Volunteer Management Module

Last Modified on 10/26/2026 3:23 pm EDT

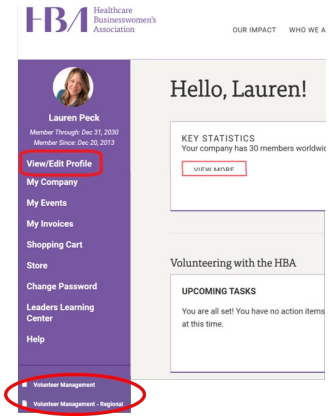
As we continue building and rolling out HBA's **future-state Volunteer Management System**, we're excited to introduce an **interim volunteer management solution** designed to give our **leaders greater ownership and control** over key volunteer actions, right now. This article reviews the THREE SECTIONS of the new volunteer management module, how to use it, and much more.

This interim solution allows authorized leaders to:

- Request new volunteer roles to be opened
- Manage active volunteer terms (end or extend)
- Correct or reinstate **past volunteer terms**
- Ensure volunteer access and permissions stay accurate and up to date

While this is a temporary solution, it reflects our long-term direction: putting volunteer management power in the hands of volunteer leaders, with the right structure and safeguards in place.

What's coming next?
Our full volunteer management solution (currently in development) will provide to engagement leaders end-to-end control over volunteer roles, applications, approvals, onboarding, terms, access, and reporting. The HBA aims to launch this solution by end Q2/early Q3 2026.



Volunteer Management Access

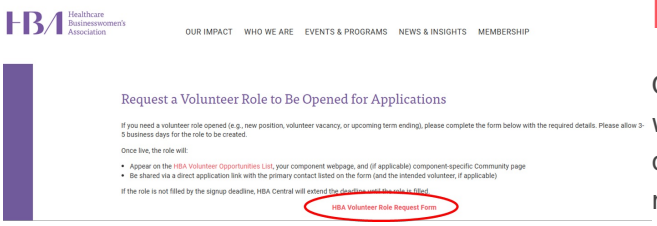
Accessible by: Executive Committee (EC) leaders and Engagement (Membership/Volunteer) leaders at the location and regional levels

Where to find it: in your HBA profile (see image left), in the left-hand purple sidebar.

1. First, **be sure to click "View/Edit Profile".**
2. Then navigate to **Volunteer Management or Volunteer Management - Regional** at the bottom of the purple sidebar. Each version displays only the volunteers and roles tied to your component.

Section 1: Requesting a Volunteer Role to Be Opened

Use this section when you need a volunteer role opened for applications, including: a **new role, a vacancy, or an upcoming leadership transition.**



How It Works

Complete the **Volunteer Role Request Form** with all required details. Please allow 5 business days for HBA Central to process and open the role. This new process will funnel all inquiries into one place, in a consistent format, allowing HBA Central to triage for you more quickly.

What Happens Once the Role Is Live

Once approved and created, the role will:

- Appear on the HBA Volunteer Opportunities List
- Display on your component webpage
- Appear on the component-specific Community page (if applicable)
- Be shared via a **direct application link** with:
  - The primary contact listed on the form
  - The intended volunteer (if applicable)

If a role is not filled by the signup deadline, HBA Central will automatically extend the deadline until the role is filled.

> **Important:** Volunteers moving into a *new role* must always apply and be approved through the Volunteer Opportunities List, even if they previously served in another role.

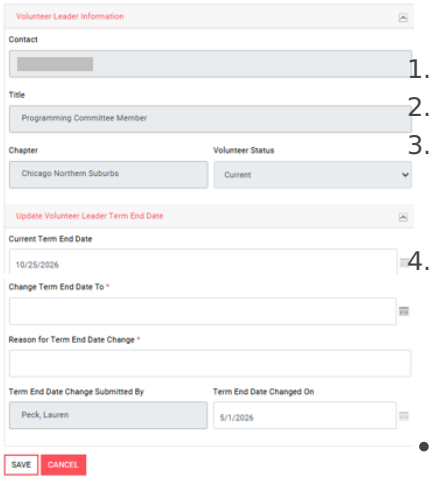
Section 2: Current Leadership Roster (for active volunteers)

This section displays **all volunteers currently serving in a role** for your component (i.e. their term is active).

What You Can Do Here

- **Export the roster** using **Export All to Excel**
- **End a volunteer's term** (if they've moved out of a role for any reason)
- **Extend a volunteer's term** (if they've re-upped for an additional two-year term - see **term extension details** below)

Adjusting an individuals Term End Date will update their official volunteer record in the HBA's database and automatically adjust access and permissions tied to that role (like reports, SharePoint access, etc)



How to End or Extend a Term

1. Locate the volunteer whose term is to be ended/extended
2. Click the **red pencil icon**
3. Update the **Term End Date** appropriately and provide a brief reason for the edit (i.e. volunteer term ended due to personal obligations, etc)
4. Click **Save**

Term Extension Rules (Please Read Carefully)

- Extended terms **must end on the last day of a calendar year**
  (Example: 31 December 2027)
- Volunteers may serve **no more than two consecutive two-year terms**
  (4 years total in the same role)

If Someone Is Missing From This List

It usually means one of two things:

- HBA has no record of their service, and they must apply and be approved
- Their term has already ended. See the Past Leadership Roster below

Section 3: Past Leadership Roster

This section lists all volunteers whose terms have already ended.

When to Use This Section

Use this section **only if a term ended in error** or needs to be reinstated.

How to Reinstate a Volunteer

1. Locate the volunteer
2. Click the **red pencil icon**
3. Edit the **Term End Date** to a future date *(Must be the last day of a calendar year - e.g., 31 December 2027)*
4. Click **Save**
5. Once updated:

- The volunteer will move back to the Current Leadership Roster
- Their role access and permissions will be fully reinstated

Critical Reminder: All volunteers must be current HBA members.

Before extending or reinstating a term:

- Confirm the volunteer's **HBA membership is active**
- **Do not extend terms** for non-current members

If you notice a volunteer's membership has expired, please **reach out directly** and ask them to renew before proceeding.

If you have any issues navigating this Volunteer Management Module, or if these instructions are unclear, please email volunteer@hbanet.org.
