

Sign Up Workflow Methods

Reviewing set up scenarios for how users can register

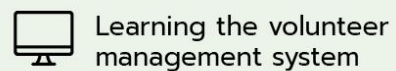
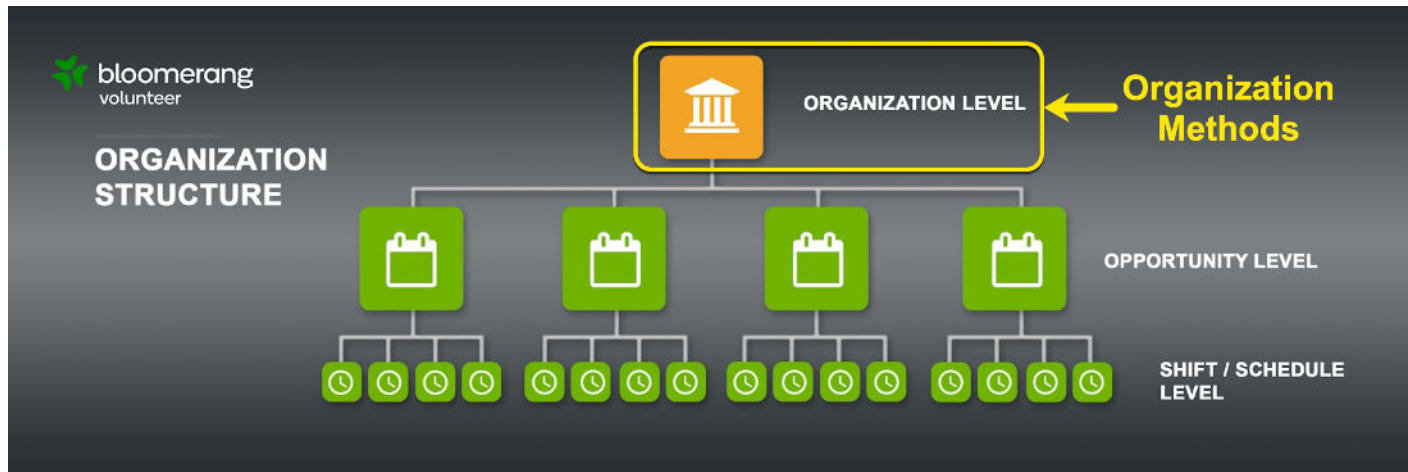


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Organization Methods

Organization methods are a way to design recruitment workflows at the highest level of the system. Typically, this is a top-down workflow where users would enter the system at the Organizational Level, and from there view and sign up to opportunities.



1 Gate and Approve

◆ What is the Gate and Approve Method?

This is when an Organization is required to review a volunteer's form question responses before granting them full access to the system. This screening method is a great way to determine if a volunteer is a good fit for your organization by gauging their experience, training or qualifications before they can access the Opportunities the Organization is offering. Once a volunteer is approved into the system, they will be able to sign up for any Opportunities that they are qualified to see.

⚙️ **Volunteer Workflow:** *View Organization → Register to Organization → Get Approved Into Organization → View Opportunities → Register to Opportunity*

✓ Pros of using this method

- *Each volunteer is properly screened before being granted access.*

✗ Cons of using this method

- *The registration process for volunteers is drawn-out.*

2 “Come Join Us!”

◆ What is the “Come Join Us!” Method?

This method allows volunteers to sign up directly to the organization without any approval gates but does not reveal any opportunity information until their information is collected. Once a volunteer has registered, they will then be presented with available opportunities to work based on their qualifications. This method is great for any Organizations that have an existing volunteer base that they are bringing with them into the new system.

⚙️ **Volunteer Workflow:** *View Organization → Register to Organization → View Opportunities*

✓ Pros of using this method:

- *Opportunity information is kept hidden from the public.*
- *The registration process for volunteers is shortened.*

✗ Cons of using this method:

- *Volunteers won't know if they are available to work until the Opportunity information is presented to them. This could result in some false-starts and/or initial attrition.*

3 The Public Opportunity Buffet

◆ What is the Public Opportunity Buffet Method?

This method allows the Organization to promote their opportunities to the public, and have volunteers sign up directly to opportunities without having to first go through the organization level. This will allow volunteers to scope out all of the organization's publicly available opportunities before they register. This is a good self-screening method to only collect volunteer information once the volunteer has reviewed the opportunity and decides they want to commit.

⚙️ **Volunteer Workflow:** *View Opportunities* → *Register to Opportunity*

✓ Pros of using this method:

- *Opportunities can be promoted to the public to gain interest.*
- *Volunteers will know whether they can commit ahead of registering.*

✗ Cons of using this method:

- *Volunteers will have access to all of the Opportunity information ahead of registering, and may show up without registering.*

4 A Little Bit of Everything

◆ What is the A Little Bit of Everything Method?

This method is a combination of “The Public Opportunity Buffet” and the “Gate and Approve” methods. Like the Gate and Approve method, the Organization requires a standard gated registration process that volunteers must go through before they can access Opportunities. However, the Organization will also have certain ‘public’ opportunities that run differently and may not require volunteers to complete the formal sign up process. For example, an Organization is hosting a major event outside of their internal day-to-day operations that they want the public to view and sign up for.

⚙️ **Volunteer Workflow:** *View Organization → Register to Organization → Get Approved Into Organization → View Opportunities → Register to Opportunity*

⚙️ **Volunteer Workflow:** *View Opportunities → Register to Opportunity*

✓ Pros of using this method:

- *Each opportunity behaves independently and has their unique sign up workflows.*

✗ Cons of using this method:

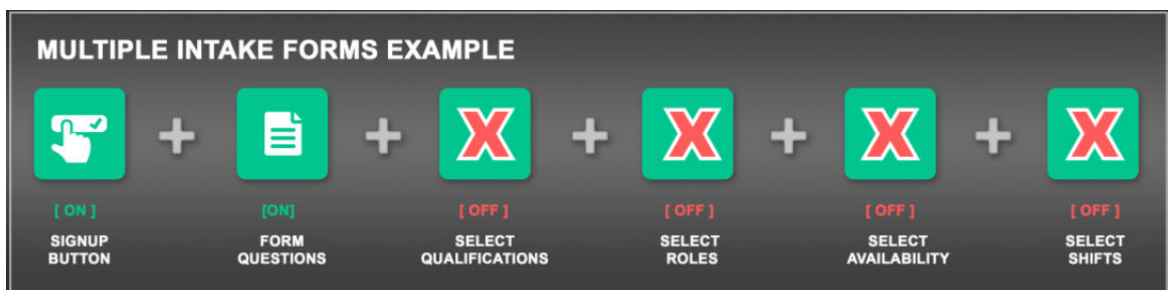
- *Multiple sign up methods across opportunities could confuse volunteers, as they will be presented with a different experience each time they register.*
- *Some opportunities will be ‘hidden’ to volunteers, and they might find out about their existence through a third party and be confused as to why they can’t see it.*

5 Multiple Intake Forms

◆ What is the Multiple Intake Forms Method?

This method is designed for Organizations that require separate groups of their volunteers to fill out completely different intake forms. An opportunity can be created for the sole purpose of leveraging its registration form. Each opportunity can operate as a separate intake form and be configured for each group of volunteers. This method is great for keeping groups separated and organized with all of the information collected in one centralized place.

⚙️ **Volunteer Workflow:** *View Opportunity → Register to Opportunity → Fill in Form*



✓ Pros of using this method:

- *Multiple intake forms can be generated.*

✗ Cons of using this method:

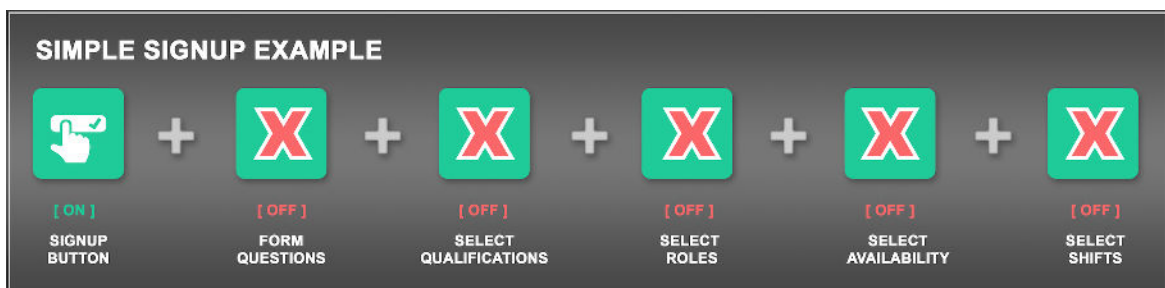
- *A new Opportunity must be created for each form.*

6 Opportunities as Shifts

◆ What is the Opportunities as Shifts Method?

This method is typically used by Organizations that are smaller in size, and do not need to leverage every level of the system. Using this method, Opportunities can be redefined as Shifts, where the date and time of the opportunity is presented. There are no additional sign up steps enabled in the opportunity, allowing users to 1-click sign up, and the robust schedule within the opportunity does not need to be leveraged. In addition, these Shift-style opportunities can be categorized into groups using tags. Groups of shift-style opportunities can then be defined as programs or opportunities taking place within the organization itself.

⚙️ **Volunteer Workflow:** *View Opportunity → Register to Organization → Sign Up to Shift-style Opportunities*



✓ Pros of using this method:

- *Simplifies workflows for smaller organizations and the deeper heavier schedule layer does not need to be leveraged.*
- *If a shift becomes more complex, the schedule layer can always be enabled.*

✗ Cons of using this method:

- *If you require heavier scheduling and many shifts; leveraging opportunities as shifts may become unmanageable.*

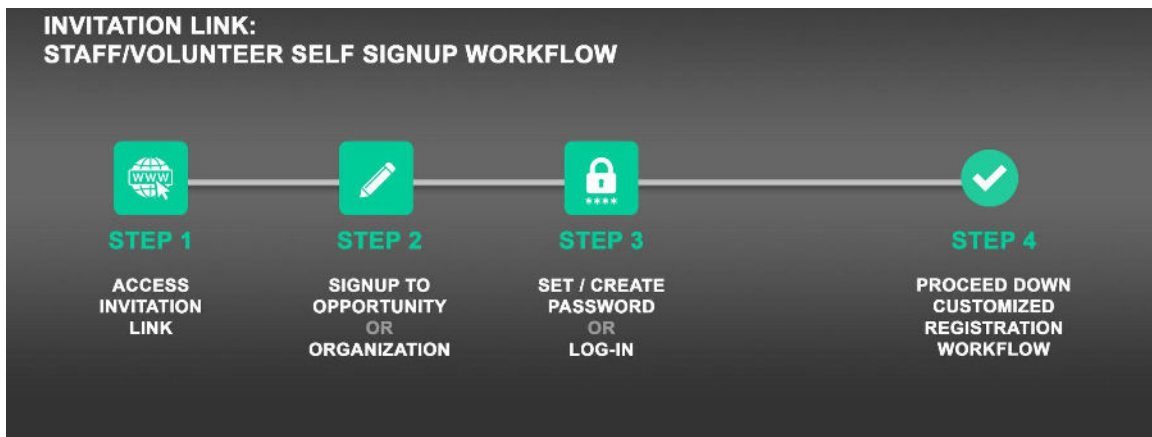
7 Import and Invite

◆ What is the Import and Invite Method?

This method will be a good fit for your Organization and/or Opportunity if you have an existing database of users that you want to bring over into the Bloomerang Volunteer system. The invitation can be achieved through an email automation or manual action that will let users know where they need to go in order to claim their new accounts.

⚙️ **Volunteer Workflow:** *Receive Invitation via Email → View Organization/Opportunity → Create Account → Register*

✓ Pros of using this method:



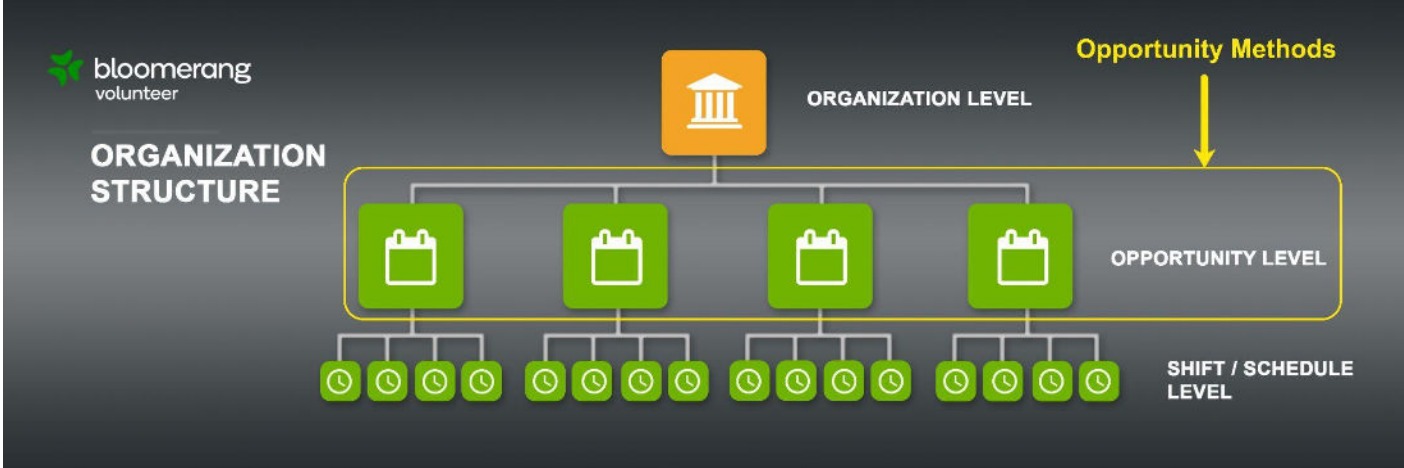
- *Volunteers will be notified about the new system.*

✗ Cons of using this method:

- *Importing can result in old data and inactive volunteers getting migrated over to a new system. Some Organizations prefer to start fresh and only invite users to join.*

Opportunity Methods

Opportunity methods are a way to design recruitment workflows at the lowest level of the system. Typically, this is a bottom-up workflow where users would enter the system at the Opportunity Level, and from there get added to the Organization Level.



1 One Opportunity to Rule Them All

◆ What is the One Opportunity/Schedule to Rule Them All Method?

This method is used by Organizations that want to run all of their operations in one central hub within the constraints of a single opportunity and schedule. This method is typically used for larger short-term operations such as an Event (for example, festivals, fundraisers, conferences, ceremonies, sporting events, academic events, etc) with a heavy schedule. Volunteers would sign up directly to the Opportunity without having to first go through the Organization Level.

⚙️ **Volunteer Workflow:** *View Opportunity → Register to Opportunity*

✓ Pros of using this method:

- *Volunteers will have one place/URL to go to register.*
- *The Opportunity can be easily duplicated for the next operation.*

✗ Cons of using this method:

- *If you require more data silos within the Opportunity, it may be best to break things out into multiple opportunities instead of hosting everything in just one.*

2 One Schedule, Multiple Opportunities

◆ What is the One Schedule, Multiple Opportunities Method?

This method is typically used by Organizations that are smaller in size and do not need to leverage every level of the system. Using this method, shifts can be redefined and categorized into groups using tags. Groups of Shifts can then be defined as programs, events and/or opportunities taking place within the opportunity itself. Volunteers would sign up directly to the Opportunity without having to first go through the Organization Level, and will always be directed to the same place for signing up.

⚙️ **Volunteer Workflow:** *View Opportunity → Register to Opportunity*

✓ Pros of using this method:

- *Volunteers will always have one place/URL to go to register. Having*

✗ Cons of using this method:

- *If the Organization has many opportunities, managing them in groups of shifts could become unmanageable.*

3 Early Bird Sign Up

◆ What is the Early Bird Sign Up Method?

This method provides Opportunities with a way to grant a subset of volunteers early access to the system, where they can register ahead of the crowd and claim first dibs on shifts and roles. This method can be used to reward their more dedicated/senior volunteers by letting them choose first. It can also be used to slow down and stage-deliver the registration process, giving Administrators more time to process applications and not get overwhelmed with a volume of sign ups.

⚙️ **Volunteer Workflow:** *Receive Invitation to Opportunity → Register to Opportunity*

✓ Pros of using this method:

- *Administrators can stage-deliver the registration process to stay ahead of processing time.*
- *A subset of volunteers can access the system before anyone else can.*

✗ Cons of using this method:

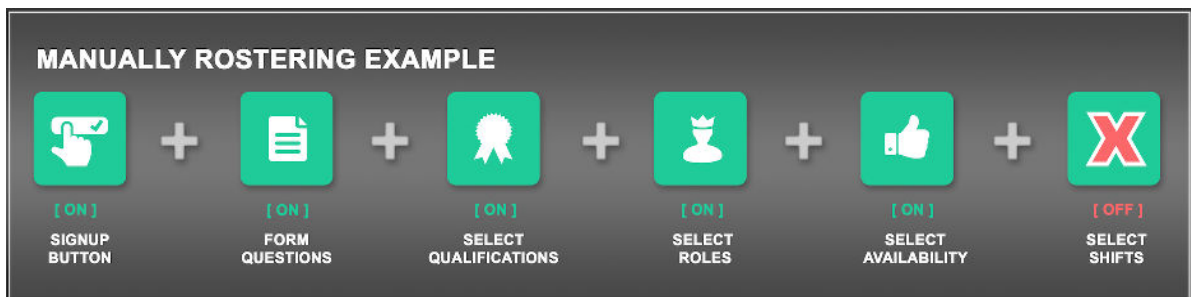
- *Some users will not get first-pick and could be seen as 'unfair' if they are granted access later on than everyone else.*

4 Roster and Confirm

◆ What is the Roster and Confirm Method?

This method will be a good fit for your Opportunity if Administrators require full control over the schedule, and the placement of volunteers into shifts needs to be done strategically. In this scenario, volunteers do not select their own shifts; Administrators will choose to manually schedule them into shifts using the *RosterMode™* Engine. To ensure maximum attendance, send shift confirmation requests to volunteers and have them validate their presence.

⚙️ **Volunteer Workflow:** Register to Opportunity → Fill in Form Questions → Select Roles → Select Qualifications → Fill in Availability → Select Shifts



✓ Pros of using this method:

- Administrators have full control over who gets scheduled where.

✗ Cons of using this method:

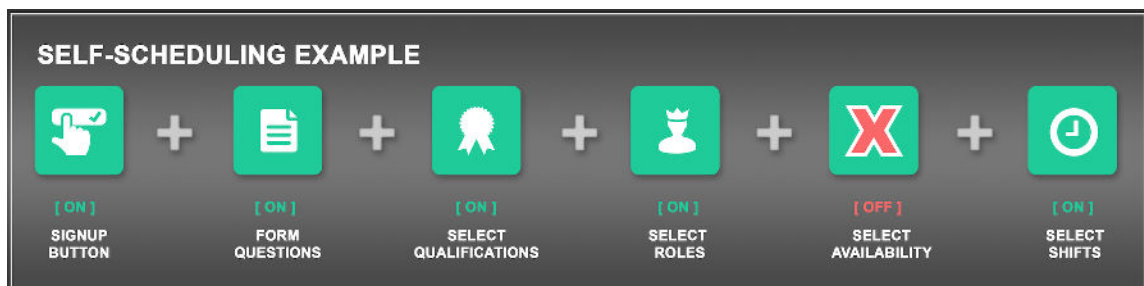
- This method can be more time consuming for the administrator.

5 Self Schedule

◆ What is the Self Schedule Method?

This method will be a good fit for your Opportunity if you are aiming to save administrative time by allowing volunteers to self-schedule instead of rostering them manually. This is a recommended method, as volunteers tend to be more accountable when they select their own schedule.

⚙️ **Volunteer Workflow:** Register to Opportunity → Fill in Form Questions → Select Roles → Select Qualifications → Fill in Availability → Select Shifts



✓ Pros of using this method:

- This method is less time consuming for administrators.

✗ Cons of using this method:

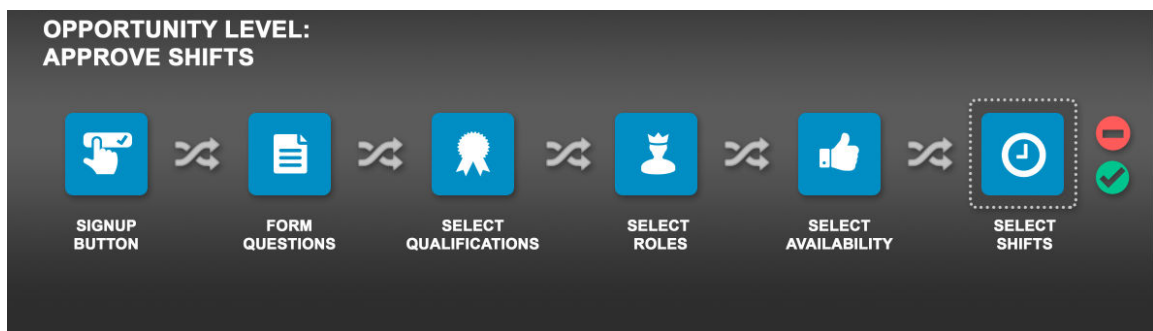
- Administrators have less control over who gets scheduled where.

6 Self Schedule and Approve

◆ What is the Self Schedule and Approve Method?

This method will be a good fit for your Opportunity if you want to allow volunteers express interest in shifts, while maintaining full control over final placements. In this scenario, volunteers can only join the waitlist on a Shift, and administrators can manually approve them into the shift. This screening method is a great way to determine if a volunteer is a good fit for your shifts, and can be a great way to collect a pool of interested volunteers.

⚙️ **Volunteer Workflow:** Register to Opportunity → Fill in Form Questions → Select Roles → Select Qualifications → Fill in Availability → Select Shifts



✓ Pros of using this method:

- This method creates a pool of interested candidates on shifts, reducing administration time when manually scheduling.
- Administrators have final say over who gets scheduled where.

✗ Cons of using this method:

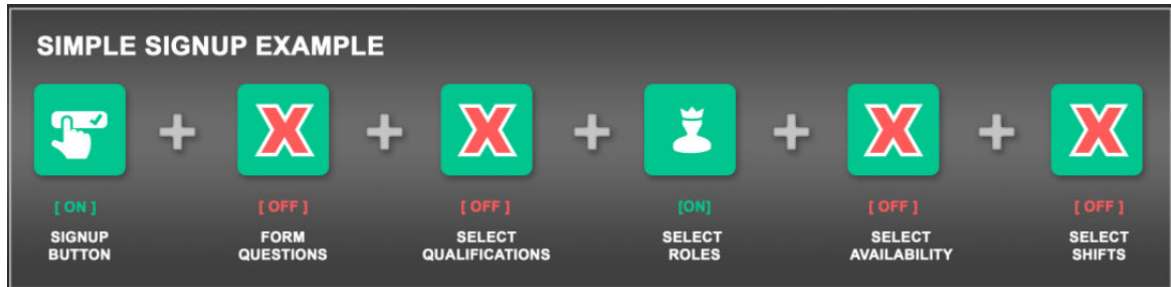
- This method can be more time consuming for the administrator, as they will have to manually approve users into the shifts.

7 Self Sign Up With No Schedule

◆ What is the Sign Up with No Schedule Method?

This method will be a good fit for your opportunity if there are no heavy schedule requirements, and volunteers need to sign up for just a simple task and/or timeslot. Using this method, Roles can be redefined as Shifts and/or Tasks, and only that step will be enabled in the sign up workflow. Volunteers will be able to sign up to a preferred task and/or timeslot without having to be scheduled, and the robust schedule within the opportunity does not need to be leveraged.

⚙️ **Volunteer Workflow:** Register to Opportunity → Fill in Form Questions → Select Roles



✓ Pros of using this method:

- *Simplifies workflows for smaller opportunities and the deeper heavier schedule layer does not need to be leveraged.*
- *If scheduling requirements become more complex, the schedule layer can always be enabled.*

✗ Cons of using this method:

- *This method is not designed for heavy schedule requirements.*
- *If you require heavier scheduling methods, leveraging Roles might become unmanageable.*