars, and Workflows.
4. Customize the Dashboard: Rearrange widgets for better visibility and add filters for specific volunteer roles or teams.</

A. Send Volunteer Appreciation Email:

1. Click + Add New Action.
2. Choose Send Email.
3. Configure the email:

Subject: Thank You for Your Service at [Church Name]!

Hi {{contact.first_name}},

We want to take a moment to thank you for your dedication and service as a volunteer at [Church Name]. Your impact is felt throughout our community!

As a token of appreciation, we invite you to our Volunteer Appreciation Event on {{event_date}}.

Event Date: {{event_date}}

Event Time: {{event_time}}

Location: [Church Address]

Looking forward to seeing you there!

Blessings,

[Your Name]

[Your Role]

- Click **Save Action**.

B. Send SMS Appreciation Message (Optional):

1. Click + Add New Action.
2. Choose Send SMS.
3. Configure the SMS:

🙌 Hi {{contact.first_name}}, thank you for your dedication to [Church Name]. We appreciate your service!

- Click **Save Action**.

5. Activate the Workflow:

- Click **Save** and toggle the switch to activate the workflow.

7. Additional Tips

- Volunteer Training Reminders: Send automatic reminders for training sessions.
- Volunteer Skills Database: Build a searchable database based on skills.
- Automated Role Assignment: Use workflows to automate volunteer role assignments.
- Feedback Collection: Collect volunteer feedback using custom surveys.

Let me know if you need further assistance or clarification on any step!

Build God's House with Excellence

Whatever you do, let these verses inspire you to carry out all your tasks with dedication, excellence, and a sincere heart aimed at honoring God.

Colossians 3:23-24 "Whatever you do, work at it with all your heart, as working for the Lord, not for human masters, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving."

Proverbs 16:3 "Commit to the Lord whatever you do, and he will establish your plans."

Ephesians 6:7-8 "Serve wholeheartedly, as if you were serving the Lord, not people, because you know that the Lord will reward each one for whatever good they do, whether they are slave or free."

Galatians 6:9 "Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up."