

Opening a new role

Last Modified on 06/22/2021 2:47 pm EDT

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

The screenshot shows the Higher Logic interface with a sidebar on the left containing navigation options: Programs, Volunteer, Dashboard, List, Types, Qualifications, Time Commitments, Application Forms (highlighted), Roles, Volunteer Admins, Settings, and Reports. The main content area displays a table of application forms:

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:

The screenshot shows the Higher Logic interface for email templates. The sidebar on the left includes: Email, Discussions, Email Management, Email Templates (highlighted), Delivery Management, Delivery Notification, Sent History, and Reports. The main content area shows a form for creating a template with the following fields:

- Category: Volunteer
- Community: [dropdown]
- Opt-Out Group: [dropdown]
- Active: On, Inactive: Off, System: Off, Non-System: Off

Below the form is a table of existing templates:

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

Volunteer Opportunities - Admin

▲ Hide Filter

Time Commitment: Nothing selected ▾	Types of Opportunities Nothing selected ▾	Qualifications: Nothing selected ▾
Communities Nothing selected ▾	Opportunity Status 1 item selected ▾	Opportunity Name 1 item selected ▾

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	<div style="border: 1px solid #ccc; padding: 2px;">Do not send ▾</div> <p><small>Note: Message sent to volunteers invited to apply for the opportunity.</small></p>
Nomination	<div style="border: 1px solid #ccc; padding: 2px;">Do not send ▾</div> <p><small>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.</small></p>
Acknowledgement	<div style="border: 1px solid #ccc; padding: 2px;">Acknowledgement email (global) ▾</div> <p><small>Note: Message sent to those who have signed up for the auto-approve opportunity.</small></p>

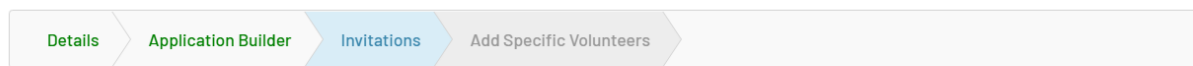
5. Click "next step: application builder"

- 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



Preselected Volunteers 0 volunteer(s) matched this opportunity's requirements

Adjust requirements Tighter Loosen

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

Invitation to volunteer 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