WE DISCOVER, WE GROW
Girlguiding

Managing Volunteers

This help file contains the instructions you need to manage volunteer roles in your area.

For information about adding qualifications, modules and courses please see the relevant help files from the help zone on GO.

1. Contacting a New Volunteer

1) The level's main contact, has received an automated notification email about an enquiry for your District/Division.

2) Click on the 'Commissioner/Level Support' button at the top of the screen and then on 'My District Roles/My Division Roles/My County Roles' from the drop down.

3) Click on the relevant level from the list of levels on the screen; click on the 'Volunteer Enquiries' tab across the top of the screen.

The number signifies how many enquiries you have awaiting action (possible actions listed below).

4) You can now see a list of all enquiries for your level. To find those who have not yet been contacted, select 'New Enquiries' from the left hand menu. The left hand menu gives you have the following options:

All Volunteer Enquiries	This shows all enquiries for your level, members transferring and volunteers brand new to guiding.
New Enquiries	This shows enquiries that require action.
Volunteer Enquiries Contacted	This shows all enquiries that you have contacted but have not either added to a waiting list, arranged their first unit meeting or added to the active list.
Meetings Arranged	This shows all enquiries for which you have arranged their first unit meeting.
Volunteer Enquiry Individual	This shows the enquirers and is where you can edit their details as required.
Awaiting Recruitment Checks	This shows all enquiries who are currently awaiting recruitment checks.

The column headings in blue can be sorted by clicking on the heading. The key columns are 'Status Reason' and 'Level'.

5) To find the contact information click on the name of the volunteer and this will display a pop-up with the details.

6) Once contact has been made click on the actions arrow and select the relevant option.

Action	Description
Decided Not to Join	They no longer wish to join Girlguiding, enquiry removed from GO
Mark as Contacted	Show that you have made contact with the enquirer
Arrange a meeting	Arrange a meeting with the volunteer
Confirm Role	Confirm that they have joined Girlguiding
Refer to Another Unit	Refer the enquirer to a more appropriate area
View Skills	Shows the skill information about the enquirer
View Volunteer	Shows the personal information about the enquirer

2. A new volunteer has joined Girlguiding

1) Click on the 'Commissioner/Level Support' button at the top of the screen and then on 'My District Roles/My Division Roles/My County Roles' from the drop down. Click on the relevant level from the list of levels on the screen; click on the 'Volunteer Enquiries' tab across the top of the screen.

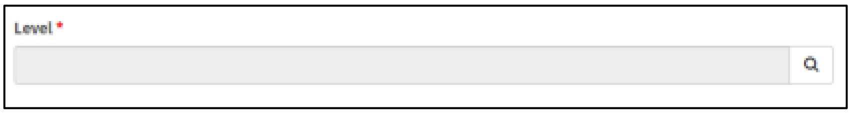
2) Select the relevant enquiry box for where they are currently recorded.

New Enquiries	This shows enquiries that require action.
Volunteer Enquiries Contacted	This shows all enquiries that you have contacted but have not either added to a waiting list, arranged their first unit meeting or added to the active list.
Meetings Arranged	This shows all enquiries for which you have arranged their first unit meeting.

The column headings in blue can be sorted by clicking on the heading. The key columns are 'Status Reason' and 'Level'.

3) Click on the actions arrow and select the 'Confirm Role' option.

4) On the pop up use the magnifying glass to select the level that the volunteer will be working at and click 'Select'.



5) Click the check box 'Confirm level or use current level?'. You will now have the 'Role Type' magnifying glass, click on this and select the role that the volunteer will hold. Click 'Select' to choose.

NB// You must click the check box as this ensures the roles offered are relevant to the level type.

6) Amend the alternative title (if appropriate) and start date as required.

7) Click 'Submit' to save.

If the volunteer is younger than 18 they will now be showing as an active volunteer within the relevant level's volunteer information.

3. Adding reference details to a new volunteer

References are only collected for volunteers over the age of 18. For volunteers under 18, when their role has been confirmed they will automatically show as an active member.

If the volunteer is 18 or older they now need to complete the relevant disclosure checks including two references:

1) Click on the 'Commissioner/Level Support' button at the top of the screen and then on 'My District Roles/My Division Roles/My County Roles' from the drop down. Click on the relevant level from the list of levels on the screen; click on the 'Volunteer Enquiries' tab across the top of the screen.

2) Click on 'Awaiting Recruitment Checks' from the left-hand menu.

3) Click on the actions arrow beside the volunteer and select the 'View Contact/Add Referees' option.

4) On the pop-up use the 'Add New Referee' button to add the details of the individual's first referee.

5) Use the 'Add New Referee' button to add the details of the individual's second referee. Close the pop up and return to the list of volunteers awaiting recruitment checks.

If a disclosure check is required, the volunteer will remain in 'awaiting recruitment checks' but will also show on the disclosures list as 'new'. See instructions for the disclosure process in part 6 of this help document.

4. Adding a unit role to an existing volunteer

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen.

2) Scroll down on the District Details page until you get to the ‘Units’ table. Find the unit the volunteer is joining and click on the unit’s name.

3) Click on the ‘Volunteer Roles’ tab along the top of the screen. Click on the ‘Add Existing Volunteer’ button.

4) Enter the volunteer’s membership number. If you don’t have their membership number, you can search with name and date of birth.

5) Click search.

6) Click on the actions arrow against their name.

7) Select ‘Transfer In’.

8) On the newly appeared fields:

- Use the magnifying glass to select the role from a table
- Enter an alternate title if required
- Choose the start date for the role (you can select a date up to one month in the future).

NB// If a date in the future is selected the role will be active-pending until this date has been reached. If when the date has been reached there is an outstanding disclosure check or they do not have the required qualifications for the role they will remain as active pending.

e.g. If you add a volunteer as a Leader but they do not have a completed Leadership Qualification their role will remain as active pending until this has been completed and is showing on their record.

9) Click submit to add the role to the individual; you’ll get an on-screen confirmation message.

5. Adding a district/division/county role to an existing volunteer

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen.

2) Scroll down on the District Details page until you get to the ‘all levels’ table. Find the level at which the volunteer is joining and click on the area’s name.

3) Click on the ‘Volunteer Roles’ tab along the top of the screen. Click on the ‘Add Existing Volunteer’ button.

4) Enter the volunteer’s membership number. If you don’t have their membership number, you can search with name and date of birth.

5) Click search.

6) Click on the actions arrow against their name.

7) Select ‘Transfer In’.

8) On the newly appeared fields:

- Use the magnifying glass to select the role from a table
- Enter an alternate title if required
- Choose the start date for the role (you can select a date up to one month in the future).

NB// If a date in the future is selected the role will be active-pending until this date has been reached. If when the date has been reached there is an outstanding disclosure check or they do not have the required qualifications for the role they will remain as active pending.

9) Click submit to add the role to the individual; you’ll get an on-screen confirmation message.

6. Adding an ID Verifier to a disclosure applicant

These instructions should be used by Commissioners, Administrators and ID Verifiers to manage the disclosure process for volunteers in their area.

Finding out who needs to complete a check – For Commissioners and Administrators

It is the responsibility of the Commissioner to ensure that volunteers in their area have the correct disclosure checks completed. To find a list of volunteers who require a check:

1) Click on ‘Commissioner’ or ‘Level Support’
2) Click on ‘My District Roles’, ‘My Division Roles’ or ‘My County Roles’
3) Click on the level name
4) You’ve landed on the level’s details page, click on the ‘Disclosures’ tab
5) This page automatically shows you a list of all those who need a disclosure check started. Their disclosure status will show as ‘New’
6) You can change the view to show those that are currently ’In progress’ with their disclosure application if required.

Note/ Those that are within four-month of their existing disclosure check expiring (DBS and Access NI) will show in the ‘New’ disclosures list. When it is in progress, they will move to the ‘In progress’ list.

Assigning an ID Verifier to an applicant – For Commissioners and Administrators

So that the ID Verifier can contact the applicant and arrange the check, you will need to assign them to the applicant’s record on GO. To complete this:

1) From the ‘New’ list you have on screen (instructions above)
2) Click on the actions arrow and select ‘View Disclosure’
3) In the pop up, use the ‘ID Verifier Selector’ field and click on the magnifying glass.
4) Choose the relevant ID Verifier from the list, then click select and this takes you back to the pop-up with the name now in the selector field.
5) Click on the blue ‘Update’ button to save the change.

Note/ You can only choose ID Verifiers that have a role in your level or below. If you would like to choose an ID Verifier from a higher level, then you will need to ask someone at County level to make the connection on GO.

7. Ending a volunteer's role

1) Click on the 'Commissioner/Level Support' button at the top of the screen and then on 'My District Roles/My Division Roles/My County Roles' from the drop down. Click on the relevant level from the list of levels on the screen. ***If the volunteer is a member and not on your enquiry list skip to step five***.

2) Click on the 'Volunteer Enquiries' tab across the top of the screen.

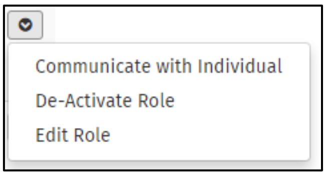
3) Select 'All Volunteer Enquiries' from the left-hand menu.

4) Click on the actions arrow for the enquirer and select 'Decided not to join'. On the pop-up select why they have decided not to join Girlguiding and 'Submit' to save. This will then remove the enquiry from GO and they'll need to register again if they change their mind.

5) If the volunteer is a member and not on your enquiries list; Click on the 'Commissioner Management' tab at the top of the page; then 'Volunteer Roles' from the left-hand menu. Click on the actions arrow for the relevant volunteer role.

6) Click on the 'De-activate role' option, a pop-up will appear.

7) Insert the volunteer's end date and update to save the information.



If this is the volunteer's only role in guiding it will mean they have left Girlguiding. If this role was their main role the next oldest role will automatically become their main role.

8. Editing the contact information for a volunteer

For enquirers:

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen; click on the ‘Volunteer Enquiries’ tab across the top of the screen.

2) Select the actions arrow for the volunteer from the All Enquiries list

3) Select ‘Edit Individual’ option from the list.

4) Make the changes on screen and click to update the details.

For existing volunteers:

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen; click on the ‘Volunteer Enquiries’ tab across the top of the screen.

2) Select the actions arrow for the volunteer from the list of all volunteers

3) Select ‘Edit Contact’ option from the list.

4) Make the changes on screen and click to submit the details.

Note// If the volunteer does not have emergency contact information on their record you will not be able to amend their contact information. These are mandatory fields to ensure someone can be contact in the event of an emergency.

If the volunteer has already set up their username to log in to GO and they’d like to change their email address, they will need to log in and amend this themselves.

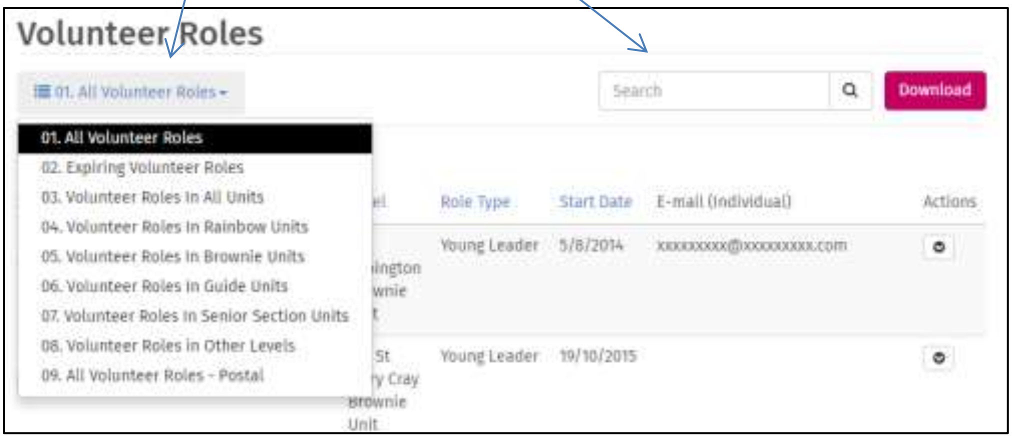
9. Contacting volunteers within your area

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen.

2) Click on the ‘Commissioner Management’ tab across the top of the screen.

3) Select the ‘Volunteer Roles’ option from the left-hand menu.

4) Use the various views and search bar to find the group of volunteers you require.



5) Once you have your list, click on the ‘download’ button and copy the email addresses into the BCC field of your email.

NOTE//

To get in touch with the main contact for each level in your area (District/Division/County) click on ‘District/Division/County Details’ and scroll to the table called ‘All Levels’ use the download button to get their email addresses.

Once you have sent the email, please delete the spreadsheet you have downloaded to ensure compliance with the data protection act 2018.

10. The becoming an adult process

1) Click on the ‘Commissioner/Level Support’ button at the top of the screen and then on ‘My District Roles/My Division Roles/My County Roles’ from the drop down. Click on the relevant level from the list of levels on the screen.

2) Click on the ‘Commissioner Management’ tab across the top of the screen.

3) Select the ‘Becoming an adult’ option from the left-hand menu.

4) On the screen you will now be seeing a list of members in the area who are going to turn 18 in the next year or who have already turned 18.

To prepare for the volunteer turning 18 you will need to discuss the role options available to them and if they will need to complete a disclosure check for the role.

Once you have had the conversation and updated the volunteer’s role accordingly mark the 18-year review as complete.

5) Click on the actions arrow for the volunteer and select ‘mark 18YO review complete’.