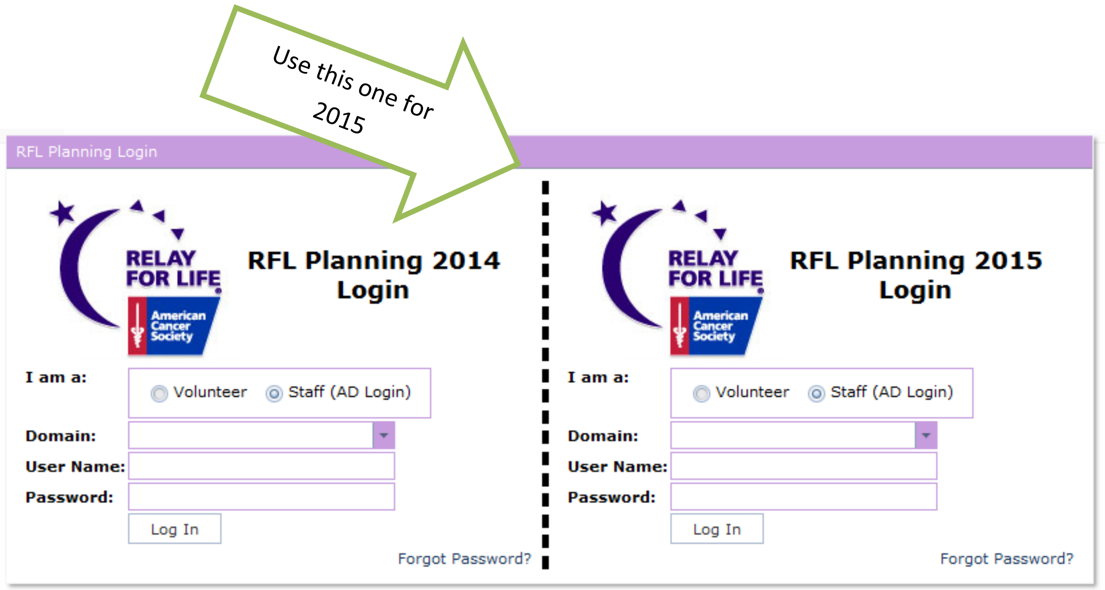
Relay Planning Tool - Volunteer

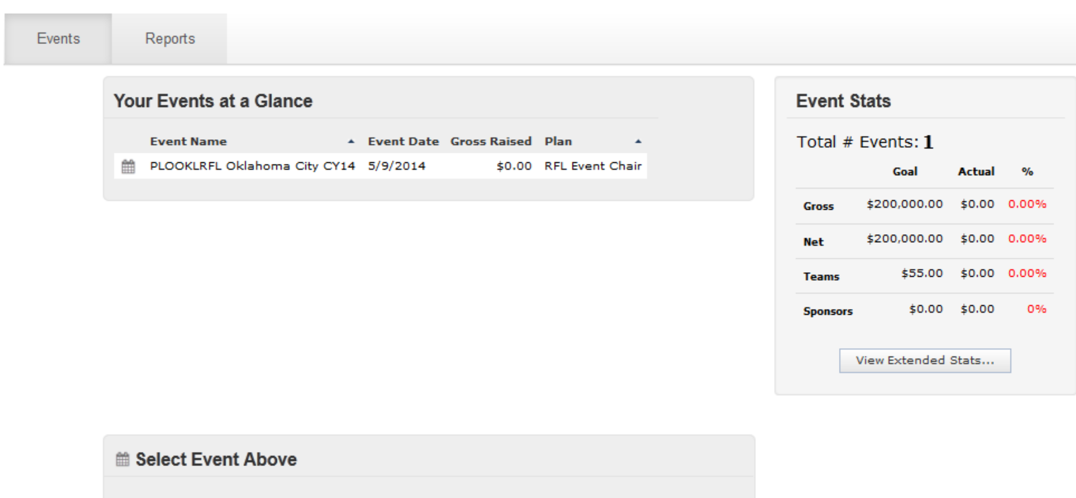
Relay Planning Tool can be found at http://rpt.cancer.org

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**



Select Log In and the dashboard page will open.

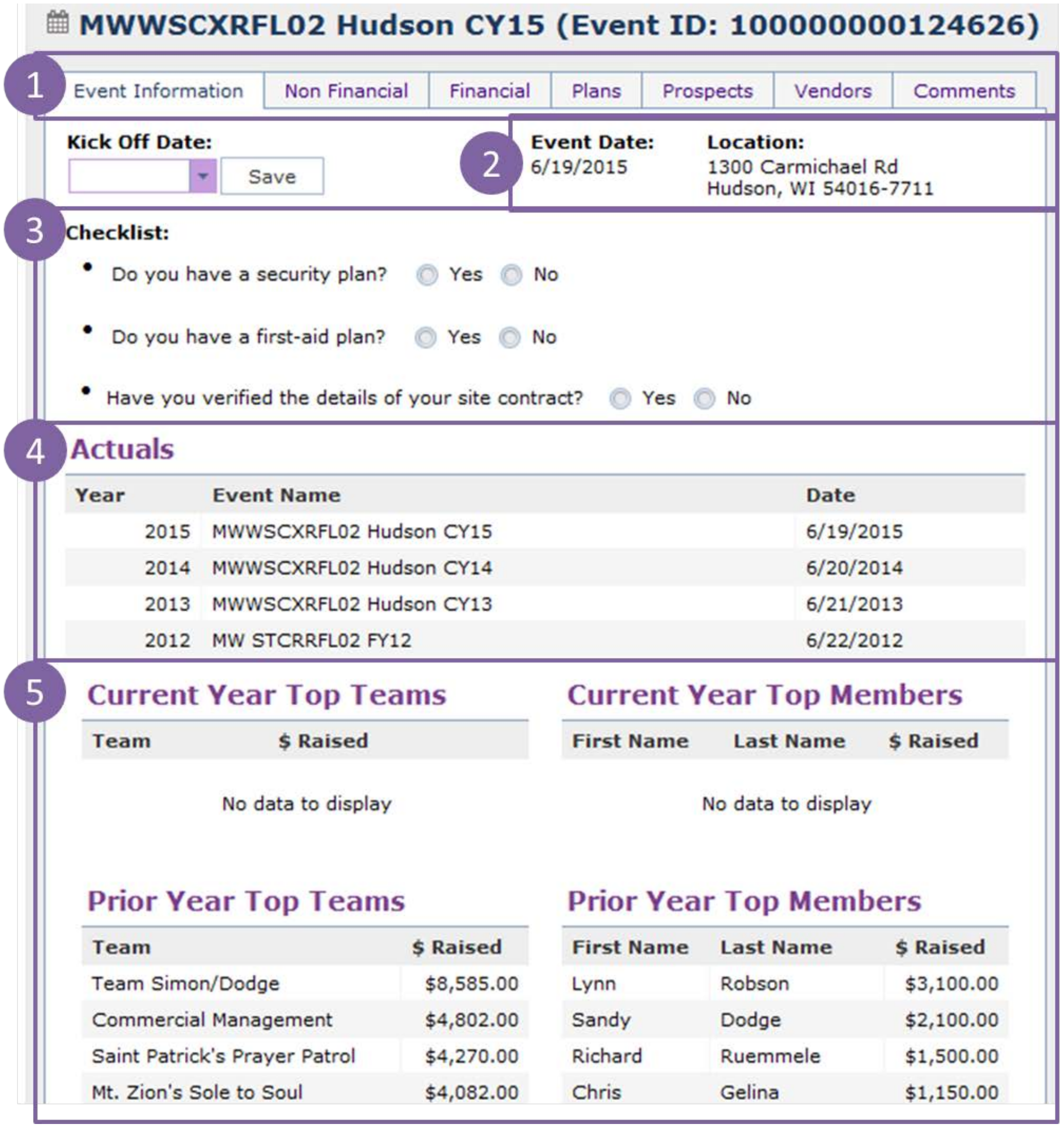
Step 2: Once logged in, you will see your event listed at the top of the screen. **Click** on the **event name** to dive deeper into the event information and goals.



The 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

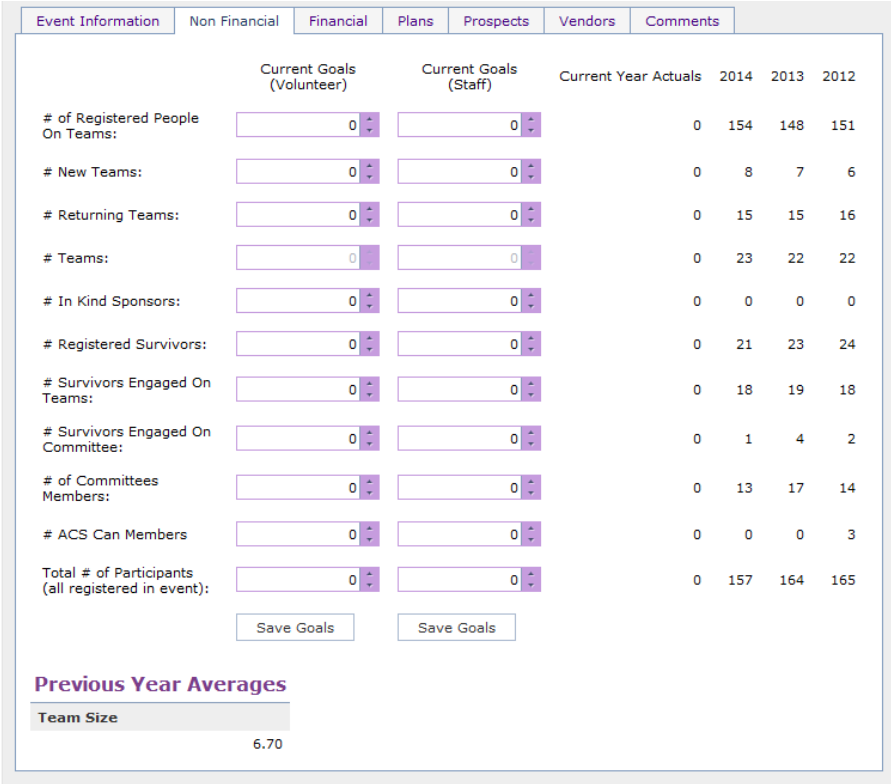


1. Event specific tabs that contain goals, plans, and contacts
2. Event information pulled from EMT
3. Logistics checklist
4. Historical actuals from previous year’s events
5. Top team and individual fundraisers from previous year and current year
6. To Do List with links to tasks to complete

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:	0	0	0	154	148	151
# New Teams:	0	0	0	8	7	6
# Returning Teams:	0	0	0	15	15	16
# Teams:	0	0	0	23	22	22
# In Kind Sponsors:	0	0	0	0	0	0
# Registered Survivors:	0	0	0	21	23	24
# Survivors Engaged On Teams:	0	0	0	18	19	18
# Survivors Engaged On Committee:	0	0	0	1	4	2
# of Committees Members:	0	0	0	13	17	14
# ACS Can Members	0	0	0	0	0	3
Total # of Participants (all registered in event):	0	0	0	157	164	165
	Save Goals	Save Goals				

Previous Year Averages

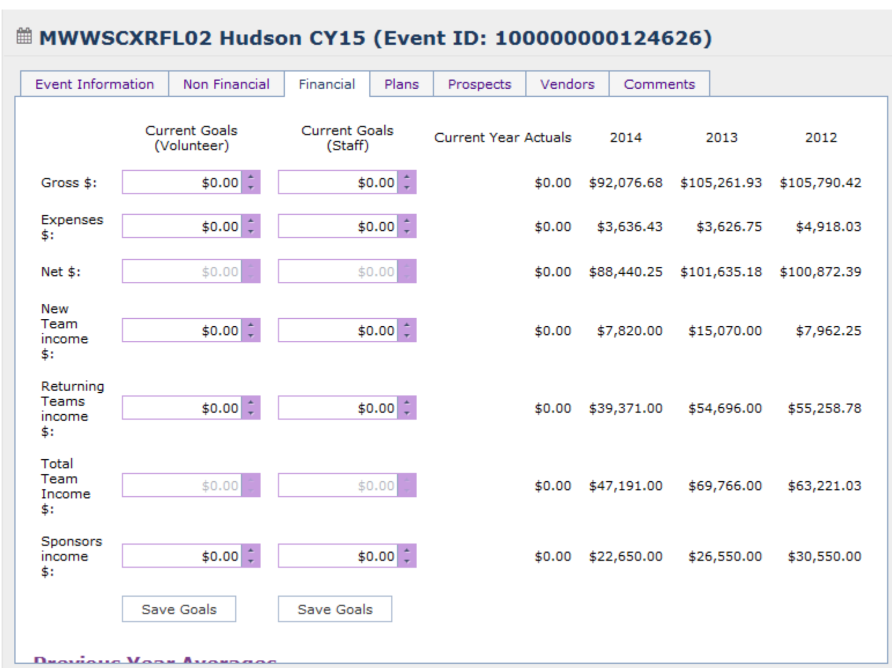
Team Size
6.70

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



MWWSCXRFL02 Hudson CY15 (Event ID: 100000000124626)

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

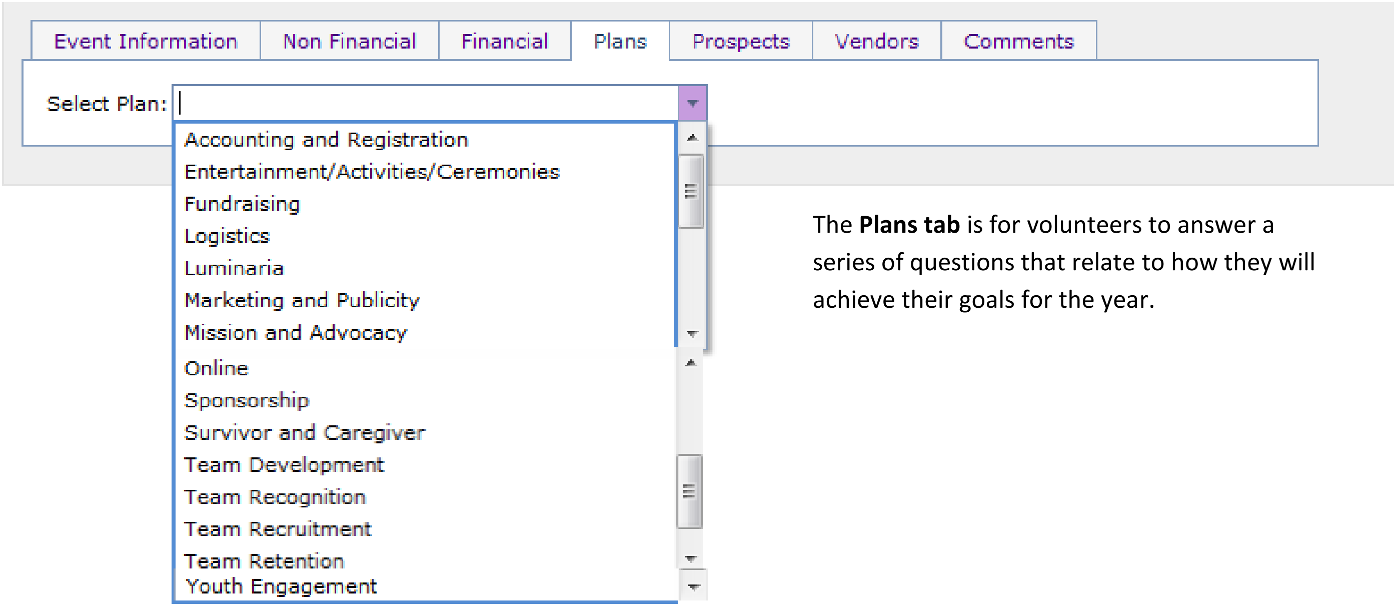
	Current Goals (Volunteer)	Current Goals (Staff)	Current Year Actuals	2014	2013	2012
Gross $:	$0.00	$0.00	$0.00	$92,076.68	$105,261.93	$105,790.42
Expenses $:	$0.00	$0.00	$0.00	$3,636.43	$3,626.75	$4,918.03
Net $:	$0.00	$0.00	$0.00	$88,440.25	$101,635.18	$100,872.39
New Team income $:	$0.00	$0.00	$0.00	$7,820.00	$15,070.00	$7,962.25
Returning Teams income $:	$0.00	$0.00	$0.00	$39,371.00	$54,696.00	$55,258.78
Total Team Income $:	$0.00	$0.00	$0.00	$47,191.00	$69,766.00	$63,221.03
Sponsors income $:	$0.00	$0.00	$0.00	$22,650.00	$26,550.00	$30,550.00
	Save Goals	Save Goals				

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

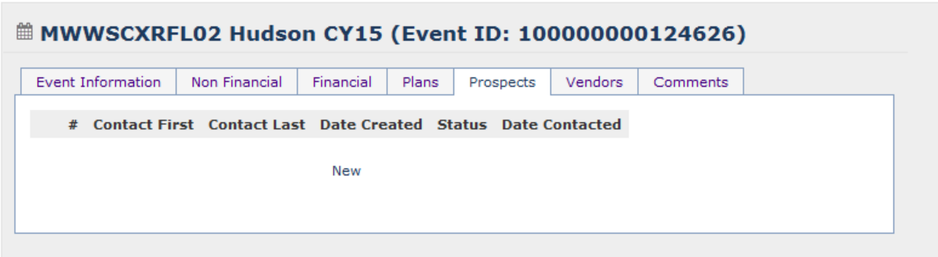


The **Plans tab** is for volunteers to answer a series of questions that relate to how they will achieve their goals for the year.

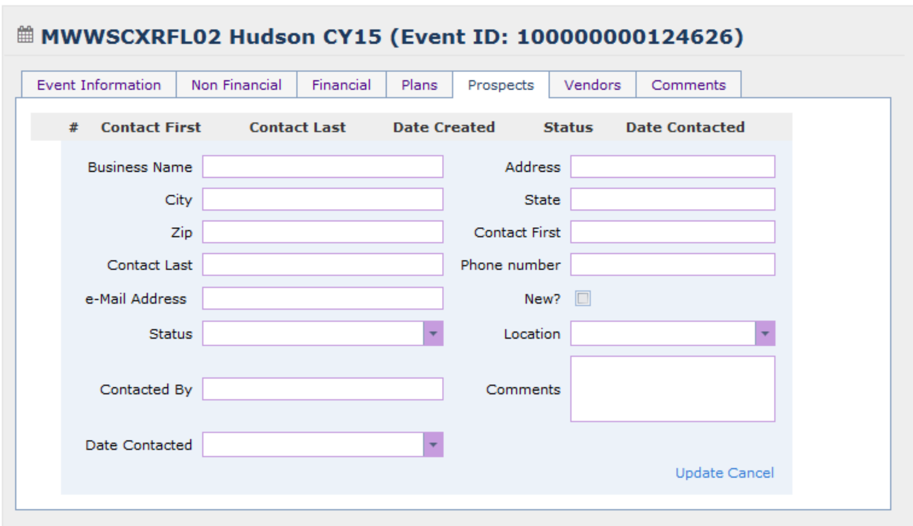
Notes:

- 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

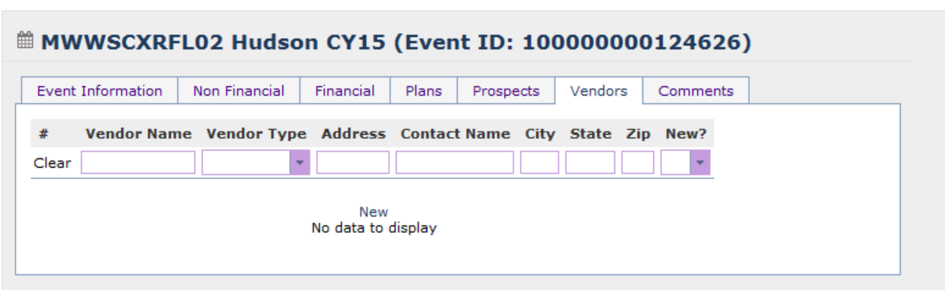


Prospects is a central place for staff and volunteers to enter in prospective contacts for teams, survivors, caregivers, sponsors, committee members, etc.

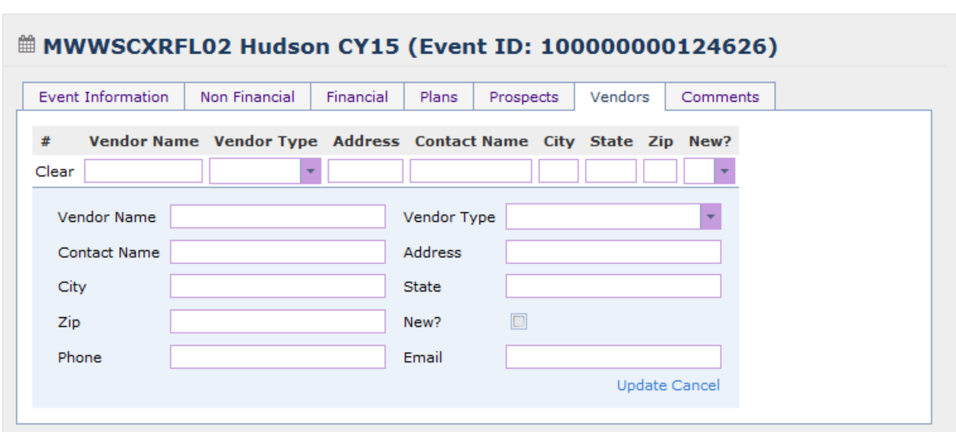


To add a new prospect click **New** and enter the information on the new screen. Select **Update** to save the information.

Vendors Tab

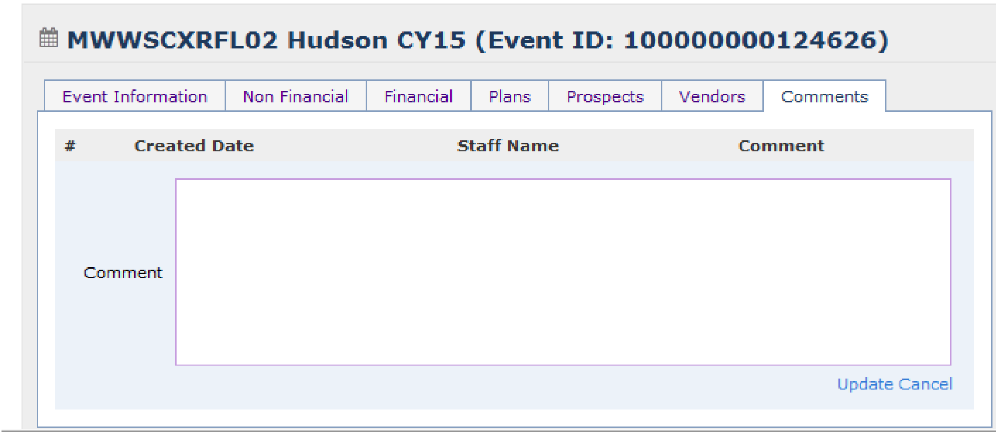


Vendors tab is the "yellow pages: for your event . It is a place to capture all the contacts you use to put the event together.



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

Comments Tab



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.