Creating and Editing Activities in Better Impact:
Steps and Guidelines for VCE Master Volunteer Programs

Activities (aka projects, continuing ed opportunities, administrative tasks, events) are the backbone of our Volunteer Programs. The Better Impact Volunteer Management System (BI-VMS) is the critical tool that facilitates the ability to find out about and then report volunteer hours spent on these Activities. **Thus, it is important to set up your Activities in Better Impact completely and accurately**, in order for them to be the most useful to you as an Administrator/Project Leader and to the volunteers who will be looking for and reporting hours to them.

We have made it very easy for you by giving you important step-by-step instructions and guidelines for creating and editing your Activity. Once you do this, you will discover how quick it becomes to create the next Activity *(see end for an easy step for this.)* Please be vigilant and make sure to follow the steps below. These are critical steps and guidelines that are specific to our VCE Master Volunteer Programs - particular ways we ask you to set up activities so that we all can adhere to program policies and gather data needed for reports.

You will find helpful tips throughout this guide and more at the end for Activities you have already created. There are also many general help documents and videos related to activities in Better Impact's Help Center and on BetterImpact.tv.

Please share this guide with all Administrators who may be adding new Activities to Better Impact, which may include Project Leaders or those wanting to add items to the BI-VMS Opportunity Calendar.

BASIC VOCABULARY TO KNOW IN BETTER IMPACT (BI)
- **Category** = A group of approved projects with similarities that make it easier for volunteers to find them and for reports to be run OR one approved project (as known in the old VMS) with several different reportable tasks, *e.g., Administrative, Stewardship, and Citizen Science.*
  NOTE: Continuing Ed (CE) must have its own Category in BI-VMS so that CE hours can be separated out from Volunteer Service hours in reports.)
  Most all Activities should be under a relevant Category.
- **Activity** = Specific approved volunteer activity within a Category. Volunteers report their hours to specific Activities on the list. They also can search for, sign up for, or be scheduled for Activities.
- **Report Group** = Defined at state level and used for reporting purposes at any level. **All Activities must have a Report Group chosen for it.** *Examples: VMN Chapter Administration, VMN Education & Outreach, EMG Food Security, MFV Food Safety.*
- **Shifts** = Separate days and/or times for one Activity
- **Feedback Fields** = What the volunteers actually report, in addition to hours.
- **Assign** = The approval or scheduling of volunteers to an Activity by an Administrator

TIPS
- Hover cursor over the little black 'notebook' next to BI selections throughout to find a menu of options.
- The small green 'i' buttons next to text have good information in them. Click on them to read.

TO CREATE YOUR CATEGORIES AND ACTIVITIES IN BETTER IMPACT

1. Log in to the Administrator module of Better Impact at https://admin.betterimpact.com (easier to remember) or https://app.betterimpact.com/Login/Admin.
2. Go to CONFIG icon (at the top left) → Activities → Manage Activities (in the left-hand menu)
3. Click on the green button next to Activities heading (or at bottom of Activity list), and choose to create a New Category, a New Activity, or a New Activity from a Template. In some cases, the state office may have provided a template for the Activity for you to edit. *(Check with your state program office if you have questions about this.)*
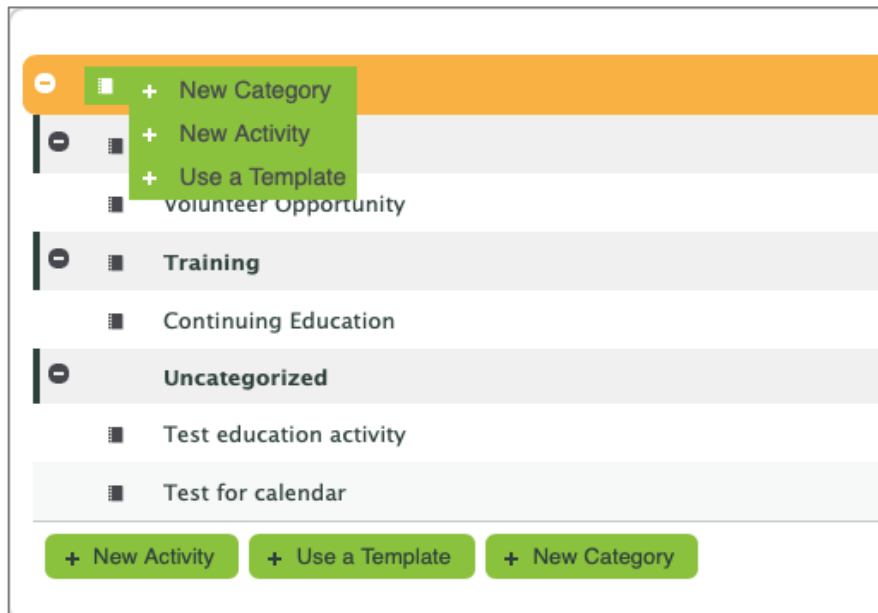

Figure 1: Choosing what you want to create in BI-VMS

Creating or Adding to a Category – Do First

A Category is a way of grouping Activities. Categories are important for the ease of your volunteers and for the reporting you each will need to do later. **Important** - **most all Activities should be listed under a relevant Category.**

You may find that your Activity will fit into an **already-created Category**. (*See below for examples, then skip to "Creating an Activity" section.*) Choose that one from the dropdown menu on the Basic Info tab, when creating your Activity. Otherwise, follow the steps below to create a new Category.

IMPORTANT - Your chapter/unit will want to discuss how you want to organize your Categories and Activities, now and in the future, before you create or add to them in Better Impact. You may find you will need to reorganize them once you've tested them out but it's easier to first have a plan.

Categories can be approached in several ways and can be mixed and matched.
Category format examples:

1. (Most common) A Category could be a group of independent Activities that share a common trait. *For example:*
    a. **Bird and Wildlife Monitoring** (the Category) - then with the various volunteer service Activities listed within it
        1. Great Backyard Bird Count (Cornell U)
        2. Frog Survey
        3. Va Bird and Wildlife Trail Monitoring (DWR)

2. A Category can also be essentially an approved project but one that has many related Activities to which volunteers would report hours. This can be important if you provide annual reports to this partner directly. *For example:*
    a. **xxx State Park - DCR** (the Category), under which are the Activities:
        1. Trail maintenance (stewardship)
        2. Interpretive hikes (education)
        3. Plant inventory (citizen science)

IMPORTANT for VMN Chapters! **A Continuing Education (CE) category has been created for you. ALL CE activities that volunteers would report hours to MUST be reported to this one single Continuing Education category.** This is the only way for CE hours to be separated out from Volunteer Service hours.

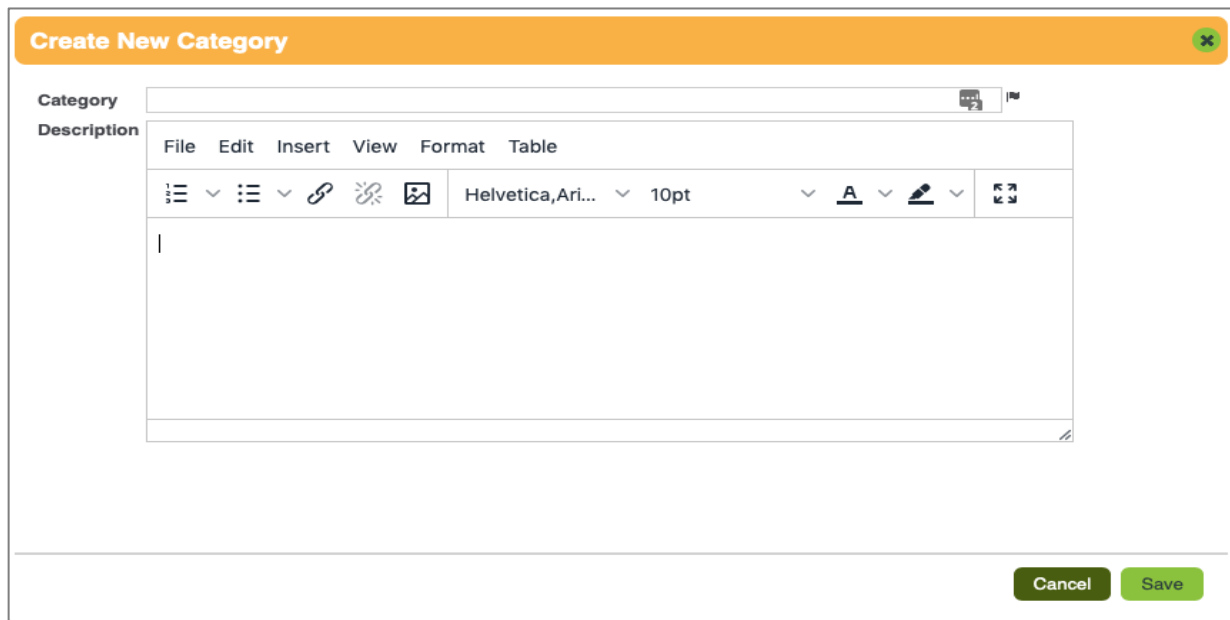## Steps to create a new Category
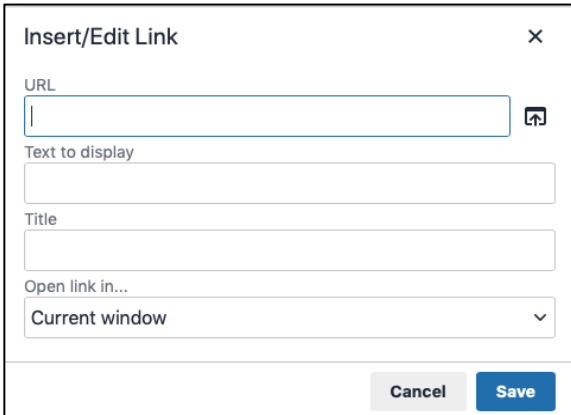

Figure 2: Creation of new Category section

Click on the green "+ New Category" button mentioned above when in your Manage Activities section.

1. **Give the Category a clear and descriptive name.** You do not need to include the Report Group in the name, because ALL the Activities will get assigned to particular Report Groups when they are created. For the VMN program, if the entire Category is one that is directly with one of our sponsoring agencies, please put that sponsor's acronym in the Category name (e.g., DCR State Park Stewardship.) If the Category includes Activities with different sponsors, then you do not need to add the sponsor's name to the Category. Instead, you will put it in the Activity name, or possibly as part of the site's Feedback Fields (*see "Creating an Activity" section*.)

2. **Give the Category a description.** This is a good place to put general information about your projects or an explanation of what this Category may include. You can include links to external URLs, or you can add a new document or image here and upload it to the File Manager for use in this listing. (You can also add them when creating an Activity.)

Creating an Activity

Click on the green "+ New Activity" button mentioned above when in your Manage Activities section.

- **Be sure that there is an existing Category** that you will add the Activity to before creating this.
- Make sure that the Activity (or its Category) is an approved project or continuing education activity if volunteers are to submit hours to it.
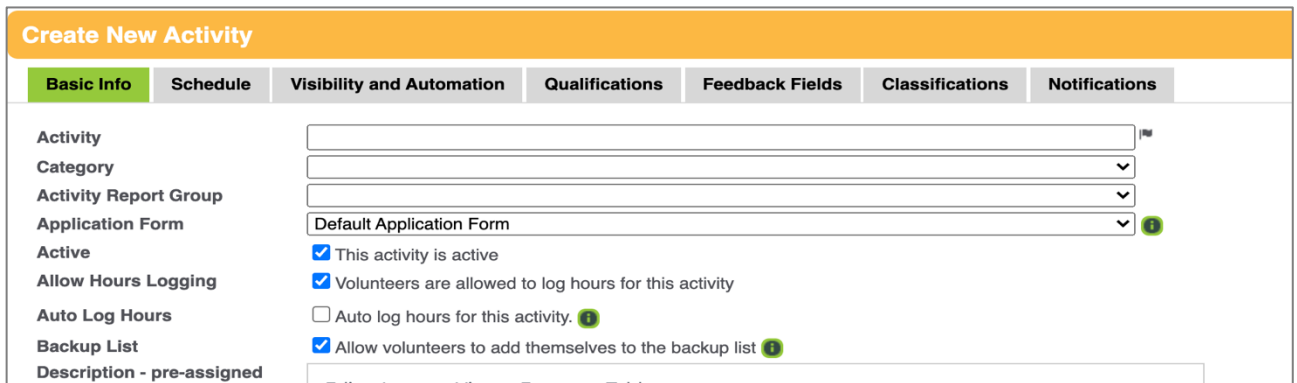
Tab 1: Basic Info

Figure 3: Tab 1 – Basic Info section (partial view)

- **Activity Name:** Give a descriptive name that will be easy for the volunteer to understand and be useful in reporting. For VMN, if the whole Activity is with a specific partner organization, especially one of the state sponsoring agencies, indicate that somewhere in the activity name if it is not in the Category name (see below.) If, instead, the Activity happens in multiple locations,

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some of which are with sponsoring agencies and some not (such as with bluebird monitoring, which might happen at local parks but also DCR State Parks), then you might choose instead to capture the sponsor information as part of the Feedback Fields. *(See "Tab 5: Feedback Fields.")*

- **Category:** Choose which broader project or group of projects this Activity fits under. If it does not fit under any existing Category, you will first need to create a new Category, making sure that there is an approved project for it or this Activity.
  IMPORTANT for VMN Chapters – If an Activity is one to which Continuing Ed hours would be reported, it MUST be in the chapter's one single CE Category. This is so these CE hours can be separated from Volunteer Service hours.
- **Activity Report Group: Always specify the Activity Report Group**. This MUST be added for all Activities. First, find your program's Report Groups in the dropdown menu by looking for the three-letter program code (EMG, VMN, MFV, etc.). Then choose the appropriate Report Group for the activity. **If you do not follow these directions, it will not be possible to get the necessary data for annual reports.** Using the Report Group also will spare you from having to include complicated coding in your activity name.
- **Application Form:** For all our VCE programs, please leave as "Default Application Form".
- **Active:** If the Activity is something volunteers can participate in (which is most cases), choose "This activity is active". If left unchecked, this Activity will not show up in the volunteers' Opportunity List. You may want to leave it as an 'inactive' Activity in many situations - for example, if it is no longer going on but will again next year. This saves you from recreating it again next year, while keeping the Opportunity List manageable and less confusing. Or you might be currently working on getting the activity approved or getting additional information that is needed before volunteers can sign up. (You will easily find these again by filtering on 'inactive' or 'do not filter' status.)
- **Allow Hours Logging:** If the Activity is something volunteers can participate in and it is approved for volunteer service or CE hours (which is most cases), choose **"Volunteers are allowed to log hours for this activity."** If you do not check this box, volunteers can see and sign up for the Activity but **cannot** log hours for it. You might use this option for social activities that you want to put on the BI-VMS Calendar, but that are neither CE nor volunteer service. You may also choose to leave the box unchecked if your chapter/unit wants to list lots of CE opportunities on the BI-VMS Calendar but have volunteers report all their CE to only one central CE Activity.
- **Auto Log Hours:** Checking this box causes hours to automatically be reported for a volunteer if they signed up for an activity. **You should leave this unchecked**, because a volunteer might sign up for something and not show up, thereby causing unearned hours to be automatically added to their records.
- **Backup List:** This allows a volunteer to sign up for a waiting list if an Activity is full.
- **Description (pre-assigned):** This important box is where to put all the information a volunteer might need to know about an activity before they sign up. You can include links, such as to a website for more information or where they should register, or documents and images about the Activity. *(See "Creating a Category - Adding links or documents to your description" on how*

to do this.)

IMPORTANT

Many activities you may wish to add to BI-VMS might be hosted by an outside organization which requires the volunteer to register **with them** in order to participate. To make sure the volunteers don't mistakenly use the BI sign-up button for this, **be sure to add a bold note and link to that other website in the pre-assigned box.** *For example:* DO NOT USE THE SIGN-UP BUTTON HERE. PLEASE REGISTER WITH xxx AT THIS LINK.

See more on ways to help mitigate this in "Disabling Sign-Up Button" at the end of this document.

- **Description (post-assigned):** This is information that is only visible to a volunteer **after** they have signed up for an Activity. This could be used if you want to limit the sharing of details for an Activity to those who actually plan to attend/participate, such as where to meet, what to bring, etc. You can include links to maps or documents (external or through File Manager.) **Please be aware that this won't appear to anyone who doesn't use the BI-VMS sign-up button feature for this Activity or hasn't been assigned to the Activity by an Administrator.** You may still want to make those details available elsewhere to everyone.

- **Internal Notes:** This is any other information you want to document about the Activity, but it is only viewable to Administrators.

Figure 4: Description and Internal Notes sections for Tab 1 (Basic Info)

Tab 2: Schedule

Figure 5: Tab 2 – Schedule section

Your next step is to choose the Schedule Type for the Activity, then fill in the 'shifts' for it, if applicable. The choices are:

- **Recurring Pattern:** This is for Activities with regularly occurring shifts (*e.g., EMG Help Desk*.) Examples include every Wednesday morning, every second Friday of the month, etc.
- **Disjointed:** This is for Activities that do have scheduled times, but not on any pattern. If you choose this option, you can add scheduled times or days (shifts) as they come up. An example might be workdays for pulling invasive plants.
- **One Time:** This is for Activities that will only occur once.
- **Seasonal:** This is for Activities that are only available between certain dates but are otherwise unscheduled. Since no specific dates are added as shifts, these will only show up on the volunteer's Opportunity List, not their Opportunity Calendar.

No Schedule: This is for those Activities that have no scheduled events, one that the volunteer chooses when to do on their own time.

NOTES:

- If an activity is held over multiple consecutive days *(e.g., Great Backyard Bird Count),* each day has to be entered as a separate shift for that one Activity.
- If an activity repeats itself every year, you can simply add new shifts to the same Activity to include those dates in the following year. This prevents you from having to re-create the whole Activity all over again. **Note**: This kind of Activity **should be made 'inactive'** once that year's shifts are over, to hide it in the Opportunity List that volunteers see. This makes it easier for them to see only the currently active Activities. Simply uncheck the Active option on the Activity's Basic Info tab.
- You can change the Schedule Type later if the nature of the activity changes. Remember that if you want to make this change and have shifts set up for it, you may be told to remove those shifts before changing the Type. If anyone has signed up for a shift, BI-VMS may instruct you to take other actions before changing the Type.

Tab 3: Visibility and Automation

Figure 6: Tab 3 – Visibility and Automation section

Your next step is to choose who can see this Activity and sign up for it, what happens when they sign up for it, and how many people can participate.

- **Visible To:** Choose who can see this Activity and sign up for it. If you are making it visible to all volunteers (versus only volunteers who are assigned to the Activity by an Administrator), you **must** check the boxes for "Accepted" and "If Qualified" to make sure that the Activity is only available to currently enrolled volunteers.
- **Self-scheduling:** Choose whether to automatically approve (aka 'assign') volunteers for the activity if they sign up for it. Unless there is an exception, **it is important that you check this box**. If it isn't checked, an Admin will have to monitor and approve all **Pending Sign-ups** before the volunteer can see a confirmation or be able to use the tools that signing up allows them. *(See more on Pending Sign-ups in Tip box below.)*
  Only Accepted, Qualified volunteers should ever be automatically assigned, so do not check the boxes for Applicant, In Process, or Inactive.
- **Auto Lock:** Set the system to automatically cut off sign-ups once the maximum number of volunteers have signed up. *(See "Disabling the Sign-Up Button" for circumstances when you may want to set this up as a critical workaround.)*
- **Minimum and Maximum Volunteers:** The minimum number does not impact sign-ups, but the maximum number will be the limit for sign-ups if you also have turned on the Auto Lock feature.
- **Allow volunteers to remove themselves:** In most cases, you will want to check the box to allow volunteers to remove themselves from an assignment.
- **Cut off sign-up for shifts of this Activity xxx hours before the shift begins:** This option appears for those Activities that have been given date/time shifts. Checking this box depends on the Activity's preferences. However, **this option is very important to use if you want to hide the sign-up button.** *(See "Disabling the Sign-Up Button" for circumstances when you may want to set this as a critical workaround.)*

<div style="border:1px solid #000; padding:10px;">

TIP

Get into the habit of having an Admin check to see if there are any **Pending Sign-ups** on the Admin homepage in the list under the green circles in the Status Update box (Figure 7). A volunteer may have signed up for one of the Activities that didn't have the **Self-Scheduling** box checked. Click on this Status Update notation, then hover over the 'notebooks' next to each name for more options. Until 'assigned', a volunteer who signed up won't get their Activity notices.
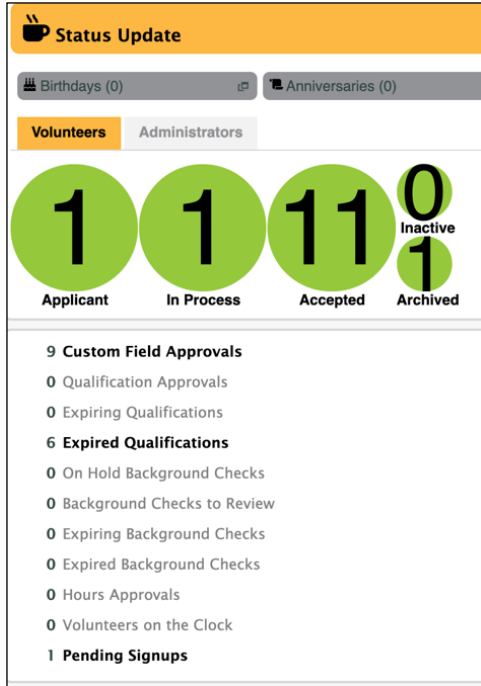
</div>

Figure 7. Status Updates on Admin homepage, showing the Pending Signups listings at bottom.

Tab 4: Qualifications

Figure 8: Tab 4 – Qualifications section

On this tab, you can limit the Activity to those volunteers who have certain qualifications. Qualifications are created at the state level and applied to the relevant programs, so you will only see Qualifications that pertain to your program in the list of possibilities. If you leave a Qualification box blank, that Activity will not require that Qualification.

Tab 5: Feedback Fields

Figure 9: Tab 5 – Feedback Fields section

This tab is where you will choose which fields a volunteer will be able or need to fill in for this particular Activity when reporting hours to it. Having Feedback Fields are very important, as this is where we all can gather more detailed information about a volunteer's task and the impact related to the Activity, which we then can share with our partners and funding agencies. **Pay extra attention here, because your choices will affect your reporting ability later**, especially if you are creating your own chapter/unit Feedback Fields.

Feedback Fields can be mandatory or optional to answer when hours are reported. They also allow for four types of responses: long text, short text, number, or choices from a dropdown menu. Note that while freeform text can give you much needed information about a project, you may prefer to ask for a dropdown menu or number response for certain fields, which will allow for ease of sorting in a report later. Administrators can generate reports to see all Feedback Fields. When volunteers look at reports of their own hours on MyImpactPage.com, they will only see Feedback Fields that are numbers or dropdown boxes, not freeform text.

We have created some statewide Feedback Fields to choose from, several of which we **strongly advise or require all Activities to have**, listed below. But you can also create your own local fields.

Important Statewide (Enterprise) Feedback Fields
- **Description:** **Always** include this Feedback Field, by checking the box for Description. This is where the volunteer will freeform enter what they did. When selected for your Activity, it becomes a required field.
- **Direct and Indirect Contacts:** If it is an activity where the volunteer may be educating the public or other VMNs, then **always** check the boxes to include Direct Contacts and Indirect Contacts. We need to know these numbers for our Civil Rights reporting obligations. If selected, these fields both become required, but a volunteer could enter "0". There is a detailed explanation for this field in the Info box.
- **Impact:** This field is optional but important and highly recommended for all Activities. It provides an opportunity to capture the volunteer's view of the impacts of their work, which then can be shared with partners and sponsoring agencies, and in your VCE program's Annual Report. A volunteer could add an anecdote, evaluation data, or other description here.

To Create a New Local Feedback Field:
1. Move to the bottom of this section and click on "Add New."
2. In the box that pops up, give it a name for easy sorting on reports. You may want a more descriptive name for what the volunteer will see.
3. **Make sure the box that says the field "will be displayed for hours logging" by a volunteer is checked if this is an Activity to which they can report hours. (Most of them.)**
4. Here is also where you will decide if you want to make it mandatory or optional for the volunteer to fill in, checking the box there accordingly.
5. The Feedback Field description is helpful and will be able to be read when a volunteer clicks on the 'i' (info) button next to that field. *E.g., this may help explain to them what kind of info you want them to fill in or why it's important to do so.*
6. Make sure to save once completed.

Suggested Local Feedback Fields
Depending on the Activity and what reports you want to create, there might be information that you would like feedback on for your area, perhaps to share with the partner that your chapter/unit is helping.
- **Locations:** We suggest that you **create two Feedback Fields** to track where volunteers are doing their work. You can use these data in reports to find the number of hours done in different localities or the number of different sites where volunteers worked. **TIP:** A dropdown list will be more powerful here for reporting purposes than an open text field because volunteers might write locations in different ways, making it hard to search or sort the data.
  1. **Location – Locality:** Create a dropdown list of choices that covers the counties and independent cities where your projects take place.
  2. **Location – Specific Place/Site:** Create a dropdown list of choices that covers the parks, schools, and other sites where your particular project takes place. If you begin doing the same activity at a new location, you can simply edit this Feedback Field to capture

that new site, rather than having to create an entirely new Activity (unless you have other reasons to do so.)

NOTE: For the VMN program, if some of the sites are on lands managed by our sponsoring agencies, label them that way. That will help you total up hours with state sponsors for reports. For example, if you have a Category of Bird Monitoring, under which is an Activity for Bluebird Monitoring, use the Site field to pre-list the locations, and if one of them is a DCR state park, DCR Natural Area, DOF State Forest, DWR Wildlife Management Area, Virginia Museum of Natural History property, or VIMS property, then make sure to label it that way *(e.g., First Landing DCR State Park.)* It really helps if you include the acronym, such as DCR or DWR in the site name, for consistency.

- **Any other information you want to collect locally!**

> **TIPS**
> - Should you want to change the wording or choices on a Feedback Field that the chapter/unit already created, go to the CONFIG icon > Activities and click on Feedback Fields in that menu. Hover over the little 'notebook' on the left of the field and choose Edit. (You won't be able to edit any that were Enterprise-level created.)
> - Here you can also view all Activities which already have that field associated with it.
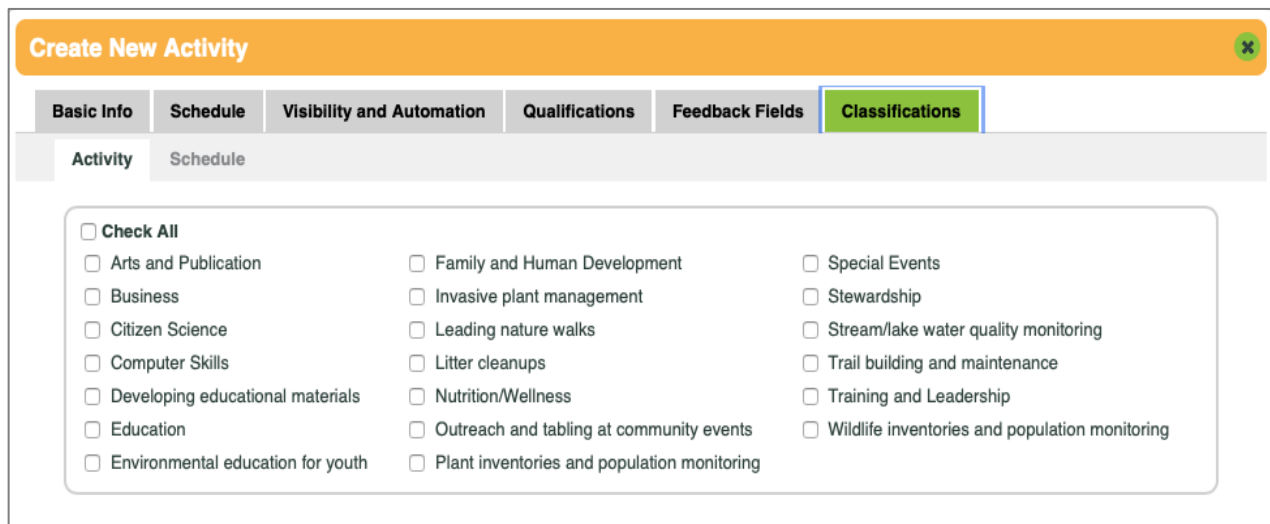
Tab 6: Classifications

Figure 10: Tab 6 – Classifications section

You can apply two types of Classifications to the Activity.
- **Activity Classification:** You can choose more than one Activity Classification for each Activity.

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- **Schedule Classification**: This Classification lists when an Activity 'generally occurs.' **It is important to fill this area in whenever possible.** By adding all possible days/times, it will allow volunteers who are generally available at certain times to find Activities that fit their schedules, and it will help you find volunteers for those Activities. (Remember, specific scheduled shifts are under the Schedule tab.)

  For example:

  > A volunteer has Monday free and wonders what is going on that they could volunteer for. If Monday is one of the days checked in this section for an Activity, it would appear in their Opportunity search if they filtered by this day of the week.

  For additional help, watch the video at:
  https://www.betterimpact.com/volunteerimpacthelp/help-articles/relationship-between-schedule-classification-and-general-availability/.

Tab 7: Notifications

Figure 11: Tab 7 – Notifications section

On this tab, choose Administrators to be notified for this Activity. If you would like someone to receive notifications when someone signs up for or withdraws from the Activity, select those individuals here. This is a two-step process. To get the notifications, **each of those selected here must also have turned on the preference to receive notifications in their individual Administrator profiles.** *(See TIP box, below.)* Only Administrators can receive these notifications, but you can create unlimited Limited Administrators whose main functions are to manage specific Activities, *e.g., your Project Leaders/Coordinators.* VCE being an Enterprise Plus client, you can choose which specific notifications you get.

ONCE YOU HAVE CREATED YOUR ACTIVITY

Editing Your Activities in Bulk

If you want to make the same edits to several Activities you've already created, you can do this very easily in bulk, for most fields.
1. Go to CONFIG icon → Activities menu → Bulk Activity Updates in left-hand menu.
2. Click on the Filter Activities button. Select all the activities you want to make a specific change to.
3. At bottom of the Activity list that appears, click on dropdown menu labeled "Change Selected". Choose what it is you want to change in bulk, then fill in the boxes that appear and press green button to save changes.

Copying an Activity to Create a New One

You can use the same settings you already made to one Activity to more easily create a new one. Even if you want to change a few settings, you might want to use this helpful 'copy' feature, then edit the new Activity.
1. Go to CONFIG icon → Manage Activities
2. In the Activity list that appears, hover over the little 'notebook' next to the one you want to copy, then choose Copy.
3. Give it a new name, choose if you want the same Qualifications, Feedback Fields, and/or Classifications etc., and press "Copy Activity."
4. Now go back into that new Activity, review, and edit the few things you need to. (Make especially sure you have the correct Report Group and Category chosen for the new Activity.) (Hover over the 'notebook' and press Edit.)
   More on this on BI help page https://support.betterimpact.com/volunteerimpacthelp/help-articles/copy-activity/

ADDITIONAL TIPS ABOUT ACTIVITIES

When in the Manage Activity section:
- Choose a larger number for the Page Size filter to see more of your chapter/unit activity list at one time.
- For the Status filter to show all your Activities (both Active and Inactive), choose "do not filter." NOTE: If you feel you are missing some Activity listings, this may be the reason if some were marked as Inactive.

- BI allows for volunteers to sign up for scheduled Activities. This can be a benefit for all involved since it gives both the volunteer and Administrators tools to use to encourage involvement and communication. The thing to remember is there may be some people who don't use that button, such is the nature of our volunteering, so you will want to still make sure any pertinent details are shared with everyone in the chapter/unit.

DISABLING THE SIGN-UP BUTTON IN A BETTER IMPACT ACTIVITY

As mentioned earlier, there are times when you may not want volunteers to use the Better Impact sign-up button for Activities, such as for those which require registration with a different organization and thus, may be confusing for the volunteer. (NOTE: Even if registering with an outside organization, you may still want the volunteer to sign up on BI-VMS as well so that Admins and volunteers can both use the BI-VMS tools available to them when they do. If so, you will want to be very clear about where they should register.)

While BI-VMS doesn't have a direct way to disable this button, there are a few workarounds:
- **If the Activity is labeled as a scheduled Type in BI-VMS, one that has dates/times associated with it** *(i.e., One time, Reoccurring, Disjointed):*
    1. Checkmark and fill in the setting on the Visibility and Automation tab called "cut off sign-up for shifts of this activity xxx hours before the shift begins." If you fill in the hour amount to be long before the Activity starts (such as 300 hours), it no longer allows anyone to sign-up for it.
    2. You will then need to also uncheck the "Allow volunteers to add themselves to the backup list" on the Basic Info tab so that volunteers don't click on that instead.

    See more on BI help pages: https://www.betterimpact.com/volunteerimpacthelp/help-articles/self-removal-and-cutting-off-sign-ups/

- **If the Activity is an unscheduled Type of activity in BI, one with no specific dates/times** *(i.e. Seasonal, Unscheduled):*
    You will not get the option to "cut off sign-ups" when creating this Activity. The sign-up button will show up and be active. Two things you can do, one which is important for all these Types of activities, regardless:
    1. Add a bold note to the Pre-assigned Description box about not using the sign-up button.
    2. A workaround: Checkmark (on the Visibility and Automation tab) the Auto Lock box and set it at max = 1. Then assign **yourself** to this Activity so the sign-up button no longer appears. **Note:** This does generate a text that says, "This activity is full." Thus, if you use this procedure, you will want to make sure to say in the description box to ignore the "full" message.
    3. You will then need to also uncheck the "Allow volunteers to add themselves to the backup list" on the Basic Info tab so that volunteers don't click on that instead.

HOW TO CREATE A LIST OF ALL ACTIVITIES (for Project Chairs and VMS Administrators)

This isn't an obvious method, and it will take a bit of editing once you've exported it as an excel doc, but it does give you a list of all your Activities. This is also the way you can see if you have any Activities

missing their Activity Report Groups listing. (It's very important that they are all related to a Report Group.)

1. Click on REPORTS icon, then Schedule Reports menu → Schedule Summary Raw Data
2. Make sure filters are set for:
    a. All Activity Types, and
    b. "Don't filter" for BOTH Category and Activity Statuses (so you get all Activities in your list)
3. Columns to include: Uncheck all but those ones already checked under Activity Fields, unless there are others you'd like to have.
4. Then "view" or "export" the Schedule Summary.