



*We are CiviCRM experts*

## HelpConnect

A volunteer opportunities portal



# **cividesk**

*We are CiviCRM experts*



## **12+ years serving nonprofits**

Cividesk was founded on the premise that CiviCRM users need on-going services to fully realize CiviCRM's potential.



## **2,500+ code contributions**

We are proud supporters of the CiviCRM community, and we actively contribute to the project.

[cividesk.ca](http://cividesk.ca)

Montreal, QC, Canada

[cividesk.com](http://cividesk.com)

Denver, CO, USA



# A Little Help

*A Colorado non-profit that connects volunteers with their senior neighbors to help them thrive and age well in their homes*



- 3,500 background checked volunteers
- 1,800 older adults across the state
- 8,000 services per year

- Services provided:
  - Transportation, yard work, snow shoveling, care calls/visits, errands, grocery shopping, technology help, ...
- SnowMatch and Service Saturday programs
- Intergenerational activities
  - Social and educational events

# Journey with CiviCRM

2017

*CiviCRM successfully integrated in their daily operations*

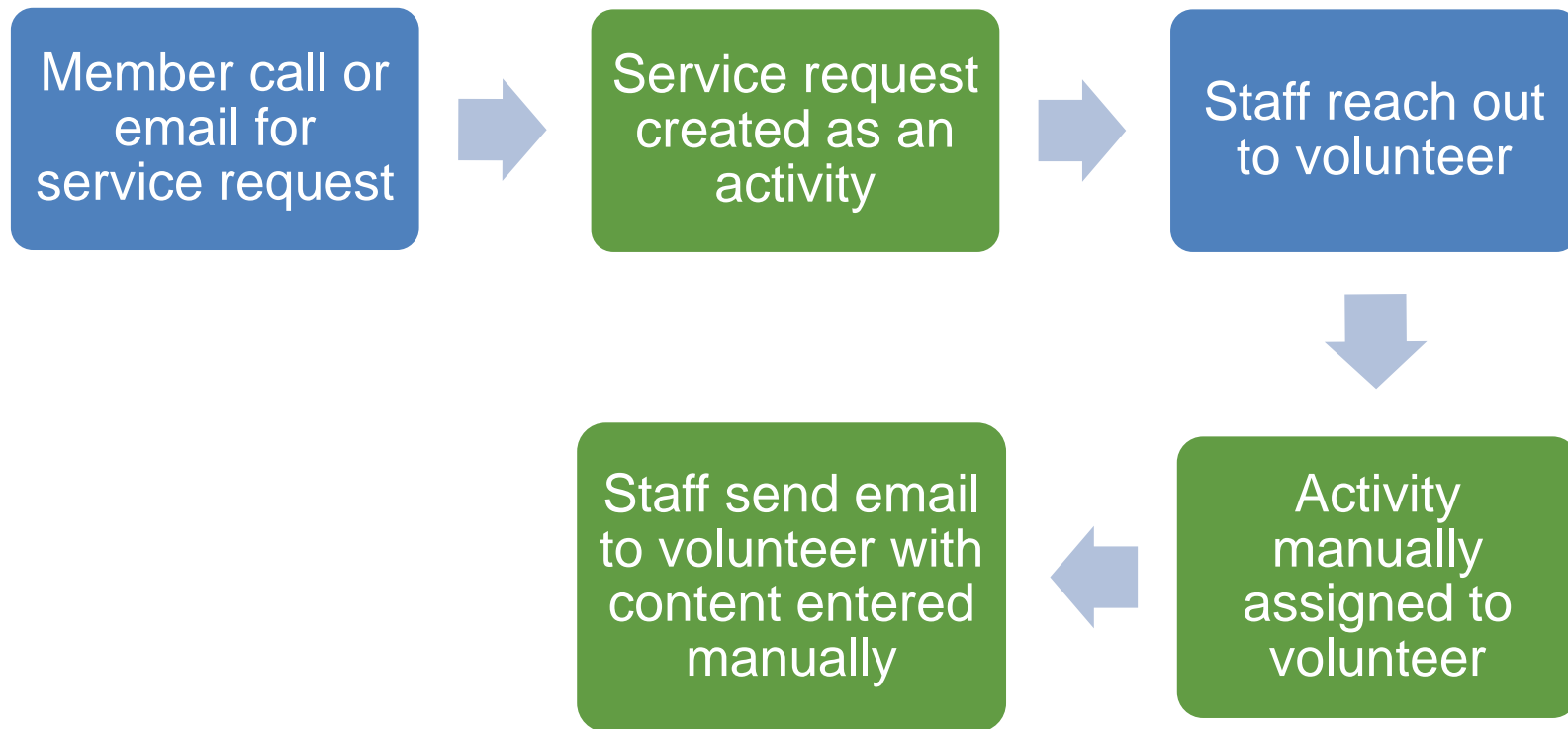


- Contacts (volunteers, members, corporations,...)
- Contact Layout extension
- Activities (service requests)
- Emailing
- Membership (older adults)
- Fundraising
- Events (volunteer chats, volunteer trainings, fundraiser event,...)
- Volunteer application (Drupal webform)
- Older adult member application (Drupal webform)



# Workflow before HelpConnect

*Service requests are managed in CiviCRM with activities  
but manually assigned to volunteers*



In CiviCRM

# Journey with CiviCRM

2020

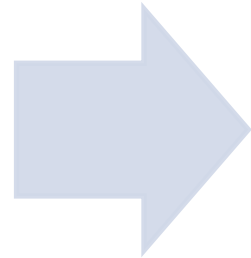
*Launch of the self-service volunteer portal HelpConnect*





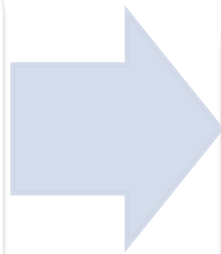
# New workflow with HelpConnect

Member call or email for service request



- Service request manually created as an activity on the member's contact with status=scheduled
- Member's address and phone automatically copied over to the activity

Volunteer logs in in HelpConnect \*, browse service opportunities and accepts a service request



Activity assigned to volunteer

Email sent automatically to volunteer with member's information

Activity is removed from the list

\* Only background checked volunteers can login



# HelpConnect

**Activity Type**  
Ride  
Errands  
Outdoor Help  
Indoor Help  
Technology Help  
Care Visits  
Pet Care  
Event Outreach/Tabling  
Office Work

**City**  
  
ex: Fort Collins

**ZIP Code**

<b>Barbara Bertone</b> needs: <i>Indoor Help</i>	<input type="button" value="accept request"/>
When: Flexible Date and Time Where to: Member's Home Request: Handy Help - Install Light Fixture with Fan <a href="#">View details...</a>	
<b>Ralph Youmans</b> needs: <i>Indoor Help</i>	<input type="button" value="accept request"/>
Where to: Member Home Request: Installing Front Door <a href="#">View details...</a>	
<b>Margaret Redding</b> needs: <i>Ride</i>	<input type="button" value="accept request"/>
When: Flexible Date and Time Where to: City Market at 12th and Patterson in Grand Junction Request: Ride to and from Supermarket <a href="#">View details...</a>	
<b>Leann Chamberlain</b> needs: <i>Indoor Help</i>	<input type="button" value="accept request"/>
When: Flexible Day and Time Where to: Members Home Request: Handy Help Sanding Down Doors <a href="#">View details...</a>	
<b>Burry- Wally and Virginia Walker-Burry</b> needs: <i>Outdoor Help</i>	<input type="button" value="accept request"/>
When: Flexible Date and Time Where to: Member's Home Request: Yard Work <a href="#">View details...</a>	

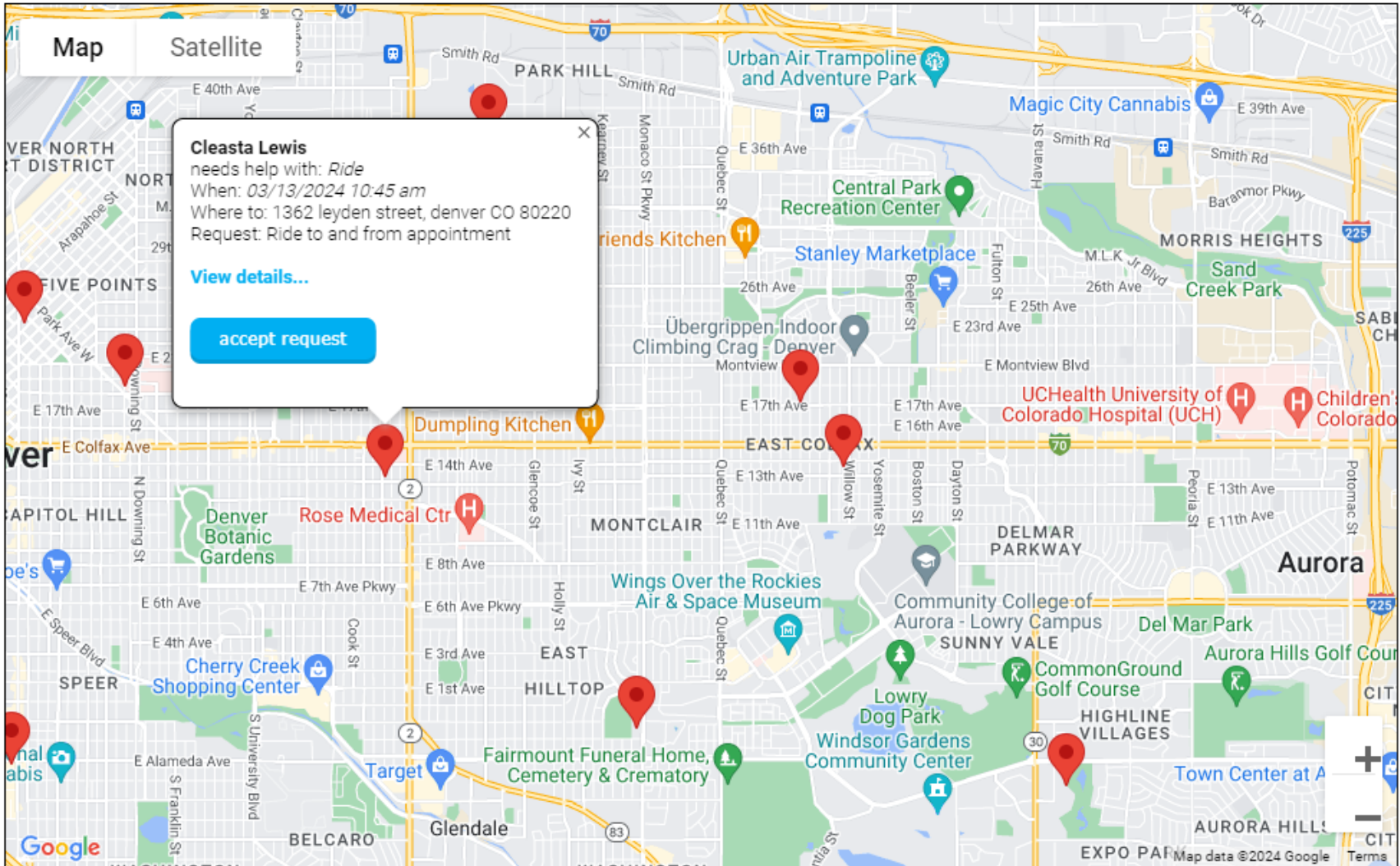


### Activity Type

- Ride
- Errands
- Outdoor Help
- Indoor Help
- Technology Help
- Care Visits
- Pet Care
- Event Outreach/Tabling
- Office Work

search

reset



The map shows a geographic area in Denver, Colorado, including neighborhoods like Park Hill, Five Points, Montclair, Hilltop, and Aurora. A popup window is open over a red location pin in the Park Hill area. The popup contains the following text:

**Cleasta Lewis**  
needs help with: *Ride*  
When: *03/13/2024 10:45 am*  
Where to: *1362 leyden street, denver CO 80220*  
Request: *Ride to and from appointment*

Below the text are two buttons: "View details..." and "accept request". The map interface includes a "Map" and "Satellite" toggle at the top left, and a Google logo at the bottom left. The bottom right corner shows "Map data ©2024 Google" and "Terms".



## Activity details

**Burry- Wally and Virginia Walker-Burry** needs: *Outdoor Help*

**When:** Flexible Date and Time

**Where to:** Member's Home

**Request:** Yard Work

**Details:**

Virginia is hoping to find a group of 3-4 people to help rake leaves in her yard and also clean her gutters. She has a lot of leaves. She will provide the bags and has a leaf blower, but if the volunteers could bring rakes, that would be great. Please contact her if you are interested in this volunteer opportunity. Thank you!

**Duration:** 120 minutes

accept request

[Go back to volunteer opportunities](#)



## Activity details

**Shirley Chimes** needs: *Ride*

**When:** Wednesday March 6, 2024 at 10:30 am

**Where to:** 5790 W. 44th Avenue in Denver

**Request:** Ride to and From Eye Appointment

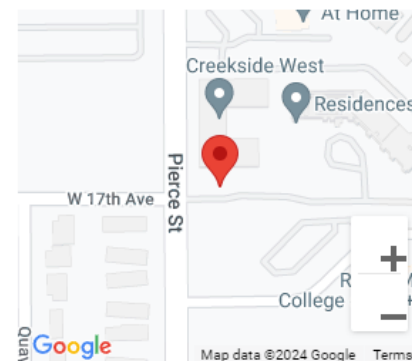
**Details:**

Please contact Shirley if you can give her a ride back and forth to a short eye appointment. It is a follow up to her cataract surgery the day before. Thank you!

**Duration:** 90 minutes

accept request

[Go back to volunteer opportunities](#)



✓ You have accepted this volunteer opportunity. ✕

## Assignment confirmation

**Isabel Martinez** needs: *Outdoor Help*

Contact Location: 3057 N. Josephine Street, Denver, CO 80205, United States

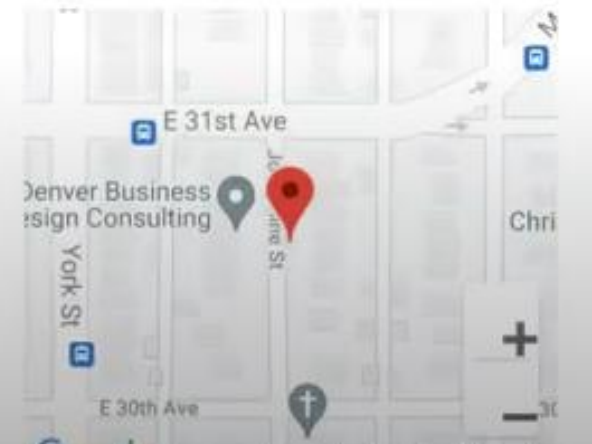
Phone Number: 303-940-9447

**Request:** Haul away lattice/fence posts-flexible

**Details:**

Please contact Isabel if you are able to haul away some fence pieces and lattice from her yard. Thank you!

**Duration:** 120 minutes





# Implementation



- Drupal views with filters
  - Javascript and PHP custom code
  - Drupal Gmap and Gmap fields modules
  - Drupal webform and Webform CiviCRM Integration modules
  - Drupal CiviGroup Roles Sync and CiviMember Roles Sync modules
- CiviCRM activities
  - CiviRules extension
  - Custom development



# Custom development in CiviCRM

- Member location on the activity calculated automatically with a built-in approximation
- Workflow dates
- Workflow activity status
- Customized reminder emails sent to volunteer
- Assignment email with member's data
- A lot of custom reports



# HelpConnect Offsprings



Shovel on location:  Snow blower on location:

Map | Satellite

**Cheri Talbot**  
Areas to shovel: Front yard walk, Side yard walk  
House has a snow shovel: No  
House has a snow blower: No

# Challenges



- Tracking volunteer time when work done is more than what was noted on original activity request
- Volunteer provides service directly to the member
- Maintaining level of volunteers engagement and involvement
- Changing volunteers demography
- Automating members requests intake
- Keeping member's information updated

# That's just the beginning



- Volunteer Dashboard
- Sending SMS and emails to volunteers with service requests based on their home address
- Development of a mobile app
- Member Portal
- Warm Welcome Care visits





# Warm Welcome Care Visits

- From a tablet, volunteer access a form about member
- Fill out additional information such as physical health, mental health, living environment
- When warm welcome is done over the phone, volunteer access member's contact via a link with a checksum

✓ You are filling out this Warm Welcome form to assess the physical and living conditions of our new older adult member: ✕

This is a Warm Welcome assessment for:

**First Name \*** Betty

**Last Name \*** Zahakis

**Street Address** 2421 Sheffield Circle East

**Address line 2**

**City** Fort Collins

**Phone Number** (970) 231-8959

If any of the information above is not correct, please contact Emma ([emma@alittlehelp.org](mailto:emma@alittlehelp.org)) to provide a correction.

✓ Now, please verify the information provided below, and update where necessary. ✕

Physical Health

Mobility

Does the member have mobility issues?  Yes  No

Vision

Does the member have vision issues?  Yes  No

Hearing

Does the member have hearing issues?  Yes  No

Other

Is the member on oxygen support?  Yes  No

***cividesk***

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