Team Lead Instructions

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Designating a Team Lead

https://engage.isaca.org/communityday/about

- **ONE** Team Lead is identified by the participating chapter as the point person to coordinate local activities and communicate with ISACA Global.

- Team Leads may apply at https://engage.isaca.org or the chapter president can email volunteer@isaca.org with the name and email address of the Team Lead.

- Once a chapter designates a Team Lead, a US$200 bonus will be added to the chapter's existing marketing assistance funds for the chapters to purchase t-shirts or other CommunITy Day marketing materials.

- Please allow up to a week for ISACA Global to add the funds to your balance.

- If needed, the Team Lead may elevate select chapter participants to have admin rights in Helper Helper and assist with local coordination efforts.

All participants must sign up and validate their activity via the Helper Helper app.

Team Leads must create an account prior to ISACA Global elevating their admin access.

Create an account or log in to your previous account: https://engage.isaca.org/communityday/about

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Team Lead Responsibilities

- The Team Lead is responsible for:

- Acting as the point person for communications from ISACA Global and disseminating information to local participants as needed.

- Elevating admin access for local admins to manage individual opportunities (if needed).

- Coordinating t-shirt orders with those from your respective chapter who have access to the Marketing Storefront to ensure timely delivery.

- Coordinating distribution of t-shirts to participants.

- Ensuring that all participants validate their time after the event in order to be calculated in the global statistics.

- Responding to participant's needs. Inquiries that come to ISACA Global will be filtered to the appropriate Team Lead for response.

- Ensuring that photos are shared on social media using #ISACACommunITyDay and submitted to ISACA Global afterwards.

CPE ELIGIBILITY:

The Team Lead role is a Global Volunteer position.

Appointees may claim up to 5 CPE hours for time served pre- and post-event.

Time spent volunteering DURING CommunITy Day DOES NOT COUNT toward CPE.

Other local admin roles are not CPE-eligible.

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Log in to Helper Helper account

Sign up tool for participants

- Helper Helper can be accessed via mobile app or web browser. All participants must create an account (or use an account created from a previous CommunITy Day activity).

  - https://app.helperhelper.com/signup/732?show=team

- Admin access to Helper Helper is not available through the mobile app; it must be viewed in a browser.

  - https://admin.helperhelper.com

Login to Helper Helper Admin Account

1) visit admin.helperhelper.com
2) request a password if you have not received one from info@helperhelper.com

2) enter your username and password (this is the same username and password you use to access the Helper Helper app)

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Create opportunities

https://admin.helperhelper.com

1. Login to admin.helperhelper.com.

2. Click "Opportunities."

3. Click "Add Opportunity."

4. If it has not already been added, add the Organization (under your chapter header) with which you are volunteering.

5. Assign the opportunity(ies) to that organization.

HINT: Creating opportunities

- ***"Organization" vs "Opportunity"***
  - *Activities organized with an established charity/organization (i.e. donating blood with the Red Cross) should add "Red Cross" as the Organization and the blood drive as the Opportunity.*
  - *For activities independently organized (e.g. group beach clean up), add the chapter as the Organization and the beach clean up details as the Opportunity.*
  - *When you log in you will see all organizations available to your region. Please ensure you are selecting the correct organization.*
  - *Ensure that the contact information for the organization is correct. Information may be carried over from previous years.*

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Create opportunities

https://admin.helperhelper.com

6. Complete required fields.

7. Start date = Date of ISACA CommunITy Day (i.e., first Saturday in October)

   • Click "Time Slot Options" to define details and limitations of the opportunity.

8. Coordinator should be the chapter contact person or individual to whom inquiries should be directed.

9. Additional Settings:

   • The opportunity should be viewable by your chapter only ("team").

   • Check the box that no validation key is needed. (This is a secondary verification of hours, which ISACA will **not** do.)

   • Options: If the opportunity allows for chapter members to bring family/friends, check the box to allow participants to bring additional attendees to register and track their participation.

10. Click "Save Opportunity" to publish it to your members.

Adding other admins

https://admin.helperhelper.com

To assign other local chapter admins (i.e., give additional individuals the ability to add and manage opportunities):

1. Click "Volunteers."

2. If the person has a Helper Helper (HH) account, click "Edit > Edit Profile." (If they do not have an HH account, click "Add Volunteer.")

3. Select "Team Admin" under "Institution Role."

4. Select your chapter name under "Admin of Teams."

This person will then be able to add, edit, and track volunteers and opportunities for ISACA CommunITy Day.

The chapter's Team Lead will receive any communications from ISACA Global about the event and is expected to disseminate it as appropriate to any other opportunity admins.

Managing your opportunities

https://admin.helperhelper.com

View Opportunity

3 EDIT OPPORTUNITY | COPY | DELETE

APP PREVIEW

OPPORTUNITY TITLE	ATTACHED TO ORGANIZATION
home kits	Journeys	The Road Home
OPPORTUNITY CAUSE	OPPORTUNITY CATEGORY
Journeys	The Road Home	Human Services

OPPORTUNITY DESCRIPTION
Create welcome home kits

OPPORTUNITY TIME
Wednesday, June 19, 2019
8:00am to 9:00am CDT   1 🖾   1h 00m   DETAILS

OPPORTUNITY LOCATION	OPPORTUNITY COORDINATOR
The Hope Center	Melissa Swartz
1140 E. Northwest Hwy	mswartz@isaca.org
Palatine, IL 60074	847-660-5598
USA	

VIEWABLE BY
ISACA Staff
/ All teams in branch

VALIDATION KEY	STATUS
[Not Needed]	ACTIVE

COORDINATOR CHECK-IN LINK
https://app.helperhelper.com/admin/checkin/112291/uesstaxz
⚠ Anyone you share the coordinator check-in link with may add and validate commitments for this opportunity.

AUTOMATED REMINDERS
Default volunteer and coordinator reminders will be sent.   **4** CUSTOMIZE

Commitments

ADD TEAM | ADD USERS

VOLUNTEER ▾	TEAMS	DATE AND DURATION	ATTENDED
5 Swartz, Melissa	ISACA Staff	8:00 AM CDT	1h 00m ✎
mswartz@isaca.org		on Jun 19, 2019 for 1h 00m	

6 VOLUNTEER EMAIL LIST

App Preview

ISACA COMMUNITY DAY
PEOPLE | SERVICE | PURPOSE

Opportunity Details

JOURNEYS | THE ROAD HOME
home kits

June 19, 2019   WEDNESDAY

○ 8:00 AM - 9:00 AM   SIGN UP
  👥 1

DESCRIPTION
Create welcome home kits

LOCATION
View larger map — JOURNEYS | The Road Home — Luthe
Google — Map data ©2019 Terms of Use Report a map error

The Hope Center
1140 E. Northwest Hwy
Palatine, IL 60074
USA

COORDINATOR
Melissa Swartz
mswartz@isaca.org
847-660-5598

Helper Helper — ISACA

Melissa Swartz (Branch Admin) ⌄ | ❓ Help | Sign out ⮕

| Home | Volunteers | Teams | Organizations | Opportunities | Reports |

Opportunities

VOLUNTEER ADDED | ADD OPPORTUNITY | SEARCH ▸ | FILTER: Past **All** Future ☐ hide empty opportunities

1 ↑

OPPORTUNITY	COMMITMENTS	DATE AND DURATION ▲	ORGANIZATION / CATEGORY	
home kits [ISACA Staff]	1	Sunday, June 30, 2019 at 8:00 AM CDT for 1h 00m	Journeys	The Road Ho… Human Services	📄 **2**
Seed Packing [ISACA Staff]	0	Saturday, October 5, 2019 at 9:00 AM CDT for 2h 00m	Feed My Starving Childr… Human Services	📄

DOWNLOAD

To manage your chapter's opportunities:

1. Click "Opportunities."

2. Click the "Edit" button next to the selected opportunity.

3. Click "Edit Opportunity" to make changes to the opportunity details.

4. Set automatic reminders to be sent via SMS ("push") or email. Admins can also schedule and customize a message to be sent in their local language by clicking "Customize."

5. Ensure all committed volunteers are listed under "Commitments." If a participant has not registered but has a HH account, click "Add Users" to track their participation.

6. To email all registrants with final event details (e.g., event reminder, location, what to bring, thank you, etc.) click "Volunteer Email List" and paste the distribution list in your email program of choice (BCC recommended).

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Organizing a Successful ISACA CommunITy Day

https://engage.isaca.org/communityday

- Abide by local guidelines for COVID-19 and research virtual or outdoor activities if possible.

- Remind all participants to post photos and videos on all their social media outlets using #ISACACommunITyDay. All posts using that hashtag will pull into the social media feed on https://engage.isaca.org/communityday/impact so ISACA can celebrate its service-minded members.

- Upload photos of your activity(ies) in your Helper Helper account when you track your time so ISACA can feature your great work in future publications and communications.

- Confirm (afterward) all participant's hours have been validated in Helper Helper to ensure inclusion in the global statistics.

- Be mindful of deadlines related to ordering t-shirts and printing materials.

- Check out the admin toolkit for project ideas, communication templates, local waivers, promotional tools, and more!

- https://engage.isaca.org/communityday/communitydayadmins

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CommunITy Day T-Shirts

Order early to ensure you receive your delivery!

- Once a chapter has designated a Team Lead, ISACA will issue a **bonus US $200** to the chapter's marketing assistance program (MAP) balance to purchase t-shirts via the Marketing Storefront.
  - Please allow up to 1 week for the funds to be added to the MAP balance.
  - You can access the Marketing Storefront link by logging into the chapter leader portal: https://leaders.isaca.org.

- Only MAP contacts designated by the chapter board may log into the chapter storefront and purchase products. It is the Team Lead's responsibility to coordinate this effort with the chapter's MAP contact(s).

- Chapters may use the MAP funds toward any products in the chapter storefront. Costs exceeding the available balance are the chapter's responsibility. This includes taxes, shipping, duties, and customs.

- It is the Team Lead's responsibility to coordinate with participants and other local admins on the collective order and the distribution of the t-shirts.

- If chapters choose to print t-shirts locally—or if individuals purchase t-shirts from isaca.org—ISACA will **not** reimburse those expenses. Only purchases made via the chapter marketing storefront are eligible for the MAP funds.

- No significant design changes from the 2019 t-shirt means past participants may not need a new shirt.
 * Note: Inventory may be mixed between the new and old ISACA logos that appear on the back.

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Tracking participation – for volunteers

https://app.helperhelper.com

Volunteers should track their own hours after they participate.

1. Volunteers should log into the app or https://app.helperhelper.com.

2. Click or tap the opportunity to log time. Enter the start and end time. Click "Submit Attendance Times."

3. The commitment has been included in the global statistics ISACA is tracking for ISACA CommunITy Day!

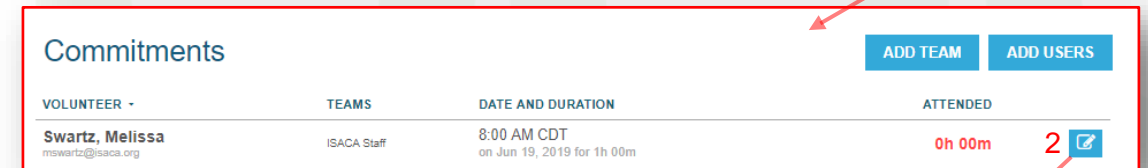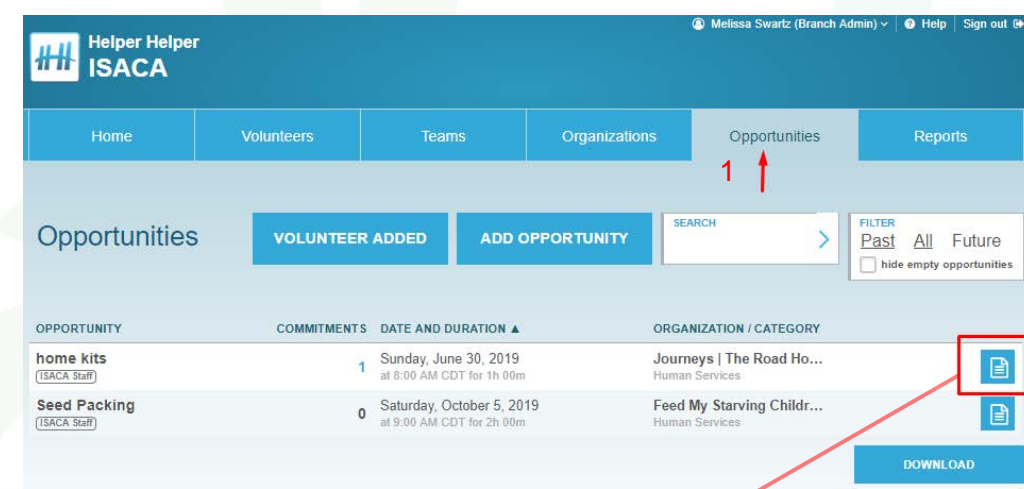CommunITy Day volunteering does not offer CPEs to participants.

Tracking participation

https://admin.helperhelper.com
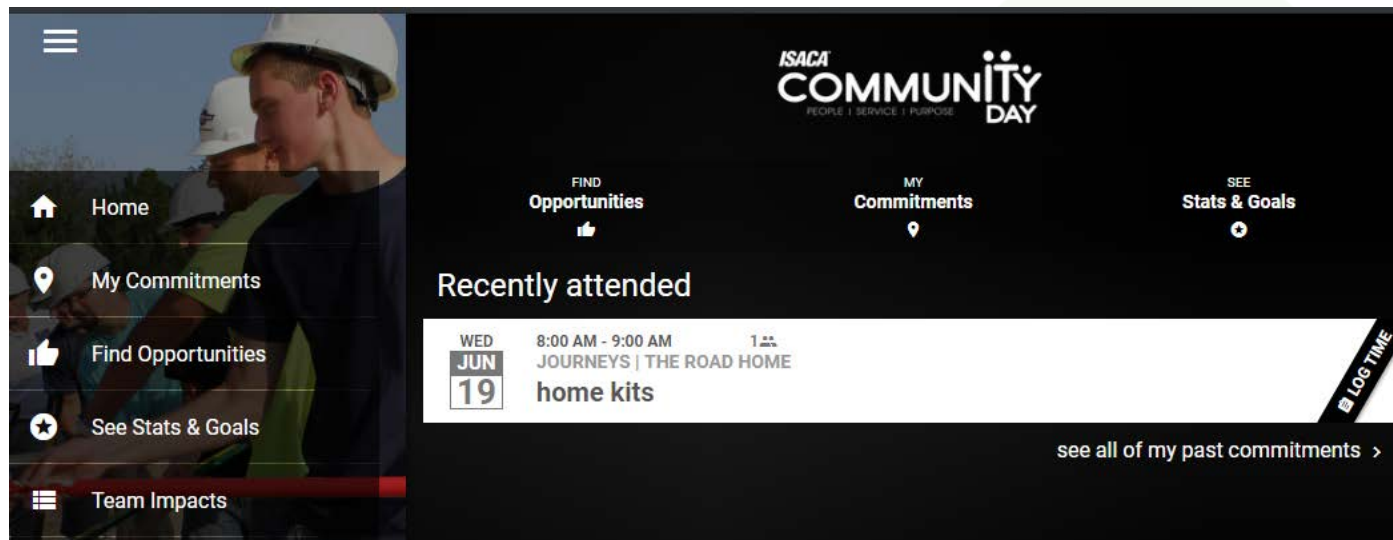
If a volunteer does not log his/her participation, the Team Lead MUST log the hours for those hours to be included in the statistics on ISACA's global impact.

Within 24 hours of the volunteer opportunity, the admin should log in and verify attendance.

1. Click "Opportunities > Edit" (the specific opportunity.) Scroll down to "Commitments."

2. If the text in "Attended" column is red, the time must be validated for each participant; if the time is green, the volunteer has already added it.

3. If the admin must validate the time, click "Edit" next to each person and enter the total amount of time they spent participating. Click "Save Commitment."

Planning for Future CommunITy Days

https://engage.isaca.org/communityday

ISACA CommunITy Day will be the first Saturday in October annually.

Following the close of the annual day of service, Helper Helper admin access will be removed. A few months prior to the event in the following year chapters may designate a new Team Lead, and new opportunities can be added for the next CommunITy Day.

Participants will be able to keep their Helper Helper accounts from year to year. If someone moves and needs to change their chapter ("team/branch") affiliation, contact volunteer@isaca.org.

Maintaining the individual user accounts will allow individuals to see the impact they have made as the program grows. It can also inspire new ways to make the world a better place.

Questions?

Email: volunteer@isaca.org