



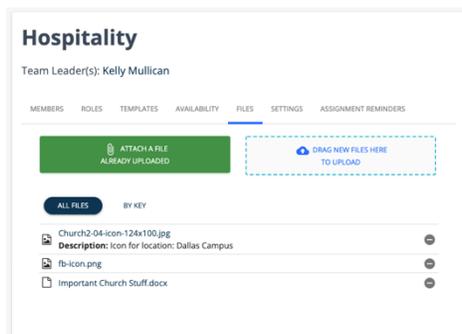
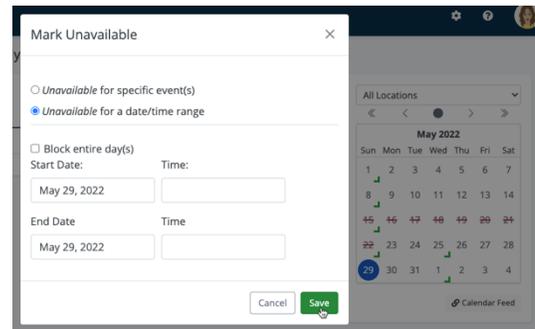
Level Up Your Volunteer Scheduling with WorshipPlanning

Session Handout

WORSHIP PLANNING TIPS AND TRICKS

USE THE CALENDAR TO MARK AVAILABILITY

Encourage your volunteers to use the calendar to mark dates they will be unavailable to serve. This will help you as the planner not have to go find substitutes as often or at the last minute.

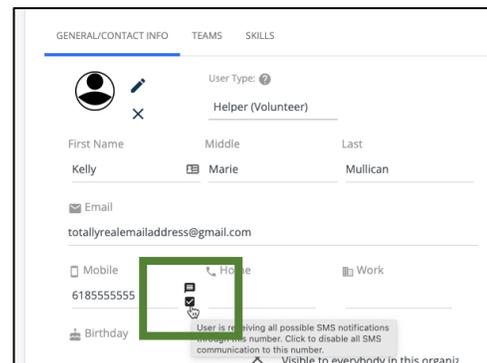


WORSHIPPLANNING OFFERS UNLIMITED FILE STORAGE

You can even attach files to you teams, making it easy to find documents, images, videos, and more related to that particular team or ministry.

ENABLE TEXT NOTIFICATIONS

If a valid phone number is listed for a WorshipPlanning user, check the Texting box next to their mobile phone number to enable texting notifications from WorshipPlanning.



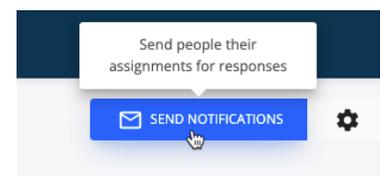
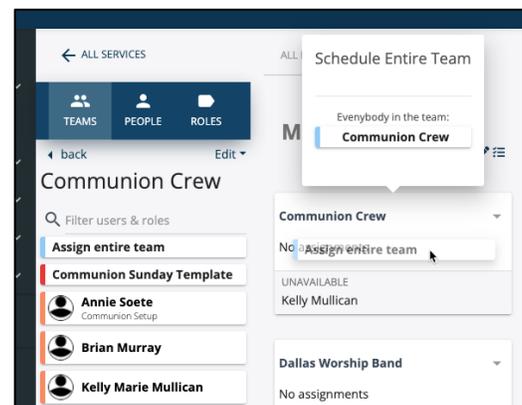
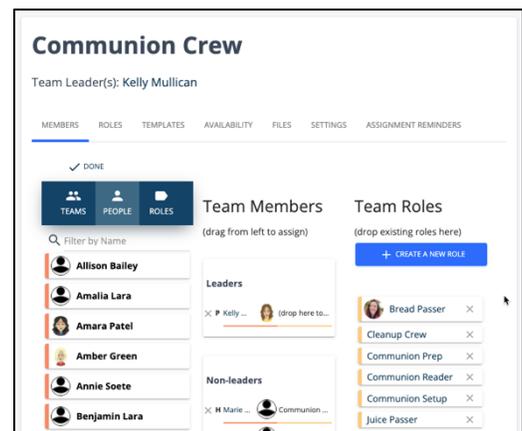
[VOLUNTEER POV VIDEO](#) – Use this to help your congregants understand how to use WorshipPlanning!

BASIC STEPS OF SCHEDULING VOLUNTEERS:

1. Add people to your WorshipPlanning database.
2. Create a team for your volunteers.
3. Create an event where the volunteers will serve.
4. Schedule your volunteer team (remember, all volunteers must have a scheduled role!)
5. Send scheduling notifications.

SCHEDULE A SPECIFIC TEAM

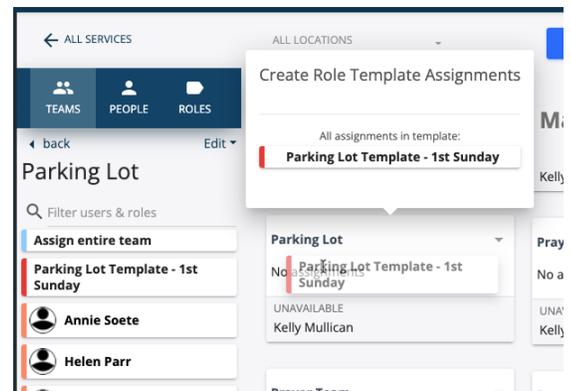
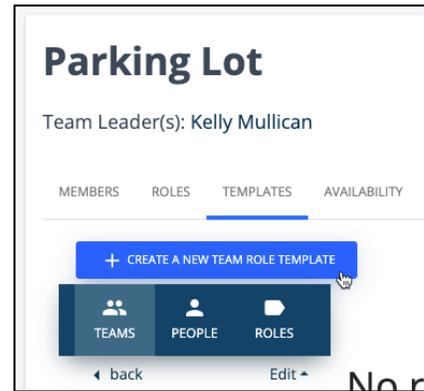
1. Create a new team from the People tab, or edit an existing team.
2. Make sure that your team has a team leader (must be someone with a Planner account) and add your volunteers to the non-leaders area.
3. Create or add any relevant roles to this team.
4. Assign specific roles to volunteers if you would like them to be auto-assigned that role when you schedule them for that team (optional).
5. Create an event for the date/time you need the volunteers for, if one does not already exist.
6. From the Schedules tab, scroll until you find the date and time that you need to schedule the volunteer team for.
7. With the Teams tab selected, click on the name of your volunteer team and then drag and drop in team members or you can assign the entire team.
8. Be sure everyone scheduled on the team has a role assigned to them for that team.
9. When all people and roles have been added for the team, click the Send Notifications button to notify the individuals that they have been scheduled to serve.



CREATE A TEAM TEMPLATE

GREAT FOR SMALL, SPECIFIC TEAMS THAT ALWAYS GET SCHEDULED TOGETHER

1. Create a new team from the People tab, or edit an existing team.
2. While on the team's page, click the Templates tab, then click Create a New Team Role Template.
3. Name your team template and give a description if necessary, then click Create.
4. Drag and drop people and roles assigned to those people into the newly created team template.
5. Create an event for the date/time you need the volunteers for, if one does not already exist.
6. From the Schedules tab, scroll until you find the date and time that you need to schedule the volunteer team for.
7. With the Teams tab selected, click on the name of your volunteer team, select the team template (displays with a red side tab), and drag and drop into the appropriate team assignment card.
8. When finished, click the Send Notifications button to notify the individuals that they have been scheduled to serve.

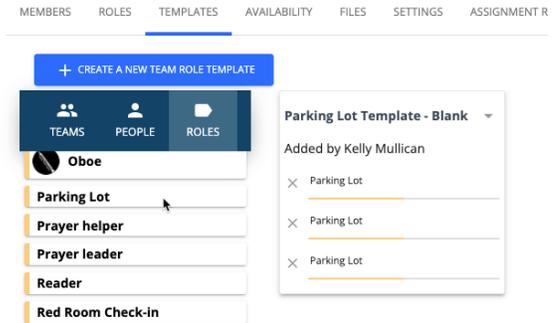


CREATE A BLANK TEAM TEMPLATE

GREAT FOR STATIC VOLUNTEER POSITIONS WHERE VOLUNTEERS CAN BE ADDED LATER

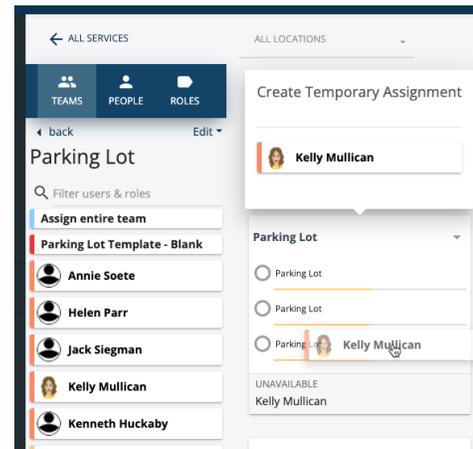
1. Create a new team from the People tab, or edit an existing team.

2. While on the team's page, click the Templates tab, then click Create a New Team Role Template.
3. Name your team template and give a description if necessary, then click Create.



4. Drag and drop ONLY roles into the newly created team template. Keep in mind to only add as many roles as will be needed for that particular ministry for that specific date and time.
5. Create an event for the date/time you need the volunteers for, if one does not already exist.

6. From the Schedules tab, scroll until you find the date and time that you need to schedule the volunteer team for.
7. With the Teams tab selected, click on the name of your volunteer team, select the team template (displays with a red side tab), and drag and drop into the appropriate team assignment card.



8. Drag and drop people from the team's list onto each empty role.
9. When finished, click the Send Notifications button to notify the individuals that they have been scheduled to serve.

NOTE ABOUT USING TEAM TEMPLATES:

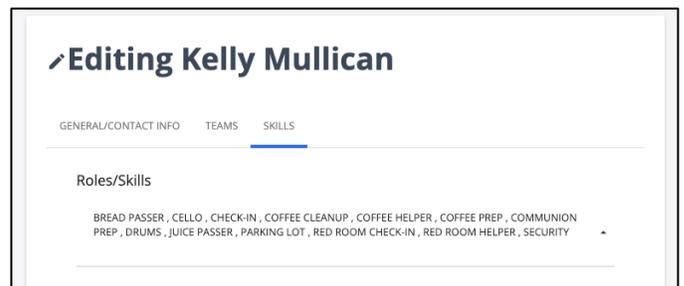
Use when creating new events, you can add Team Role Templates which will automatically place that team's template onto the volunteer schedule for the event's date and time.

Note: you will still need to send scheduling notifications to these volunteers.



ALLOW VOLUNTEERS TO SELECT THEIR OWN ASSIGNMENTS

1. Create a BLANK team template with only the specific number of roles that will be needed for that particular ministry for a specific date and time (see steps above).
2. From the Members tab for the team, add any and all potential volunteers for this team to the Planners area.
3. Add the roles to each individual as a skill.
 - a. Click on the name of someone on the team.
 - b. Click Edit, then click the Skills tab.
 - c. Click to open the drop-down list and select the roles/skills you would like to give the individual for this team. You might only have generic roles/skills for your team, but this step is crucial when you have very specific roles/skills that only certain people should be able to sign up for.
 - d. When you're finished adding the roles/skills, click Save.
 - e. Repeat for all members of the team.
4. Create an event for the date/time you need the volunteers for, if one does not already exist.
5. From the Schedules tab, scroll until you find the date and time that you need to schedule the volunteer team for.
6. With the Teams tab selected, click on the name of your volunteer team, select the blank team template (displays with a red side tab), and drag and drop into the appropriate team assignment card.



Volunteers that are a member of that team and have a role/skill associated with their profile will now be able to sign themselves up for the available volunteer position for that date and time.

Available sign-ups are displayed on the volunteer's dashboard when they log into WorshipPlanning.

