



Volunteer Tracking Overview

Purpose: Provide very basic instructions for volunteers to accurately enter, update and manage records which track volunteers.

Overview

This set of instructions builds upon information included in an earlier tip sheet for Manual Membership Data Entry.

For organizations not using the Land Tracker module, all volunteer information is entered at the Contact record within the Contact detail section. These items that can be further customized by your Salesforce administrator identify volunteer roles for ease of communications. It is possible that volunteer projects could be entered as Events, but this is not ideal, especially if there are many volunteer projects.

For organizations using the Land Tracker module, volunteer tracking can include property specific stewardship roles and projects that will also appear in the volunteer's Contact record when it is called up in the 'Membership Donation Management' mode.

Entering Volunteer Contact Detail

1. Follow the 'First Steps' in the Manual Membership Data Entry instructions.
2. Search for the Contact record as described in Tipsheets 1 & 2. Enter the Contact record. Click on the Edit button if not already in the edit screen.
 - a. **Note:** If the Contact is not in the database, create a New Contact by following the directions in Tipsheet 1.
 - b. **Note:** If a Household Account exists, but the Contact is not included, add the new Contact only from within the Household Account using the 'New Contact' button. This situation often occurs when teenagers volunteer and their parents are already included in the database.
3. In the Contact Detail section of the Contact record 'Volunteer Information' is located just below the Address Information Section. All of the steps that follow will take place within the purple coded Contact fields.





Contact Detail

Contact Details

Name	Love DeTest
Account Record Type	Household
Account Name	<u>DeTest, Love Household</u>
Title	
Description	

Contact Information

Preferred Phone	
Home Phone	
Mobile Phone	
Work Phone	
Other Phone	
Fax	

Address Information

Primary Address Type	
Primary Address	15 Little Rd. Home, RI 02709
Do Not Mail	<input type="checkbox"/>

Volunteer Information

Volunteer Skill Set	
Group Affiliation	
Board Member Role	
Active Board Member	<input type="checkbox"/>
Volunteer Description	

- Note:** Avoid using the ‘Description’ field under “Mailing and Contact Information” to include volunteer information since this field cannot be sorted for Views or Reports. If you can’t find a place for key volunteer information within the “Volunteer Information” section, consult your volunteer advisor.
- Take this opportunity to double check, complete or update other areas of the Contact Detail record for accuracy.**
- ‘Volunteer Skill Set’** includes a long list of skills and roles that can be moved from ‘Available’ to ‘Selected’. The illustration below shows some of these fields, including some custom options. Your organization may use some of the more typical options, omit some of the custom skills shown here and include its own unique skills. Check with your volunteer advisor to be sure you understand the meaning of each role. Skills can be moved back and forth as the volunteer’s interest selections change.

Volunteer Information

Volunteer Skill Set

Available	Selected
Fundraising	Grant writing
Mailing	Outings Leader
Newsletter Editor	Trail Projects

- ‘Group Affiliation’** includes the current bodies in your nonprofit on which this volunteer serves. Check with your volunteer advisor to determine whether this area is used to indicate current service only (most common) or if it is used to include past service. This area must get updated frequently to remain accurate for current service. This example





includes committees and the board of one non-profit. Your organization's options may be different. Check with your volunteer advisor to be sure you understand the options.

- e. **'Board Member Role'** is typically used for current Board members to indicate service as an Officer, or if not, on the general Board. Unless someone currently serves on the Board this pick list is left at the default option, 'None'. It is possible that your non-profit has added additional Board roles to this pick list.

- f. **'Active Board Member'** is a box that can be checked to indicate current Board service. This is especially used if Group Affiliation above or Board Member Role is used to include past committee and Board service.

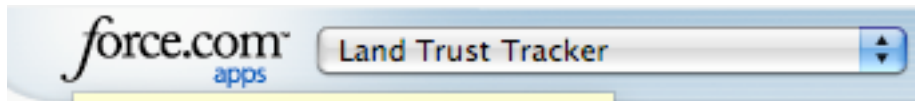
- g. **'Volunteer Description'** this is an open-ended field to include additional volunteer information. Be aware that contents within this field cannot be sorted for Views or Reports. If you can't find a place for key volunteer information within the "Volunteer Information" section, consult your volunteer advisor. It is helpful to standardize organization use of this field as much as possible including any lead phrases, as this field will sort based on the first letter of the first word in the Volunteer Description.
- h. Click either 'Save' button to record the edited information. You will be returned to the Contact record screen for this Contact.





Volunteer 'Land Tracker' Project and Volunteer Entry

4. Follow the 'First Steps' in the Manual Membership Data Entry instructions.
5. Go to the upper right-hand corner of the screen and use the arrows to switch from the 'Membership Donation Management' view to the 'Land Trust Tracker' view.



6. In Land Trust Tracker, an application developed by Idealist Consulting. Note that the Home page is a bright green and the tabs have changed names and order. The underlying database includes all information; the alternate format is simply for ease of presentation and use. The Home page Dashboard includes several standard graphs that can be changed or customized to your organization if desired.

Land Trust Tracker for **Apexchange**
By Idealist Consulting

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Search
[Search Box] [Go!](#)
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Create New Contact and Account

- For Households
- For Organizations

Recent Items

- [Itsa Test](#)
- [River Test Friends](#)
- [Test, Itsa Household Membership - 3/20/2009](#)
- [Test, Itsa Household](#)
- [Test, Itsa Household- Donation 3/20/2009](#)
- [Ima Tester](#)
- [McTester, Tester Household](#)
- [Tester, Ima Household](#)

Recycle Bin

Helen Tjader at Friends of Moshassuck
Monday April 13, 2009

Dashboard [Refresh](#)

As of 2/18/2009 1:01 PM

Property Project Report by Stage

Record Count

Project Stage

Conservation Easement Monitoring

Monitoring Status

No Data

Property Resource Type

Resource Types

Record Count

My Tasks [New](#)

You have no open tasks scheduled for this period.

Calendar [New Event](#)

Today 4/13/2009

You have no events scheduled for the next 7 days.

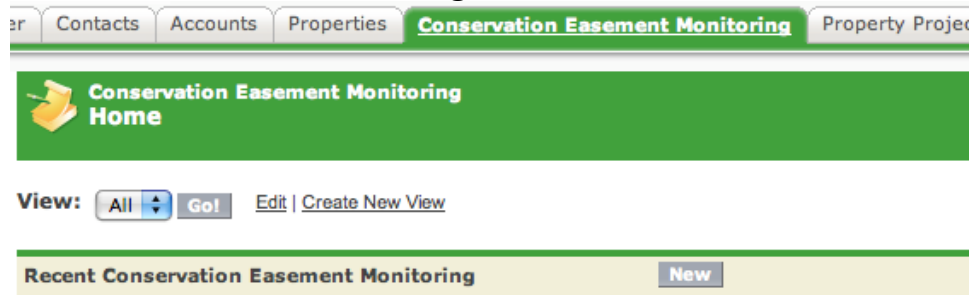




7. **Organizations other than land trusts can make use of this app if they hold location based service projects. It may be helpful to track these service projects by location rather than record them with fundraising types of events. It can be helpful for sorting your Contacts for project service awards or for listing out your projects for grant applications using the fields provided by Land Tracker.**
8. Before Projects or Project Volunteers can be recorded, properties need to be entered into you organization's database. Just as with other types of entries, it is important that the property names be standardized. It may be helpful to enter additional fields for properties to indicate a property number, especially if properties do not have unique names. Also, properties that are monitored together can have an additional field to indicate they are part of a property group. Check with your organization's admin. This tip sheet does not explain general property entry. The lower section of the Property Detail screen includes several areas that can include volunteer information.
9. **"Property Contact" roles:**



10. **"Conservation Easement Monitoring" links:**



11. **"Property Projects" roles:**



12. The first place to begin enter a property's volunteers and other contact relationships is through the **"Property Contact"** role. Click on the **'Properties'** tab. The default Properties Home page lists Recent Properties as shown below. You can also locate the correct property by name via a View or through a Search. The Property record icon is a leaf and the color for this tab is a leaf green.





er Contacts Accounts **Properties** Conservation Easement Monitoring

Properties Accounts Tab
Home

View: Properties: All Go! Edit | Create New View

Recent Properties			New
Property Record Name	City	State	
Test Wetlands		RI	

13. For Test Wetlands, click on the name to enter the Property Detail Screen. Confirm that you have selected the correct property.

Property Detail Edit Delete Clone

Property Record Name Test Wetlands

Property Record Number Property # 2009 - 0001

Property Batch Number

Property Project Association

Aquisition Type Donation

Tax Parcel

Assessed Value

Appraised Value

Ownership Type Fee Simple Acquisition

Property for Sale ☐

Miles of trails 3

Lot Number

Plat Number

Property Location

Address

City

State RI

Zip Code

GPS Coordinates

Directions to Property

Property Description

Conservation Value Rare vernal pool species

General Property Description Red maple swamp with vernal pools

Legal Land Description

Contamination Description

Property Specifics

Number of Acres 15.00

Zoning Type Conservation

Resource Types Forest; Historic; Rare Species; Wetlands: Fresh Water

Contaminated ☐

Custom Links [Property Map](#)

Edit Delete Clone

Property Contacts New Contact Property Association

No records to display

14. Click on the 'New Contact Property Association' button in the 'Property Contacts' section to view the edit screen.





15. Use the lookup feature to locate and link the correct Contact. Choose the appropriate role from the '**Property Role**' pick list. Your organization may have customized this list to include additional roles such as 'Monitoring Steward'. In this case, Itsa is a general 'Volunteer'.

16. In this instance, an additional, optional '**Other Description**' has been added to indicate that Itsa likes to work on Invasive Plants and Trail Work. Just as in the Volunteer Description section in the Contact record, these descriptions are most useful if they are standardized. The description will sort in reports based on the first letter of the description.
17. Here is the saved 'Contact Property Association Detail' record. It is automatically assigned a record number including the year and the sequential number of the association entries for your organization.





Contact Property Association
CA#-2009-0000

« Back to List: Campaigns or Events

Contact Property Association Detail [Edit](#) [Delete](#)

Contact/Property Assoc. Record Number	CA#-2009-0000
Property	Test Wetlands
Contact	Itsa Test
Property Role	Volunteer
Other Description	Invasive plants, trail work

[Edit](#) [Delete](#)

18. On the Test Wetlands property record, Itsa has been added to the Property Contacts section.

Property Contacts				
New Contact Property Association				
Action	Contact/Property Assoc. Record Number	Contact	Property Role	Other Description
Edit Del	CA#-2009-0000	Itsa Test	Volunteer	Invasive plants, trail work

19. And on Itsa's Contact record, his property roles are also shown.

Contact Property Association			
New Contact Property Association			
Action	Contact/Property Assoc. Record Number	Property	Property Role
Edit Del	CA#-2009-0000	Test Wetlands	Volunteer

20. At the Kelly green 'Conservation Easement Monitoring' tab, additional volunteer information can be entered for monitoring status and reporting at a property. In this example, Itsa's wife Ima is the 'Easement Monitor' and has noted trail maintenance issues in her monitoring report. Look up features ease data entry.

Contacts Accounts Properties **Conservation Easement Monitoring** Property Projects Reports Documents Dashboards R

Conservation Easement Monitoring Edit
New Conservation Easement Monitoring

[Save](#) [Save & New](#) [Cancel](#)

Information

Monitoring Date: 4/14/2009 [4/14/2009]
Monitoring Status: Monitoring Completed
Land Issues: Signage, Tree Hazard, Other. Selected: Trail Maintenance

Stewardship Concern

Stewardship Concern: Additional trail work is needed to remove overgrowth along trails.

Key Aspects of Easement Monitoring

Key Aspects of Easement Monitoring: Trail maintenance

Easement Monitoring Roles

Property Association: Test Wetlands
Conservation Easement Holder:
Easement Monitor: Ima Tester

[Save](#) [Save & New](#) [Cancel](#)

21.





22. Once this record is saved, notes or other records or a copy of the monitoring report can be attached. Note: Salesforce has the capacity for storing electronic documents, but the memory required for photos may exceed the available storage especially for the quantity of permanent photo storage required for ongoing monitoring records.
23. The Property Detail Record now includes a monitoring record.

Conservation Easement Monitoring		New Conservation Easement Monitoring		Conservation Easement Monitoring	
Action	Conservation Easement Record Number	Conservation Easement Holder	Easement Monitor	Monitoring Date	Monitoring Status
Edit Del	CEM-2009040000		Ima Tester	4/14/2009	Monitoring Completed

24. And Ima's Contact record also shows her monitoring work.

Conservation Easement Monitoring		New Conservation Easement Monitoring		Conservation Easement Monitoring	
Action	Conservation Easement Record Number	Conservation Easement Holder	Property Association	Monitoring Date	Monitoring Status
Edit Del	CEM-2009040000		Test Wetlands	4/14/2009	Monitoring Completed

25. Ima's role should also be noted within the Volunteer Skill Set of her Contact record; this organization could customize their pick list to include 'Monitoring Steward'. The organization might also want to add fields or description notes to indicate when she started volunteering in this role so that her service can be tracked for volunteer recognition. There is great flexibility here, but it is important to standardize entries and only add fields that will be actively used and accurately updated.
26. The stewardship chair, office manager or someone else in the organization can then send an email to Ima to let him know trail work is needed from within his Contact record. Salesforce can be synched with email accounts for a license holder so that it becomes easy to track messages to and from Contacts.

Activity History		Log A Call	Mail Merge	Send An Email	Request Update	View HTML Email Status
No records to display						

27. Also, the stewardship chair or manager can create tasks for himself or other license holders to track the follow up of property issues on his Home page.
28. Another area to input volunteer activity is via the blue Property Project tab. Here is an example of a 'Property Project' for the trail work as entered on the edit screen. The project name was chosen to include the property name, brief description, year and number. These naming components can be helpful in distinguishing similar projects when many projects are underway simultaneously or over time. Follow whatever naming system your organization chooses. In this case the project was considered 'Active' on the pick list of options. The description notes the purpose and estimated time of the project for participants and managers. The description can be edited when the actual time recorded. Including the time can be helpful for grant reporting or management purposes. Salesforce does not tally volunteer time, so it is helpful to include it here.





29. The Property record can then be edited to link it to this project. The current Land Tracker app allows one Property Project Association per property; some organizations have adapted the app to allow multiple project associations per property and created a section within the Property screen to display all the related projects.

30. Click on the link to return Property Project screen. Volunteers for the project can be added to the project. Right now, the only volunteer is the Project Manager, Itsa. By clicking on the 'New Contact Project Association' button, he is linked to the project.





31. The lookup buttons simplify linking to the Contact records. Because this edit was done via the Property Project screen within the Property record, the Property Project name was automatically supplied. The pick list of Project Roles shown below can be adapted by your organization.

32. The saved Contact Project Association Detail record is shown below:

33. The saved record will now be listed on the Property Project screen for Test Wetlands.

Contact Project Associations		New Contact Project Association	
Action	Contact Project Association Name	Contact	Project Role
Edit Del	CP2009-0000	Itsa Test	Project Manager

34. And it will appear within Itsa's Contact record in a newly displayed section for his Contact Property Associations.

Contact Project Associations		New Contact Project Association		Contact Pr
Action	Contact Project Association Name	Property Project	Project Role	
Edit Del	CP2009-0000	Test Wetlands Trail Work 2009-1	Project Manager	

35. When the project is completed, all the volunteers who helped can be linked to the Property Project. An attendance list can be scanned and attached to the Property Project file. For many organizations this type of recordkeeping is required for insurance purposes as well as volunteer recognition. Reports can be prepared showing participation across many projects and properties. Views can also be created to give quick reference snapshots of project and volunteer information.



