

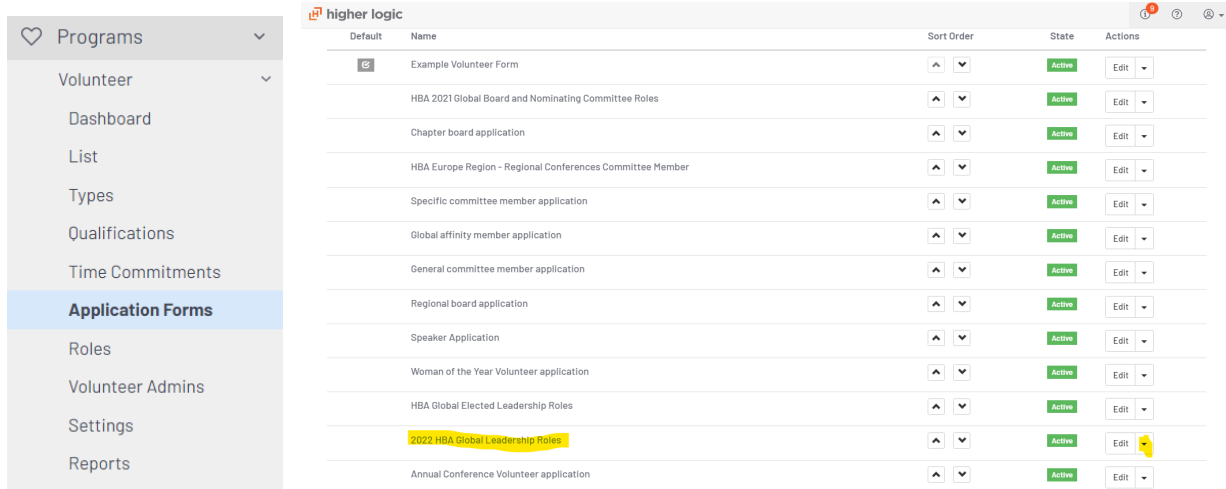
Global nominating committee

Last Modified on 06/24/2021 2:16 pm EDT

Getting to volunteer module

Opening a new role

1. Locate and copy application form from previous year – recommended titling by year:



The screenshot shows the Higher Logic interface. On the left is a navigation menu with the following items: Programs (with a heart icon and dropdown arrow), Volunteer (with a dropdown arrow), Dashboard, List, Types, Qualifications, Time Commitments, Application Forms (highlighted in blue), Roles, Volunteer Admins, Settings, and Reports. The main content area displays a table of application forms. The table has columns for Default, Name, Sort Order, State, and Actions. The '2022 HBA Global Leadership Roles' row is highlighted in yellow. The 'Edit' button for this row has a yellow cursor icon pointing to it.

Default	Name	Sort Order	State	Actions
<input checked="" type="checkbox"/>	Example Volunteer Form	▲ ▼	Active	Edit ▼
	HBA 2021 Global Board and Nominating Committee Roles	▲ ▼	Active	Edit ▼
	Chapter board application	▲ ▼	Active	Edit ▼
	HBA Europe Region - Regional Conferences Committee Member	▲ ▼	Active	Edit ▼
	Specific committee member application	▲ ▼	Active	Edit ▼
	Global affinity member application	▲ ▼	Active	Edit ▼
	General committee member application	▲ ▼	Active	Edit ▼
	Regional board application	▲ ▼	Active	Edit ▼
	Speaker Application	▲ ▼	Active	Edit ▼
	Woman of the Year Volunteer application	▲ ▼	Active	Edit ▼
	HBA Global Elected Leadership Roles	▲ ▼	Active	Edit ▼
	2022 HBA Global Leadership Roles	▲ ▼	Active	Edit ▼
	Annual Conference Volunteer application	▲ ▼	Active	Edit ▼

2. Locate and update "acknowledgement email (global) template:

Category: Volunteer, Community: [], Opt-Out Group: [] Create

Active: On Inactive Off System: Off Non-System Off

Name	Community	Category	Opt-Out Group	System	Active	Actions
Accept/Approve (Default)		Volunteer	System	False	True	Edit
Accept/Approve Flagship		Volunteer	System	False	True	Edit
Acknowledgement (Default)		Volunteer	System	False	True	Edit
Acknowledgement (Regional)		Volunteer	System	False	True	Edit
Acknowledgement email (global)		Volunteer	System	False	True	Edit

3. Locate and copy previous years' role in system; you may have to filter to see roles whose deadlines have already passed

higher logic 9 ? ⌂

Volunteer Opportunities - Admin

Hide Filter

Time Commitment: Types of Opportunities: Qualifications:

Communities: Opportunity Status: Opportunity Name:

Apply Filter Reset Filter

Create Opportunity

Showing 1 to 1 of 1 Start Date - Earliest to Latest All 10 per page

Details	Actions
<p>HBA 2022 HBA Global Board of Directors and Nominating Committee</p> <p>Location: Online Opportunity Type: Global Board Starts: Saturday, January 01, 2022 Ends: Saturday, December 31, 2022</p> <p>Accepting Applications 0 invitations sent 0 applications awaiting approval 0 approved for 9 slots</p>	<p>Edit</p>

4. Update opportunity text to include updated dates, links to role descriptions, FAQs, etc.

- Chose new application form
- Set primary contact (who should receive notification of applications and who is listed on the opportunity page)
- Set dates (if not done in previous step)
- Set acknowledgement email template to "acknowledgement email (global)"

Email Templates

Invitation: Note: Message sent to volunteers invited to apply for the opportunity.

Nomination: Note: Message sent to volunteers nominated to apply for the opportunity. A value of 'Do not Send' will hide the Nominate Volunteers block on the Opportunity Detail page and users will be unable to nominate others for the affected opportunities.

Acknowledgement: Note: Message sent to those who have signed up for the auto-approve opportunity.

5. Click "next step: application builder"

- No edits needed on this page

6. Click "next step: invitations"

- **IMPORTANT:** slide blue dot all the way to the left to make the number of preselected volunteers 0

Create New Volunteer Opportunity

Details
Application Builder
Invitations
Add Specific Volunteers

Preselected Volunteers

Adjust requirements

Invitation to volunteer

0 volunteer(s) matched this opportunity's requirements

Tighter

 Loosen

Note: You should invite 81 people to get the 9 applications needed. Loosen or tighten the slider as needed.

List of Invitees 0
Find and Invite Others

<-- Back
Last Step: Add Specific Volunteers -->
Cancel

7. Click "last step: add specific volunteers"

8. Click "finish"

9. To view the opportunity live, find the opportunity by using the filter and choose "view opportunity details" from the drop-down:

HBA 2022 HBA Global Board of Directors and Nominating Committee

Location: Online Opportunity

Type: Global Board | Starts: Saturday, January 01, 2022 Ends: Saturday, December 31, 2022

Accepting Applications [0 invitations](#) sent | [0 applications](#) awaiting approval | [0 approved](#) for 9 slots

Edit ▼

- Manage Applicants
- Rate Applicants
- Invite Others
- Put on Hold
- View Opportunity Details
- Reports
- Copy
- Delete

Reviewing an application

1. Find role in system; you may have to filter to see roles whose deadlines have already passed

2. Click "X applications awaiting approval"

3. Click "view application"

Waiting for Approval (1)
0 confirmed for 1 slots (1 needed)
Invitations Sent (0)
Rejected (0)
Waiting for Rating (0)
Completed (0)

Select All Showing 1 to 1 of 1

Enter a Name or Company

Submitted - Most Recent ▼

Details	Nominations	
<input checked="" type="checkbox"/> <div style="display: flex; align-items: center; margin-top: 5px;"> <div> <p>Heather Wargo</p> <p>305 Southglen Dr, Cary, NC 27518, United States</p> <p>1200 potential points ⓘ</p> </div> </div>	0	Submitted 19 days ago View Application ▼

Approve Selected
▼

Copy and paste the text from the application to a Word doc and save as PDF; download resume/CV; share PDF and resume/CV with current nominating committee

Approving an applicant

1. Find role in system; you may have to filter to see roles whose deadlines have already passed
2. Click "X applications awaiting approval"
3. Select individuals by clicking to be approved and click "approve selected"

The screenshot shows a dashboard with several status tabs: "Waiting for Approval (1)", "0 confirmed for 1 slots (1 needed)", "Invitations Sent (0)", "Rejected (0)", "Waiting for Rating (0)", and "Completed (0)". The "Waiting for Approval (1)" tab is active. Below the tabs, there is a "Select All" checkbox, "Showing 1 to 1 of 1", a search box "Enter a Name or Company", and a dropdown menu "Submitted - Most Recent". The main content area is a table with two columns: "Details" and "Nominations". The "Details" column contains a yellow checkmark icon, a profile picture of Heather Wargo, her name, address "305 Southglen Dr, Cary, NC 27518, United States", and "1200 potential points". The "Nominations" column shows "0" and "Submitted 19 days ago". A "View Application" button is visible. At the bottom, there is a yellow "Approve Selected" button.

Pulling report of applicants

Your browser does not support HTML5 video.
