

Relay Planning Tool - Volunteer

Relay Planning Tool can be found at <http://rpt.cancer.org>

Step 1: Launch the webpage. Select the **Volunteer** radio button. Next, you will be asked for your **Email**. Enter in the **Email** address where you received the invitation to the tool. Then, enter in the password: **ALLIN2015**

The screenshot shows two login forms side-by-side. The left form is for 'RFL Planning 2014 Login' and the right is for 'RFL Planning 2015 Login'. Both forms have the 'RELAY FOR LIFE American Cancer Society' logo. Each form includes a radio button for 'Volunteer' and 'Staff (AD Login)', a 'Domain' dropdown, 'User Name', and 'Password' fields, and a 'Log In' button. A 'Forgot Password?' link is at the bottom of each form. A green arrow points from the top left to the 2015 form with the text 'Use this one for 2015'.

Select Log In and the dashboard page will open.

Step 2: Once logged in, you will see your event listed at the top of the screen. **Click on the event name** to dive deeper into the event information and goals.

The dashboard has two tabs: 'Events' and 'Reports'. Below the tabs is a table titled 'Your Events at a Glance' with columns for Event Name, Event Date, Gross Raised, and Plan. One event is listed: 'PLOOKLRFL Oklahoma City CY14' on '5/9/2014' with '\$0.00' raised and 'RFL Event Chair' as the plan. To the right is an 'Event Stats' section showing 'Total # Events: 1' and a table with columns for Goal, Actual, and %.

	Goal	Actual	%
Gross	\$200,000.00	\$0.00	0.00%
Net	\$200,000.00	\$0.00	0.00%
Teams	\$55.00	\$0.00	0.00%
Sponsors	\$0.00	\$0.00	0%

Below the table is a button labeled 'View Extended Stats...'. At the bottom of the dashboard is a button labeled 'Select Event Above'.

The event information will populate below this list.

Step 3: Select the appropriate tab below and complete the necessary information **OR** follow the **To Do Tasks** located on the left lower screen. The view's and ability to edit the tabs are dependent on the roles assigned to volunteers within the internal Event Management Tool (EMT).

Event Information Tab

MWWSCXRFL02 Hudson CY15 (Event ID: 10000000124626)

1 Event Information | Non Financial | Financial | Plans | Prospects | Vendors | Comments

2 **Kick Off Date:** [] Save | **Event Date:** 6/19/2015 | **Location:** 1300 Carmichael Rd Hudson, WI 54016-7711

3 **Checklist:**

- Do you have a security plan? Yes No
- Do you have a first-aid plan? Yes No
- Have you verified the details of your site contract? Yes No

4 **Actuals**

Year	Event Name	Date
2015	MWWSCXRFL02 Hudson CY15	6/19/2015
2014	MWWSCXRFL02 Hudson CY14	6/20/2014
2013	MWWSCXRFL02 Hudson CY13	6/21/2013
2012	MW STCRRFL02 FY12	6/22/2012

5 **Current Year Top Teams** | **Current Year Top Members**

Team	\$ Raised
No data to display	

First Name	Last Name	\$ Raised
No data to display		

Prior Year Top Teams | **Prior Year Top Members**

Team	\$ Raised
Team Simon/Dodge	\$8,585.00
Commercial Management	\$4,802.00
Saint Patrick's Prayer Patrol	\$4,270.00
Mt. Zion's Sole to Soul	\$4,082.00

First Name	Last Name	\$ Raised
Lynn	Robson	\$3,100.00
Sandy	Dodge	\$2,100.00
Richard	Ruemmele	\$1,500.00
Chris	Gelina	\$1,150.00

6 **To Do Tasks**

Task

- Make sure you have access to all your events
- Ensure that volunteers set goals by October 15, 2014
- Ensure plans are completed and updated as progress is made
- Meet with supervisor to determine staff negotiated goals by November 30, 2014
- Monitor progress

1. Event specific tabs that contain goals, plans, and contacts
2. Event information pulled from EMT
3. Logistics checklist
4. Historical actuals from previous year's events
5. Top team and individual fundraisers from previous year and current year
6. To Do List with links to tasks to complete

Note:

Look for more updates coming to the Relay Planning Tool in September 2015 including a new "event health assessment/growth planning section" and your current Customer Satisfaction score pdf. Updated Customer Satisfaction score information and comments will be made available later this fall.

Non Financial Tab

Event Information	Non Financial	Financial	Plans	Prospects	Vendors	Comments
	Current Goals (Volunteer)	Current Goals (Staff)	Current Year Actuals	2014	2013	2012
# of Registered People On Teams:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	154	148	151
# New Teams:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	8	7	6
# Returning Teams:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	15	15	16
# Teams:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	23	22	22
# In Kind Sponsors:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	0	0	0
# Registered Survivors:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	21	23	24
# Survivors Engaged On Teams:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	18	19	18
# Survivors Engaged On Committee:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	1	4	2
# of Committees Members:	<input type="text" value="0"/>	<input type="text" value="0"/>	0	13	17	14
# ACS Can Members	<input type="text" value="0"/>	<input type="text" value="0"/>	0	0	0	3
Total # of Participants (all registered in event):	<input type="text" value="0"/>	<input type="text" value="0"/>	0	157	164	165
<input type="button" value="Save Goals"/>		<input type="button" value="Save Goals"/>				
Previous Year Averages						
Team Size						
6.70						

The **Non-Financial tab** is where you can view the previous year's numbers around participants, teams, survivors, and committee members, as well as the current YTD actuals. This is where volunteers and staff will set recruitment goals in those areas depending on their role.

Once your goal is entered, be sure to select **Save Goal**.

Volunteer goals should be in the system by October 15.

Financial Tab

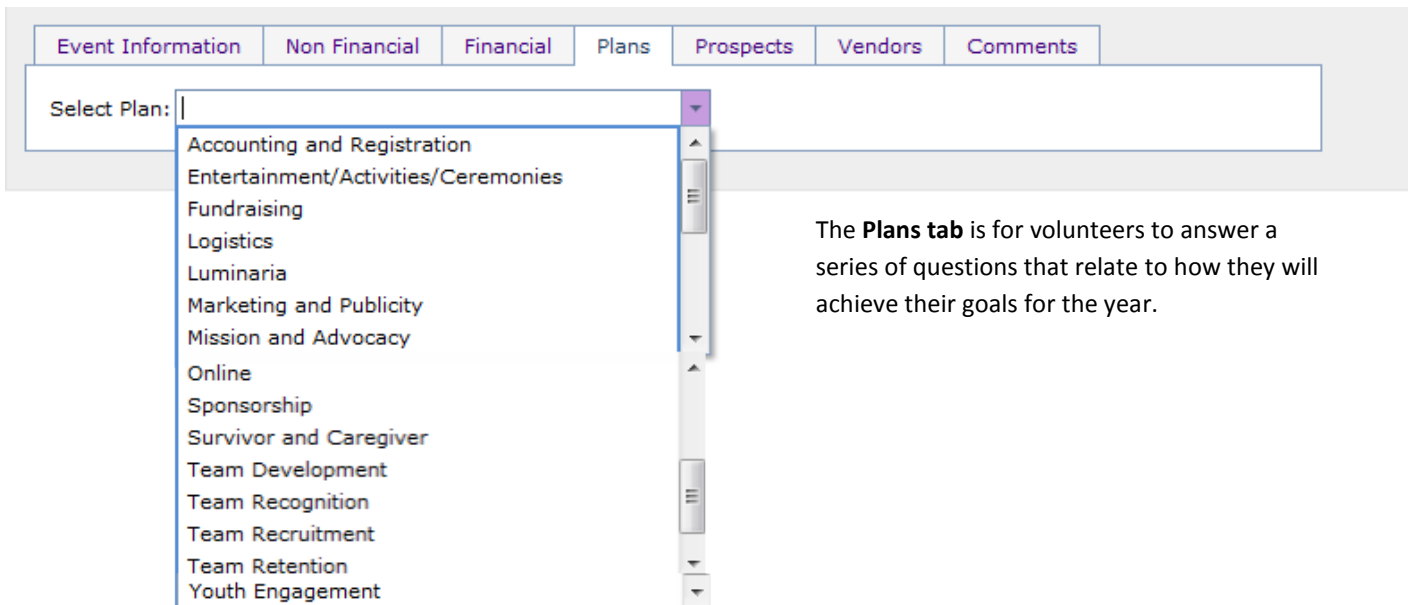
Event Information	Non Financial	Financial	Plans	Prospects	Vendors	Comments
MWWSXRFL02 Hudson CY15 (Event ID: 10000000124626)						
	Current Goals (Volunteer)	Current Goals (Staff)	Current Year Actuals	2014	2013	2012
Gross \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$92,076.68	\$105,261.93	\$105,790.42
Expenses \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$3,636.43	\$3,626.75	\$4,918.03
Net \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$88,440.25	\$101,635.18	\$100,872.39
New Team Income \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$7,820.00	\$15,070.00	\$7,962.25
Returning Teams Income \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$39,371.00	\$54,696.00	\$55,258.78
Total Team Income \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$47,191.00	\$69,766.00	\$63,221.03
Sponsors income \$:	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	\$0.00	\$22,650.00	\$26,550.00	\$30,550.00
<input type="button" value="Save Goals"/>		<input type="button" value="Save Goals"/>				
Previous Year Averages						

The **Financial tab** is where you can view the previous year's actual amounts, the current YTD actuals, and set both the staff goal and view/adjust the volunteer goal.

Once your goal is entered, be sure to select **Save Goal**.

Volunteer goals should be in the system by October 15.

Plans Tab



The screenshot shows a web interface with a navigation bar at the top containing tabs: Event Information, Non Financial, Financial, Plans, Prospects, Vendors, and Comments. The 'Plans' tab is selected. Below the navigation bar is a form with a label 'Select Plan:' followed by a dropdown menu. The dropdown menu is open, displaying a list of plan categories: Accounting and Registration, Entertainment/Activities/Ceremonies, Fundraising, Logistics, Luminaria, Marketing and Publicity, Mission and Advocacy, Online, Sponsorship, Survivor and Caregiver, Team Development, Team Recognition, Team Recruitment, Team Retention, and Youth Engagement. To the right of the dropdown menu, there is a text box containing the following text:

The **Plans tab** is for volunteers to answer a series of questions that relate to how they will achieve their goals for the year.

Notes:

- Leadership volunteers and Staff partners do not have specific plans as they are in charge of ensuring all other plans are completed and work together.
- People Leads should complete plans for Team Development and Recruitment, with the assistance of Community Champions and Team Ambassadors.
- If retaining a committee structure for 2015 vs. Event Leadership Team structure, Team Recruitment, Team Recognition and Team Retention plans should be completed by those individuals responsible for each function.
- Smaller committees may have fewer positions and therefore may have a position that is sometimes referred to as a generic Team Development Lead.
- All Team Development positions will see all plans, but if not all those positions exist on your Event Leadership Team /committee, use the Team Development plan as a baseline.

Prospects Tab

MWWSCXRFL02 Hudson CY15 (Event ID: 10000000124626)

Event Information | Non Financial | Financial | Plans | Prospects | Vendors | Comments

#	Contact First	Contact Last	Date Created	Status	Date Contacted
New					

Prospects is a central place for staff and volunteers to enter in prospective contacts for teams, survivors, caregivers, sponsors, committee members, etc.

To add a new prospect click **New** and enter the information on the new screen. Select **Update** to save the information.

MWWSCXRFL02 Hudson CY15 (Event ID: 10000000124626)

Event Information | Non Financial | Financial | Plans | Prospects | Vendors | Comments

#	Contact First	Contact Last	Date Created	Status	Date Contacted
Business Name	<input type="text"/>	Address	<input type="text"/>	City	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>
Contact First	<input type="text"/>	Contact Last	<input type="text"/>	Phone number	<input type="text"/>
e-Mail Address	<input type="text"/>	New?	<input type="checkbox"/>	Location	<input type="text"/>
Status	<input type="text"/>	Comments	<input type="text"/>		
Contacted By	<input type="text"/>	Date Contacted	<input type="text"/>		

Update Cancel

Vendors Tab

MWWSCXRFL02 Hudson CY15 (Event ID: 10000000124626)

Event Information | Non Financial | Financial | Plans | Prospects | Vendors | Comments

#	Vendor Name	Vendor Type	Address	Contact Name	City	State	Zip	New?
New No data to display								

Vendors tab is the “yellow pages” for your event . It is a place to capture all the contacts you use to put the event together.

MWWSCXRFL02 Hudson CY15 (Event ID: 10000000124626)

Event Information | Non Financial | Financial | Plans | Prospects | Vendors | Comments

#	Vendor Name	Vendor Type	Address	Contact Name	City	State	Zip	New?	
Vendor Name	<input type="text"/>	Vendor Type	<input type="text"/>	Contact Name	<input type="text"/>	Address	<input type="text"/>	City	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>	New?	<input type="checkbox"/>	Phone	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>						

Update Cancel

To add a new vendor click **New** and enter the information on the new screen. Select **Update** to save the information.

Comments Tab

The screenshot shows a web application interface for an event. At the top, there is a header with a calendar icon and the text "MWWSCXRFL02 Hudson CY15 (Event ID: 100000000124626)". Below the header is a navigation bar with several tabs: "Event Information", "Non Financial", "Financial", "Plans", "Prospects", "Vendors", and "Comments". The "Comments" tab is currently selected. The main content area displays a table with the following columns: "#", "Created Date", "Staff Name", and "Comment". The "Comment" column is currently empty, and there is a large text input field for adding a new comment. At the bottom right of the input field, there are two buttons: "Update" and "Cancel".

#	Created Date	Staff Name	Comment
			<input type="text"/>

Comments section is a place to keep a running log of updates associated to your event. This is where you can add in wins in recruitment or issues you have surfaced throughout the event.