



### COURSE TYPE

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- » Technology

### MODALITY

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- » Instructor-Led Event

### DURATION

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- » 1.5 Hours

### DELIVERY METHOD

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- » Online
- » Onsite

### PREREQUISITES

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- » Blackbaud CRM: Overview
- » Blackbaud CRM: Core Principles 1
- » Blackbaud CRM: Core Principles 2

### COURSE OVERVIEW

Volunteers play an integral role in supporting the mission of your organization. Blackbaud CRM has the functionality to organize, capture, and monitor volunteer engagement for your organization. In this course, learn how to create, manage, and report on your volunteer staff.

### TARGET AUDIENCE

This course is designed for those responsible for managing volunteers such as Event Coordinators and Volunteer Managers. Novice users involved with entering, updating, and reporting data on volunteer involvement will benefit from this course.

### LEARNING OBJECTIVES

- Describe and create screening plans
- Describe and configure skill levels
- Describe and set up volunteer types
- Configure and add a volunteer award
- Add a volunteer record
- Search for a volunteer record
- Navigate the tabs on a volunteer record
- Add volunteer types, traits, and availability to a volunteer record
- Manage screening plans and expiring traits
- Add a volunteer job
- Add traits and occurrences to a job
- Assign volunteers to jobs
- Identify volunteer reports
- Generate a Volunteer Schedules report for a volunteer

### VIEW ADDITIONAL INFORMATION

- [Registration information](#)
- [Blackbaud University policies](#)
- [View the complete curriculum for Blackbaud CRM](#)