



Connecting With and Supporting Volunteers

Welcome

Please take a moment to locate the Zoom Webinar controls.
Feel free to say hello or ask a question using the Q & A feature.

Welcome – Introducing our Panelists



Mark Crain
Staff Trainer



Kelly Mullican
Education Coordinator



Agenda

- Connect with Volunteers
 - Forms
 - Group Finder

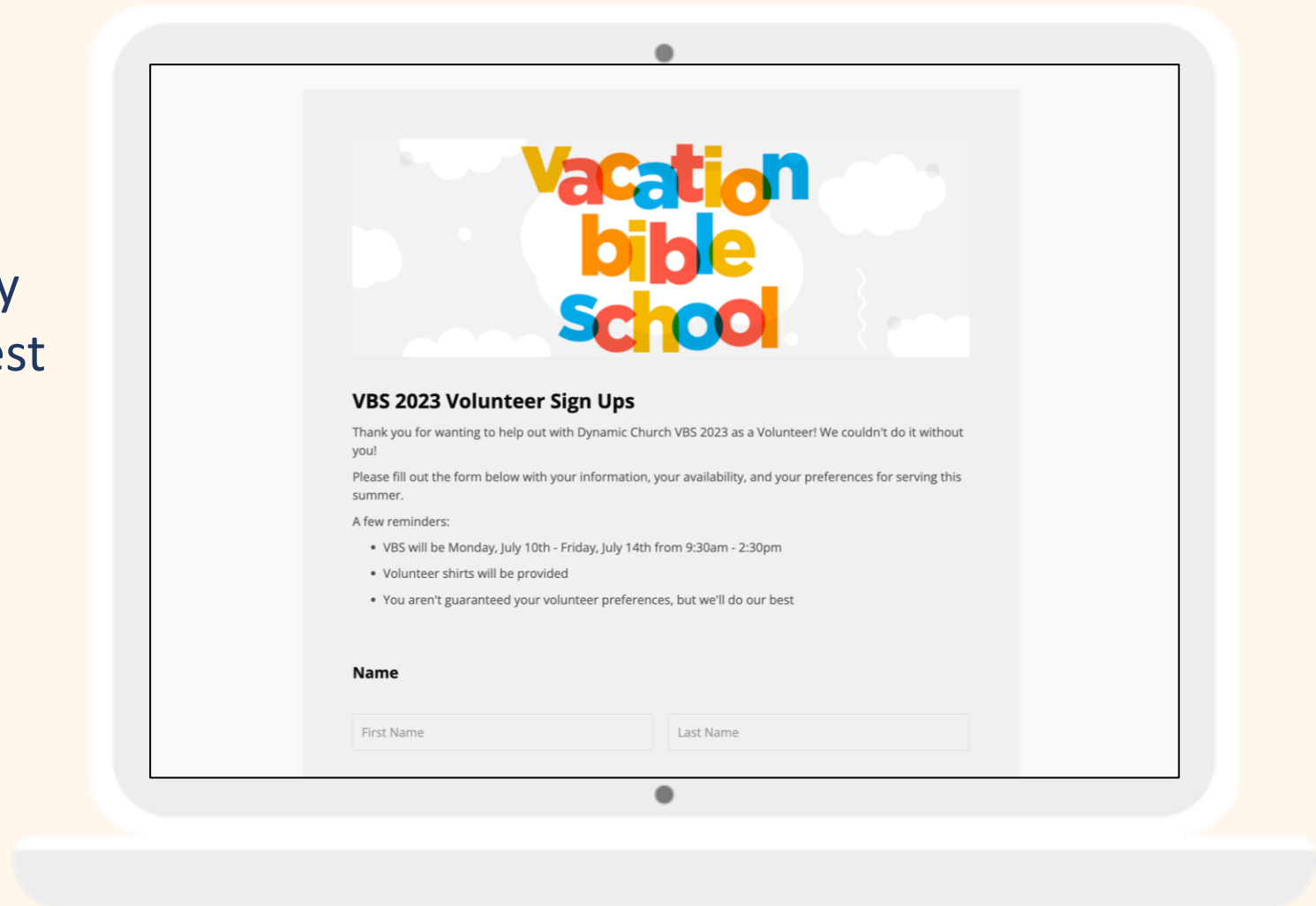


- Manage and Support Volunteers
 - ChMS Schedules
 - Worship Planning



Connect with Potential Volunteers Using Forms

Forms are a great, easy way to capture volunteer interest or sign up for specific volunteer positions and responsibilities!



Connect with Potential Volunteers Using Forms

Access the Forms manager from your ChMS database!

Create new forms using templates or from scratch, edit existing forms, check form submission responses, and more.

Don't see Forms? Talk with your system administrator about your permissions.

The screenshot shows the GRACE FELLOWSHIP ChMS database interface. The sidebar on the left contains a navigation menu with the following items: Individuals, Groups, Mass Contact, Interactions, Giving, Attendance, Reports, Calendar, Schedules, Workflows, Dashboard, and **Forms** (highlighted with an orange box). Below the sidebar is a 'COLLAPSE' button. The main content area is titled 'Forms' and features a search bar with the placeholder 'Search by name' and a filter icon. Below the search bar is a table with the following columns: Name, Created, Status, and Responses. The table contains the following data:

Name	Created	Status	Responses
Honorarium	3/15/2023	Unpublished	
Test	3/15/2023	Unpublished	
Welcome to Our Chu...	2/27/2023	✓ Publish	
Upload Test	2/20/2023	✓ Publish	2 Responses +2
Christian TEST	2/16/2023	✓ Publish	2 Responses
test	2/14/2023	Unpublished	
Give Now!	11/23/2022	✓ Publish	3 Responses +1
Live-Streaming Chec...	10/13/2022	✓ Publish	1 Response +1
Name field test	10/11/2022	Unpublished	

At the bottom of the interface, there is a pagination control showing '10 per page' and a list of page numbers (1, 2, 3, 4, ...).

Connect with Potential Volunteers Using Forms

The screenshot displays a form builder interface with several fields: 'Email (optional)', 'Phone Number (...)' (with a US flag icon and the note 'Accepts only numbers'), 'Preferred Method of Contact (optional)' (with radio buttons for 'Email' and 'Phone'), and 'Comments (optional)'. A dropdown menu for 'MBS Volunteer Tshirt Size...' is open, showing options: XS, S (highlighted), M, and L. A right-hand panel, outlined in orange, lists field types: Basic Fields (Short Text, Long Text, Checkbox(es), Radio Button(s), Dropdown, Date, Numbers, Letters), File Upload, Digital Signature, Slider, and Field Set (Basic). The bottom of the interface includes a 'Default' radio button, 'Clear Form', 'Undo Changes', 'Save as New Template', and a blue 'Save Changes' button.

Use Form Fields to capture simple information you need from your Volunteers.

- Ask questions with the Radio Button, Dropdown, and Checkbox fields
- Capture agreements with the Digital Signature
- Add relevant documents with File Upload
- Gauge interest with the Slider



Connect with Potential Volunteers Using Forms

The screenshot displays a form builder interface with several form fields on the left and a highlighted menu of field types on the right. The form fields include:

- Email (optional)
- Phone Number (with a dropdown for country code and a note: "Accepts only numbers")
- Preferred Method of Contact (optional) with radio buttons for Email and Phone
- Comments (optional)
- VBS Volunteer Tshirt Size... (dropdown)

The highlighted menu on the right lists the following field types:

- Field Set (i)
 - Basic
 - Person
 - Signup Slots
- Static Content (i)
 - Section Header
 - Static Content
 - Divider
 - Empty Space
- Contact Info Fields (i)
 - Person's Name
 - Email
 - Phone Number
 - Address
- Payment Fields (i)

At the bottom of the interface, there are navigation options: "All Forms", "Form Properties", "Preview Form", "Default" (with radio buttons), "Clear Form", "Undo Changes", "Save as New Template", and "Save Changes".

Use Form Fields to capture simple information you need from your Volunteers.

- Ask questions with the Radio Button, Dropdown, and Checkbox fields
- Capture agreements with the Digital Signature
- Add relevant documents with File Upload
- Gauge interest with the Slider
- Find out their name and contact information with the Contact Info Fields
- Add explainer text with Static Content



Connect with Potential Volunteers Using Forms

Signup Slots

Add Signup Slots to 'VBS Registration'.

Users can select multiple slots

Lesson Teacher

Pre-K and Kindergarten
2 Spots

1st and 2nd Grade
2 Spots

3rd and 4th Grade

Additional Form Fields can help you capture more specific information regarding specific volunteer opportunities, donations needed for your ministries or events, and more.

Lesson Teacher

Lesson Teacher Classroom Helper Activity Leader Activity Helper

Outdoor Games
2 Spots

Song Leader
4 Spots

Crafts
3 Spots

Skits
2 Spots



Connect with Potential Volunteers Using Forms

Publish your form quickly and easily to start connecting with Volunteers!

- Download and use a QR code
- Embed the form in your website
- Access the form using the Direct Link
- Set up and use texting keywords

(Access form publishing options from Form Properties within the Form builder)

The screenshot shows a 'Form Properties: VBS Registration' dialog box with several tabs: 'General', 'Advanced Theme', 'HTML', 'Submission', 'Payment', and 'Email'. The 'General' tab is selected. It contains a QR code with a 'Download' button below it. Below the QR code is a text area for 'Embed code' containing the script: `<script src="https://forms.ministryforms.net/embed.aspx?formId=ab89b182-cca3-4849-bfcb-7033686d3504"></script>`, with a blue 'Copy Embed Code' button below it. At the bottom, there is a 'Direct Link' section with the URL: <https://coaching.learnchms.com/external/form/ab89b182-cca3-4849-bfcb-7033686d3504>. At the bottom right of the dialog are 'Cancel' and 'Done' buttons.



Connect with Potential Volunteers Using Forms

The screenshot shows the Grace Fellowship software interface. The top navigation bar includes the logo, a search bar, and user information. The left sidebar contains a menu with items like 'Individuals', 'Groups', 'Mass Contact', 'Interactions', 'Giving', 'Attendance', 'Reports', 'Calendar', 'Schedules', 'Workflows', 'Dashboard', 'Forms', and 'COLLAPSE'. The 'Workflows' item is highlighted with an orange box. The main content area is titled 'Name' and 'Description'. The 'Name' field contains '*VBS Volunteer Follow Up'. Below it is a 'Form Submission' card with a green header and a message: 'The 2022 VBS Volunteer Sign-Up Form is submitted.' The card includes a 'Map' section with three rows of 'Choose a field' dropdowns mapped to 'Full Name', 'Cell Phone', and 'Email'. To the right of the card is a 'Group' section with a dropdown menu set to 'Add the person to' and a selected option 'EVENT - VBS Volunteers 2022'. Below this is a section for 'And/Or a group that matches exactly the value selected in this form field:' with a 'Select an Option' dropdown. At the bottom of the card are '+ Add Action' and 'Done' buttons. A 'Save' button is at the bottom left, and a 'Delete' button is at the bottom right.

Go one step further and create Workflows based on your Volunteer forms!



Connect with Potential Volunteers Using Group Finder



Use the Group Finder to allow people to search, explore, and ***add themselves*** to groups, classes, ministry teams, and more! You control all filter options - even the ability to search geographically!

No more 'man-in-the-middle.' When an individual joins, it emails the group leader with an individual's contact information and *adds the individual to the group! *(if you set it to - not required).

<https://documentation.learnchms.com/external/article/1822>



Connect with Potential Volunteers Using Group Finder

Name

Choose Leader(s)

Current Leader(s)
Mike (Michael) Rea

Description
 B I | | | | | Normal | Source
 During this class, we will be taking our High Schoolers through an in-depth study of the Gospels. Join us Sunday afternoons at 1:00 pm in the Student Center. Bring a Bible, a journal and a pen. See you there!

Address

City

Used on the Group finder

State

Zip Code

Meeting Day **Time**



Connect with Potential Volunteers Using Group Finder

Find A Group

Any Age Groups ▼

Any Day of the Week ▼

Any Group Purpose ▼

Any Meeting Day ▼

Any Meeting Time ▼

Find Groups Close To You

Enter your full address

View Map

Group

Details

Nursery Volunteer Interest

We are looking for volunteers to fill various roles in the nursery, These roles include caring for the infants, teaching Sunday Schools lessons to the 2-3 year olds, and more. Note that all volunteers will be required to submit to a background check before they are allowed to volunteer with any children.

Leader(s):

Abigail Adams

Day:

Time:

Join

Stewardship Committee 2023-2025

This group is for those interested in serving on the Stewardship Committee for the next two years. Note that this is a two-year commitment and requires the volunteer to be a member of the church in good standing.

Leader(s):

Steve Agard

Day:

Time:

Join



Connect with Potential Volunteers Using Group Finder

[Community Church | Classes & Groups](https://example.getstarted.church/connect/classes-groups)

<https://example.getstarted.church/connect/classes-groups>





Manage and Support Volunteers Using ChMS Schedules

- Schedules are a fantastic tool to organize your weekly volunteers and events. Whether you are using it to schedule 1 week or the entire year, your volunteers will know exactly when and where they are expected to be and with the built-in communication tools, they will always be kept in the loop.

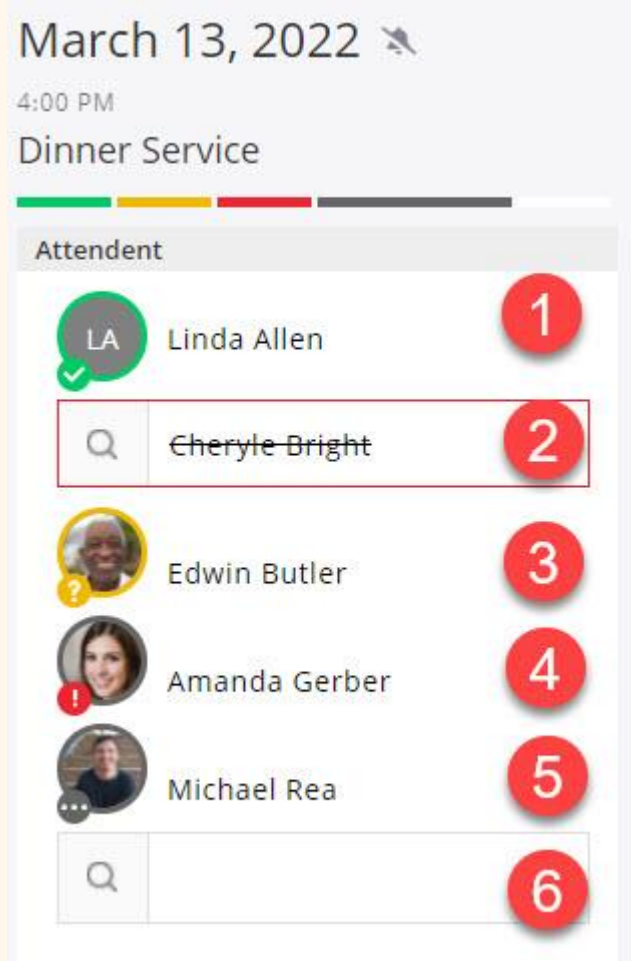
Children's Classes

December 1

9:00 AM First Service	10:30 AM Second Service
<p>1st & 2nd Grade</p> <p>Helper</p> <ul style="list-style-type: none"> Greg Abraham John Armstrong <p>Teacher</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="text" value="Julia Abraham"/> </div>	<p>1st & 2nd Grade</p> <p>Helper</p> <ul style="list-style-type: none"> Keith Franz Mandy Franz <p>Teacher</p> <ul style="list-style-type: none"> Sandy Franz
<p>3rd & 4th Grade</p> <p>Helper</p> <ul style="list-style-type: none"> Racheria Albright Marcus Albright <p>Teacher</p> <ul style="list-style-type: none"> Samantha Smith 	<p>3rd & 4th Grade</p> <p>Helper</p> <ul style="list-style-type: none"> Thomas Milborn Jack Smith <p>Teacher</p> <ul style="list-style-type: none"> Samantha Smith



Manage and Support Volunteers Using ChMS Schedules



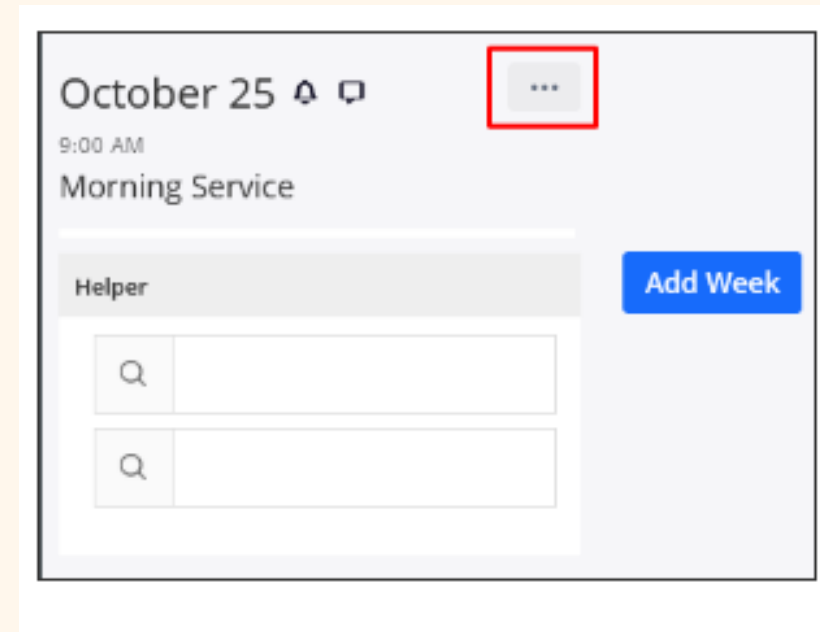
- On the schedule grid, positions can show one of several statuses
 - 1) Accepted - Name with a green checkmark
 - 2) Declined - red search box, a name with strike-through
 - 3) Pending (Notified) - Name with yellow "?"
 - 4) Not Notified (No email address!) - Name with a gray and a red "!"
 - 5) Not Notified - show as a name with a gray "..."
 - 6) Unfilled (blank) - show as a blank search box



Manage and Support Volunteers Using ChMS Schedules

Specific actions include:.

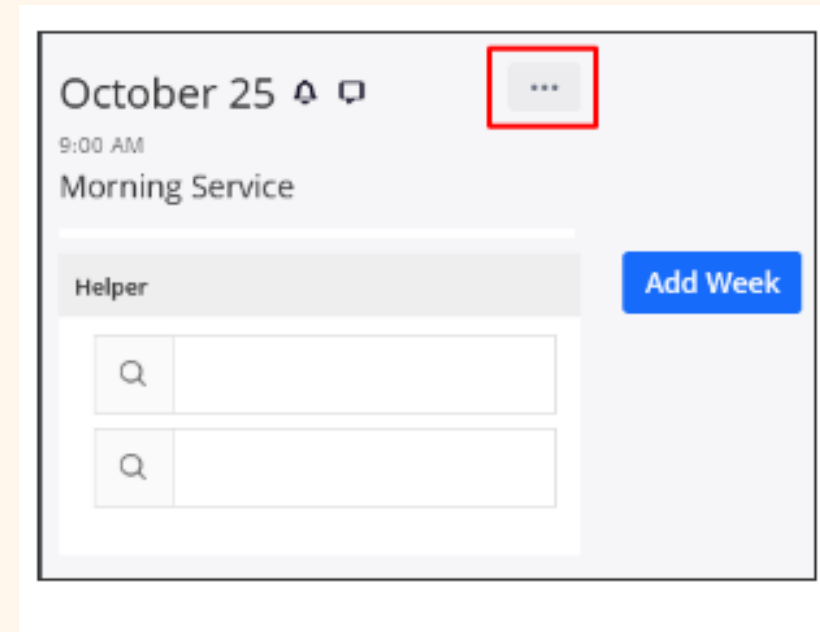
- Copy Volunteers from Previous: Fills in an entire Date (or time, or team) with a couple of clicks. Select the date/time to copy from, and then adjust specifics or exceptions as needed before sending invitations.
- Mark as...: Set the status for an individual or set an entire team or time as "Confirmed".
- Send Invites: Sends a simple Serving Request email from your church
 - Select "Send Invites" for a specific team, time, or date. Or, use "Send Invites to All" to work individuals across all dates on this schedule.
 - The email includes a "Respond to Requests" link that allows the Volunteer to Accept All, Decline All, or to Accept/Decline each specific item, no log-in needed.



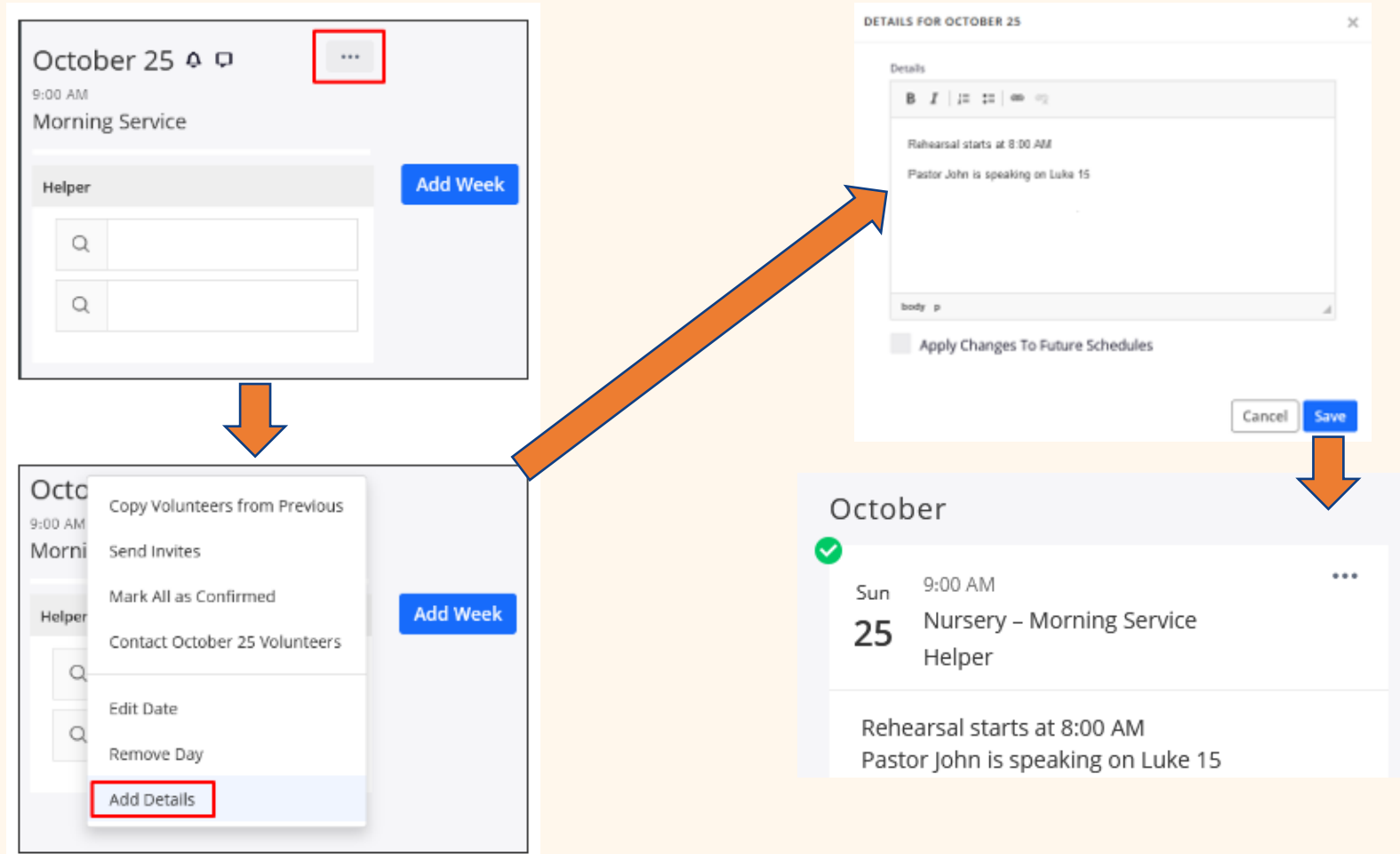
Manage and Support Volunteers Using ChMS Schedules

Specific actions include:

- Remove/Add to change any elements (individuals, positions, teams, or times) included on this specific date (without affecting other dates or the future schedules you create)
- Contact: to send a quick email to everyone scheduled for that position, team, time, or date. You can specify what statuses to include (Pending, Accepted, etc.). Contact works for all dates, past, and future.



Manage and Support Volunteers Using ChMS Schedules



Manage and Support Volunteers Using ChMS Schedules

Sending Reminders:

- Use the bell icon to open the reminders tool. You will be presented with an easy-to-read modal that shows all the reminder options available to you.

REMINDER ON

SEND AS

Email SMS Text Email & Text

Include Pending ⓘ 15 Missing Contact Info >

You are scheduled to serve Jun 14, 20 for Sunday Worship. For details, you can view your schedule here <https://min.link/>.

1 day before at 10:00 am

+ ADD REMINDER TIME

Apply Changes To Future Schedules

June 14

9:00 AM First Service

10:00 AM Second Service

Crawlers

Coordinator

TA Tim Ashland

June 14

9:00 AM First Service

10:00 AM Second Service

Crawlers

Coordinator

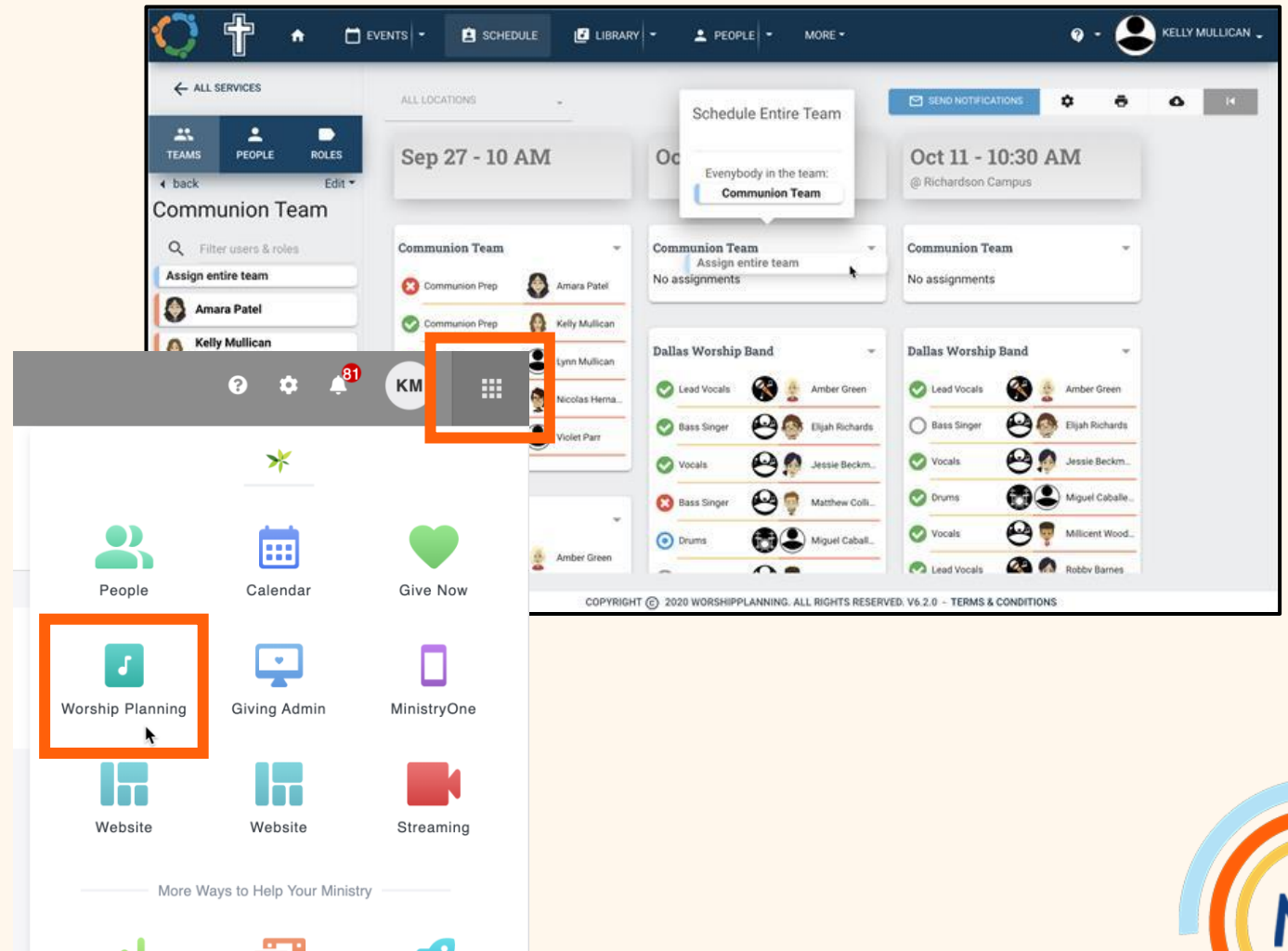
TA Tim Ashland



Manage and Support Volunteers Using WorshipPlanning

WorshipPlanning allows you to create specific teams for your volunteers and ministries, schedule those teams or individuals, and even allow your volunteers to sign themselves up for volunteer opportunities!

Integration with your ChMS makes this easy.



Manage and Support Volunteers Using WorshipPlanning

Build teams to manage your ministry volunteers.

Add roles so you know what the team is responsible for.

Be specific or keep them generic – it all depends on your church and your ministries!



The screenshot displays the 'Communion Crew' team management interface. At the top, the team name 'Communion Crew' is prominent, followed by the team leader 'Kelly Mullican'. A navigation bar includes tabs for MEMBERS, ROLES, TEMPLATES, AVAILABILITY, FILES, SETTINGS, and ASSIGNMENT REMINDERS. The 'MEMBERS' tab is active, showing a list of team members: Allison Bailey, Amalia Lara, Amara Patel, Amber Green, Amy Parsons, Annie Soete, and Benjamin Lara. A 'Team Roles' section is also visible, listing roles such as Bread Passer, Cleanup Crew, Communion Prep, Communion Reader, Communion Setup, and Juice Passer. A 'Team Members' section is partially visible, showing a list of members and a 'Team Roles' section with a 'CREATE A NEW ROLE' button. A 'SCHEDULE THIS TEAM' button is located at the top right. A 'SEND MESSAGE TO TEAM' button and a 'MESSAGE NEW MEMBERS' button are also present. A 'Filter by Name' search bar is located above the member list. A 'DONE' status is shown at the top left of the main content area. A 'COLLAPSE' button is visible in the bottom left corner of the sidebar. A small tooltip 'Assign to Team' is visible over the 'Amara Patel' member card. The sidebar on the left contains navigation options: My Schedule, Events, Schedules, People, Library, Messages, My Quick Links, and a COLLAPSE button. The top navigation bar includes a cross icon, a gear icon, a question mark icon, and a user profile icon.

Manage and Support Volunteers Using WorshipPlanning

Team Templates allow you to build out your volunteer positions *now* and decide who will fill those positions *later*.

A great building block to start planning events months in advance.



The screenshot displays the 'Communion Crew' team template configuration page. The interface includes a dark blue sidebar on the left with navigation options: My Schedule, Events, Schedules, People, Library, Messages, My Quick Links, and a COLLAPSE button. The main content area features a header with a cross icon and a user profile picture. Below the header, the team name 'Communion Crew' is prominently displayed, followed by the team leader 'Kelly Mullican'. A horizontal menu allows switching between MEMBERS, ROLES, **TEMPLATES**, AVAILABILITY, FILES, SETTINGS, and ASSIGNMENT REMINDERS. A blue button '+ CREATE A NEW TEAM ROLE TEMPLATE' is positioned above a list of roles. The 'ROLES' tab is active, showing a list of roles: Coffee Prep, Communion Prep, Communion Reader, Communion Setup, Communion Team, Computer, Counselor, Cymbal, and Drums. A detailed view of the 'Communion Sunday Template' is shown on the right, listing roles and their status: Juice Passer (two instances), Communion Setup, Bread Passer (three instances, each with a profile picture), and Communion Prep (two instances). On the far right, a vertical panel contains three buttons: 'SCHEDULE THIS TEAM', 'SEND MESSAGE TO TEAM', and 'MESSAGE NEW MEMBERS'.

Manage and Support Volunteers Using WorshipPlanning

The drag & drop scheduling page makes selecting and changing volunteers and roles within your teams easy.

Schedule an entire team all at once, fill in the blanks from a team template, or select roles and volunteers individually.



A screenshot of the WorshipPlanning software interface. The top navigation bar is dark blue with a white cross icon on the left and settings, help, and user profile icons on the right. A left sidebar contains a menu with items like 'My Schedule', 'Events', 'Schedules', 'People', 'Library', 'Messages', and 'My Quick Links'. The main content area is titled 'ALL SERVICES' and 'ALL LOCATIONS'. It shows a specific service for 'Mar 19 - 10 AM' with a 'Communion Crew' team. A 'SEND NOTIFICATIONS' button is visible. Below the team name, there are tabs for 'TEAMS', 'PEOPLE', and 'ROLES'. A search bar 'Filter users & roles' is present. A list of team members is shown, including Amara Patel, Amy Parsons, Annie Soete, Brian Murray, Kanome Jones, Kelly Marie Mullican, and Kelly Mullican. A modal window titled 'Assign Person' is open, showing a dropdown for 'Communion Crew' with three 'Bread Passer' roles. Below this, an 'Assign Person' section shows 'Brian Murray' being assigned to the role of 'Juice Passer'. At the bottom of the modal, a list of roles and volunteers is shown, with 'Juice Passer Brian Murray' selected. The footer contains legal notices: 'IS - PRIVACY POLICY - CALIFORNIA PRIVACY NOTICE - COOKIE NOTICE - DO NOT SELL OR SHARE MY PERSONAL INFORMATION' and 'COPYRIGHT 2023, MINISTRY BRANDS HOLDINGS, LLC. ALL RIGHTS RESERVED. V6.3.0'. A small code snippet 'javascript:void(0);' is visible in the bottom left corner.

Manage and Support Volunteers Using WorshipPlanning

Once you've scheduled your volunteers, make sure they're notified!

Notifications can be sent via email or text message and volunteers can easily respond with their intent to serve.

← BACK

Send Notifications

Use the checkboxes to indicate the teams and services for which you'd like to send notifications.

Which Events?

Showing events in all locations

- Select All Events
- Sun, Mar 19, 2023 - 10 AM

Which Teams?

- All Teams
- Only teams I lead
- Children's Service Leaders
- Children's Worship
- Coffee Crew
- Communion Crew
- Counselors

* You don't lead this team, but you can still send out notifications.

Which Status(es)?

- All Statuses
- Default (Penciled In only)
- Notification Unable to be Sent
- Penciled In
- Awaiting Response
- Accepted
- Declined
- Tentatively Accepted

SEND NOTIFICATION

Previously sent messages

You Have Been Scheduled to Serve

Subject

TERMS & CONDITIONS - PRIVACY POLICY - CALIFORNIA PRIVACY NOTICE - COOKIE NOTICE - DO NOT SELL OR SHARE MY PERSONAL INFORMATION
COPYRIGHT 2023, MINISTRY BRANDS HOLDINGS, LLC. ALL RIGHTS RESERVED. V6.3.0



Manage and Support Volunteers Using WorshipPlanning

Volunteer responses appear automatically on the Schedules page.

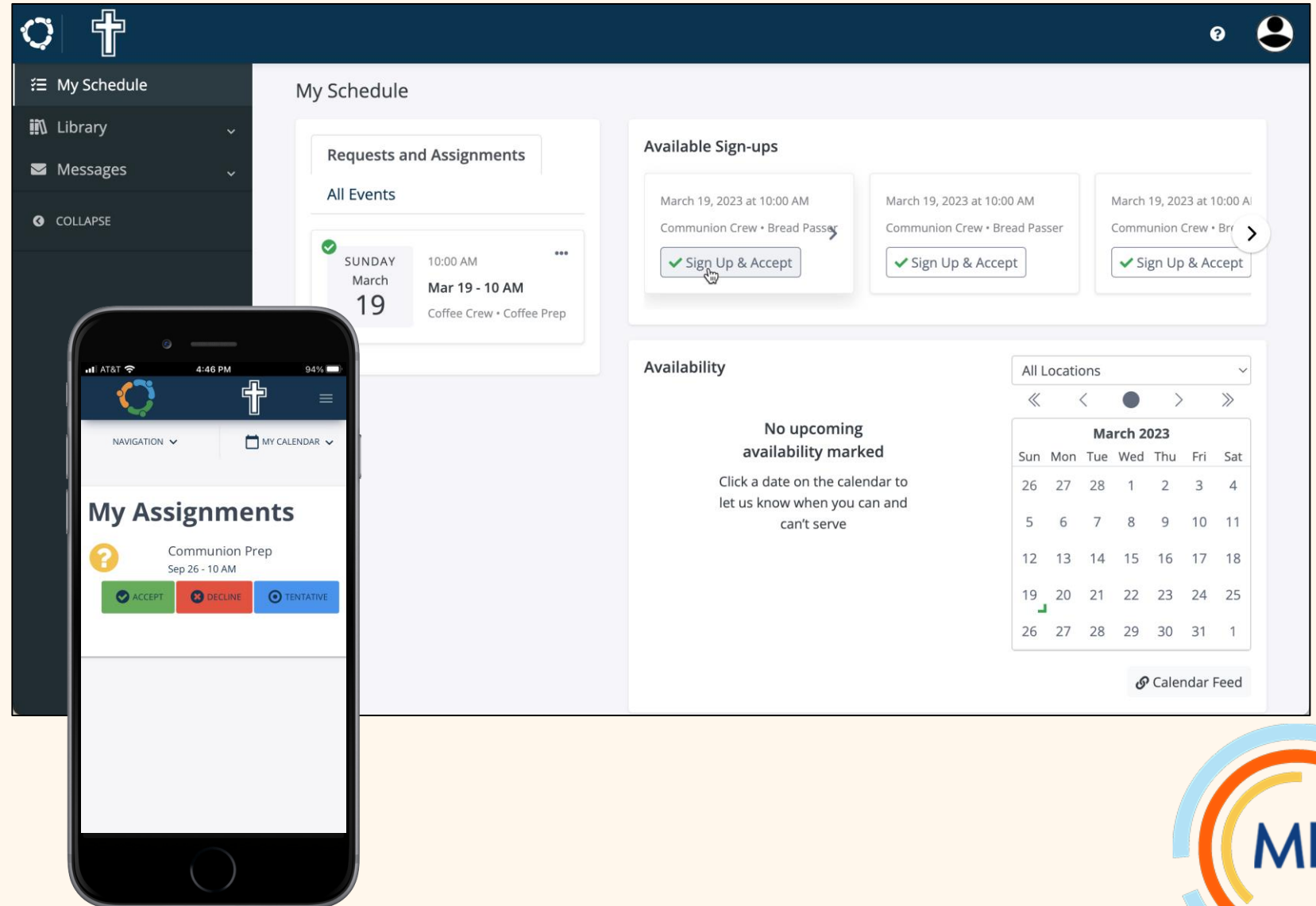
You'll know who can help, who you need to substitute, and who you need to follow up with.

The screenshot displays the WorshipPlanning interface. On the left is a dark sidebar with navigation options: My Schedule, Events, Schedules, People, Library, Messages, My Quick Links, and a COLLAPSE button. The main content area is titled 'ALL SERVICES' and 'ALL LOCATIONS'. A 'SEND NOTIFICATIONS' button is visible. The central focus is a schedule for 'Mar 19 - 10 AM'. A list of teams is on the left, including Children's Service Leaders (10), Children's Worship (8), Coffee Crew (11), Communion Crew (15), Counselors (6), Creative Ministry (6), Dallas Worship Band (8), Hospitality (12), Parking Lot (6), Prayer Team (6), Readers (5), Security (6), Set Up and Tear Down (5), and Team Templates (1). The 'Counselors' team is expanded, showing a list of assignments with status icons: Annie Soete (checked), Brian Murray (question mark), Marie Mullican (minus), Mark Abbott (cross), Martin Mullican (checked), Sarah Weir (circle), and Tia A McPher... (circle). Below this, a 'Counselors' dropdown shows 'No assignments'. At the bottom, there is a footer with legal notices: 'IS - PRIVACY POLICY - CALIFORNIA PRIVACY NOTICE - COOKIE NOTICE - DO NOT SELL OR SHARE MY PERSONAL INFORMATION' and 'COPYRIGHT 2023, MINISTRY BRANDS HOLDINGS, LLC. ALL RIGHTS RESERVED. V6.3.0'.



Manage and Support Volunteers Using WorshipPlanning

- Volunteer portal dashboard
- Calendar – mark availability
- Receive email (and/or text) notifications for volunteer schedule assignments
- Volunteers can view and sign up for available opportunities



Agenda

- Connect with Volunteers
 - Forms
 - Group Finder



- Manage and Support Volunteers
 - ChMS Schedules
 - Worship Planning

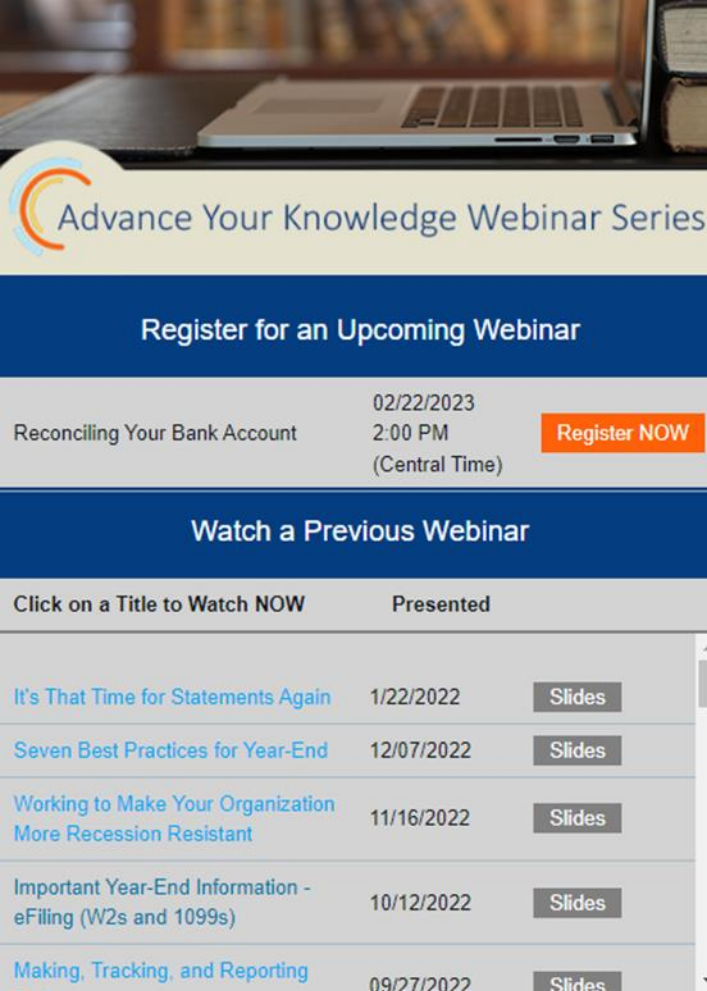


Where can I watch this webinar again?

**Watch or Register to attend
Webinars**

@ Community.Shelbysystems.com

No Login Required!



The screenshot displays the 'Advance Your Knowledge Webinar Series' website. At the top, there is a navigation bar with the series title. Below this, a dark blue banner reads 'Register for an Upcoming Webinar'. Underneath, a card for an upcoming webinar is shown: 'Reconciling Your Bank Account' on 02/22/2023 at 2:00 PM (Central Time), with a 'Register NOW' button. A second dark blue banner reads 'Watch a Previous Webinar'. Below this is a table with columns for 'Click on a Title to Watch NOW' and 'Presented'. The table lists five previous webinars, each with a 'Slides' button.

Click on a Title to Watch NOW	Presented	
It's That Time for Statements Again	1/22/2022	Slides
Seven Best Practices for Year-End	12/07/2022	Slides
Working to Make Your Organization More Recession Resistant	11/16/2022	Slides
Important Year-End Information - eFiling (W2s and 1099s)	10/12/2022	Slides
Making, Tracking, and Reporting	09/27/2022	Slides



The Next Advance Your Knowledge Webinar

Preparing to Sail into Summer Activities

April 26, 2023
3:00p E / 2:00p C

[Link to register here](#)

