



## Team Lead Instructions

- Team Lead Responsibilities
- Log in to your account
- Create opportunities
- Add other admins
- Manage your opportunities
- Tips for success
- T-Shirt Orders
- Track participation
- Planning for the future

# 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](mailto: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>



# Team Lead Responsibilities

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

- 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.**

# 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](https://admin.helperhelper.com)
- 2) request a password if you have not received one from [info@helperhelper.com](mailto:info@helperhelper.com)



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

# Create opportunities

<https://admin.helperhelper.com>

1. Login to [admin.helperhelper.com](https://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.

The screenshot shows the Helper Helper ISACA admin interface. The top navigation bar includes links for Home, Volunteers, Teams, Organizations, Opportunities, and Reports. The Opportunities section is active, displaying a table of opportunities. A red arrow labeled '2' points to the 'Opportunities' link in the navigation bar. Another red arrow labeled '3' points to the 'ADD OPPORTUNITY' button. A third red arrow labeled '3' points to the 'DOWNLOAD' button at the bottom right.

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

DOWNLOAD

## 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.*

# 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.

**Add Opportunity** SAVE

ORGANIZATION  
Journeys | The Road Home

WHAT IS THIS OPPORTUNITY?

OPPORTUNITY CAUSE (ORGANIZATION NAME)  
Journeys | The Road Home

OPPORTUNITY CATEGORY  
Human Services

OPPORTUNITY TITLE

OPPORTUNITY DESCRIPTION  
Enter a description of the event

WHEN IS THIS OPPORTUNITY?

START DATE

START TIME  
8:00am

END TIME  
9:00am

**TIME SLOT OPTIONS**

+ ADD MULTIPLE RECURRING DATES  
+ ADD ANOTHER TIME SLOT

OPPORTUNITY TIME ZONE  
America/Chicago (-6; US Central)

WHERE IS IT LOCATED?

LOCATION NAME

STREET ADDRESS  
1140 E. Northwest Hwy

CITY  
Palatine

STATE  
IL

WHO IS THE COORDINATOR?

COORDINATOR NAME  
Melissa Swartz

COORDINATOR EMAIL  
mswartz@isaca.org

ADDITIONAL SETTINGS

VIEWABLE BY  
☒ [ ISACA Staff ]  
☐ [ Select to add additional team ]

VALIDATION KEY  
☒ No validation needed for this opportunity

OPTIONS  
☐ Allow participants to bring additional attendees

NUMBER OF PEOPLE IMPACTED  
0

FUNDS RAISED OR CONTRIBUTED  
0.00

ADDITIONAL NOTES (NOT VIEWABLE BY PARTICIPANTS)

**SAVE OPPORTUNITY**

**APP PREVIEW**

ASACA COMMUNITY DAY  
PEOPLE | SERVICE | PURPOSE

Opportunity Details

JOURNEYS | THE ROAD HOME

DESCRIPTION

LOCATION  
1140 E. Northwest Hwy  
Palatine, IL 60074  
USA

COORDINATOR  
Paige  
p.jacob@journeystheroadhome.org  
12332443456

**7 Edit Time Slot**

START DATE

START TIME  
8:00am

END TIME  
9:00am

END DATE

OPTIONS

☐ Add a name or description to the time slot

☐ Require full time slot commitment

☒ Require a minimum time commitment of 30 minutes (uncheck to customize)

☐ Set a maximum number of volunteers

☐ Set a registration deadline

☐ Divide above timeframe into multiple time slots

**CANCEL** **UPDATE TIME SLOT**

**ISACA**



# 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.

The screenshot displays the Helper Helper ISACA admin interface. At the top, the user is logged in as Melissa Swartz (Branch Admin). The navigation bar includes Home, Volunteers, Teams, Organizations, Opportunities, and Reports. The Volunteers page is active, showing a table of users. A red arrow labeled '1' points to the 'Volunteers' tab. The table lists several users, including Cole, Summer; Moritz, Megan; Swartz, Melissa; Swartz (Attendee), Melissa; and Swartz (Branch Admin), Melissa. A red arrow labeled '2' points to the edit icon for the 'Swartz (Attendee), Melissa' row. Below the table, the 'Edit User' form is shown. A red box highlights the form, and a red arrow labeled '3' points to the 'Institution Role' dropdown, which is set to 'Branch Admin'. Another red arrow labeled '4' points to the 'Admin of Teams' dropdown, which is set to '[ ISACA Staff ]'. The form includes fields for Institution Name, Email Address (Login), First Name, Last Name, Phone, and Other. There are also checkboxes for 'Member of Teams' and 'Admin of Teams', both of which are checked. The 'Status' is set to 'Active'. The 'Timezone' is set to 'America/Chicago (-6; US Central)'. The 'Additional Notes' field is empty. A 'SAVE' button is at the bottom right of the form.

NAME / EMAIL	MEMBER OF	OTHER	COMMITMENTS	TIME VALIDATED
Cole, Summer scole@isaca.org	Branch Admin ISACA Staff		0	0h 00m
Moritz, Megan moritzme@gmail.com	ISACA Staff		0	0h 00m
Swartz, Melissa mswartz@isaca.org	Institution Admin ISACA Staff		1	0h 00m
Swartz (Attendee), Melissa melissaswartz2@gmail.com	ISACA Staff		0	0h 00m
Swartz (Branch Admin), Melissa swartzma2005@gmail.com	Branch Admin ISACA Staff		0	0h 00m

**Edit User**

**INSTITUTION NAME**  
ISACA

**EMAIL ADDRESS (LOGIN)**  
mswartz@isaca.org

**FIRST NAME**  
Melissa

**LAST NAME**  
Swartz (Attendee)

**PHONE (volunteer may supply this)**  
8476605598

**OTHER (graduation year, id number, etc.)**

**MEMBER OF TEAMS**  
☒ [ ISACA Staff ]  
[ Select to add additional team member: ]

**ADMIN OF TEAMS**  
☒ [ ISACA Staff ]  
[ Select to make admin of additional tea: ]

**TIMEZONE**  
America/Chicago (-6; US Central)

**STATUS**  
Active

**INSTITUTION ROLE**  
Branch Admin

**ADDITIONAL NOTES**

**SAVE**



# Managing your opportunities

<https://admin.helperhelper.com>

**View Opportunity**

**3 EDIT OPPORTUNITY** **COPY** **DELETE**

**OPPORTUNITY TITLE**  
home kits

**ATTACHED TO ORGANIZATION**  
Journeys | The Road Home

**OPPORTUNITY CAUSE**  
Journeys | The Road Home

**OPPORTUNITY CATEGORY**  
Human Services

**OPPORTUNITY DESCRIPTION**  
Create welcome home kits

**OPPORTUNITY TIME**  
Wednesday, June 19, 2019  
8:00am to 9:00am CDT

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

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

**VIEWABLE BY**  
ISACA Staff  
/ All teams in branch

**VALIDATION KEY**  
[ Not Needed ]

**COORDINATOR CHECK-IN LINK**  
<https://app.helperhelper.com/admin/checkin/112291/uesstaxz>

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

**4 CUSTOMIZE**

**APP PREVIEW**

**Opportunity Details**

JOURNEYS | THE ROAD HOME  
home kits

June 19, 2019 WEDNESDAY

8:00 AM - 9:00 AM  
1 SIGN UP

**DESCRIPTION**  
Create welcome home kits

**LOCATION**  
View larger map

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

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

**COMMITMENTS**

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

**6 VOLUNTEER EMAIL LIST**

**Helper Helper ISACA**

Home Volunteers Teams Organizations Opportunities Reports

**1**

**Opportunities** **VOLUNTEER ADDED** **ADD OPPORTUNITY** **SEARCH** **FILTER** Past All Future ☐ hide empty opportunities

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
Seed Packing (ISACA Staff)	0	Saturday, October 5, 2019 at 9:00 AM CDT for 2h 00m	Feed My Starving Childr... Human Services

**2**

**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).

# 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>

# 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](https://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.



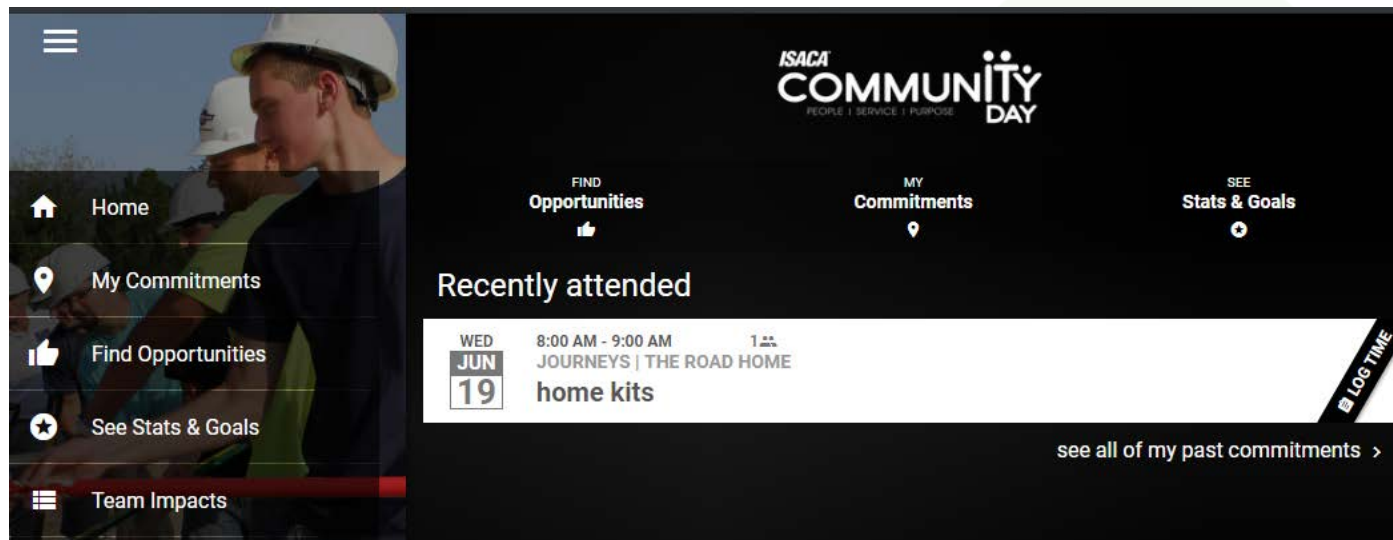
# Tracking participation – for volunteers

<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.



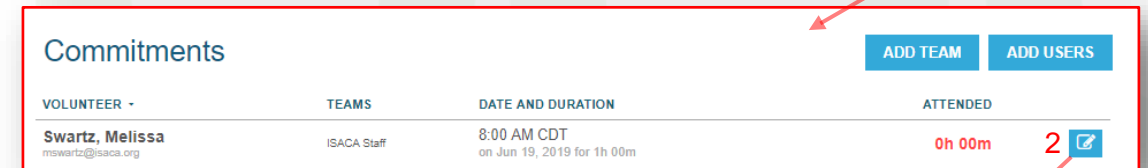
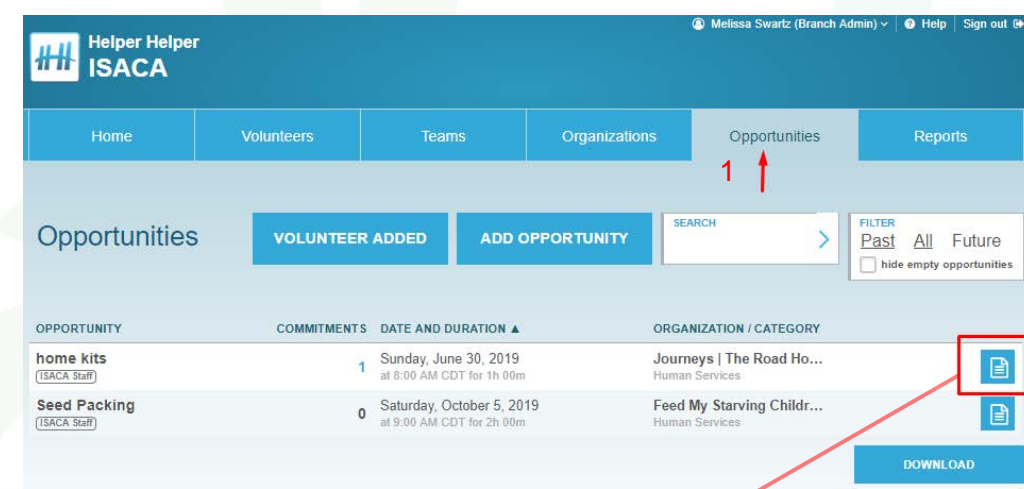
# Tracking participation

<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."



**Edit Commitment**

**VOLUNTEER**  
Melissa Swartz  
mswartz@isaca.org

**OPPORTUNITY**  
home kits

**ORGANIZATION**  
Journeys | The Road Home

**CATEGORY**  
Human Services

**START DATE**  
Jun 19, 2019

**START TIME**  
8:00am CDT

**TIME VALIDATED**  
1 h 00 m

**DONATION**  
\$0.00

**TIME RECORDED**  
0h 00m

**TIME COMMITTED**  
1h 00m

**CHECKED IN**  
Never

**CHECKED OUT**  
Never

**CANCEL** **DELETE COMMITMENT** **SAVE COMMITMENT**

# Planning for Future CommunTy Days

<https://engage.isaca.org/communityday>



ISACA CommunTy 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 CommunTy 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](mailto: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](mailto:volunteer@isaca.org)