Solve for Good

How to Sign-Up and Apply for Projects

In this step-by-step tutorial, you will learn how to sign up on Solve for Good as a volunteer, join a volunteer group, and start applying to project work.

Solve for Good is an online platform for social good organizations to post projects they need help with, for volunteers to help scope those projects into well-defined problems, and to help solve those problems. To start working on projects, you must create a volunteer account, complete a volunteer profile, and apply to project tasks.

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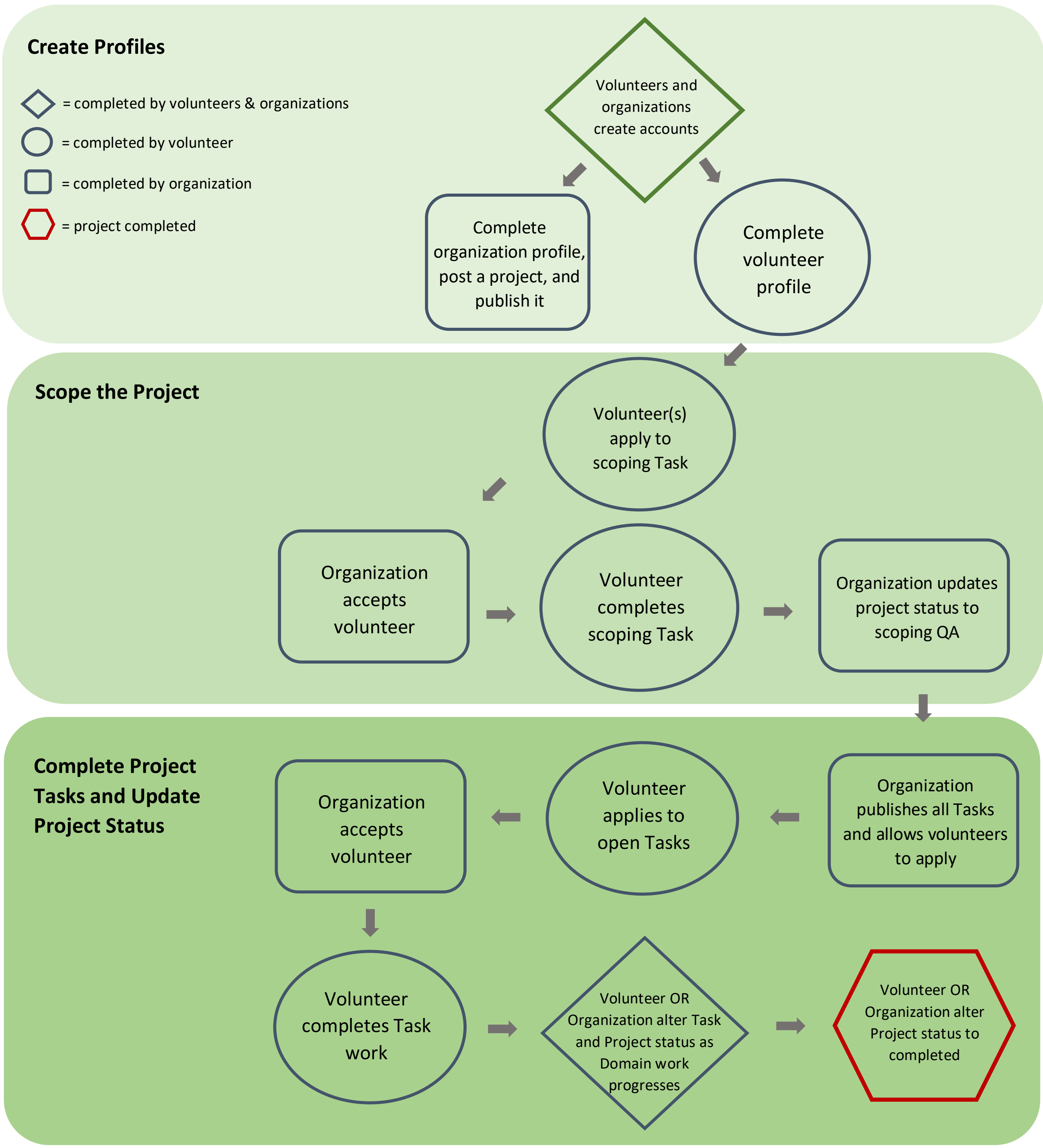
Understanding the Solve for Good Project Process

The diagram below depicts a simplified version of the project process for projects placed on the Solve for Good platform. Organizations and volunteers work together to complete their projects, with opportunity for collaboration and quality assurance.

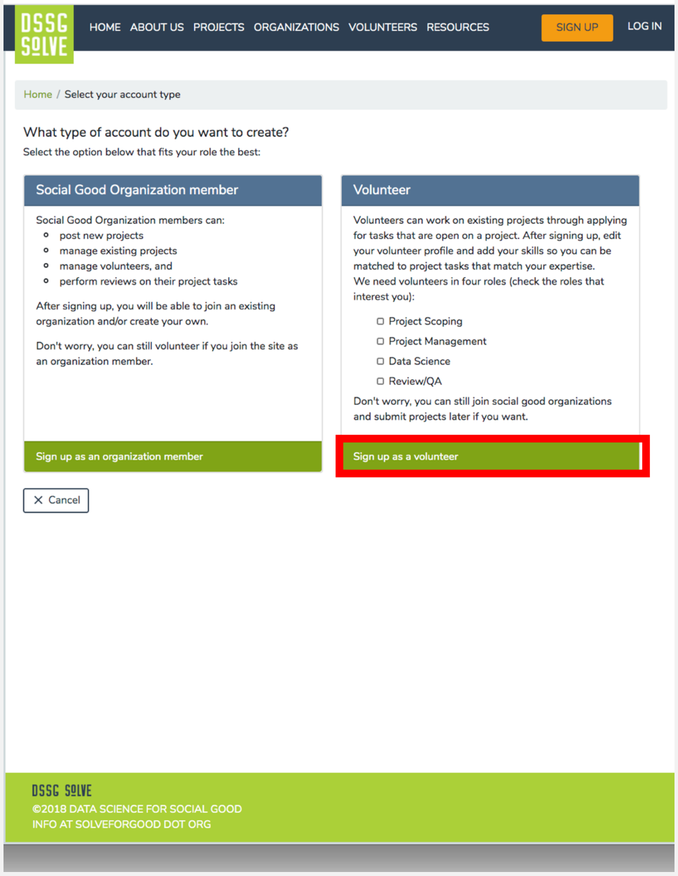
Importantly, Tasks are the main unit of work for a project. This tutorial will go in depth about how to apply to a project's Task and the purpose behind each step.



Sign up for Solve

Press the “sign up” button.

To sign up as a volunteer, press the **SIGN UP** button on the Solve for Good homepage (highlighted in red in the image on the right). You may also sign up using the other orange buttons.



Select your account type

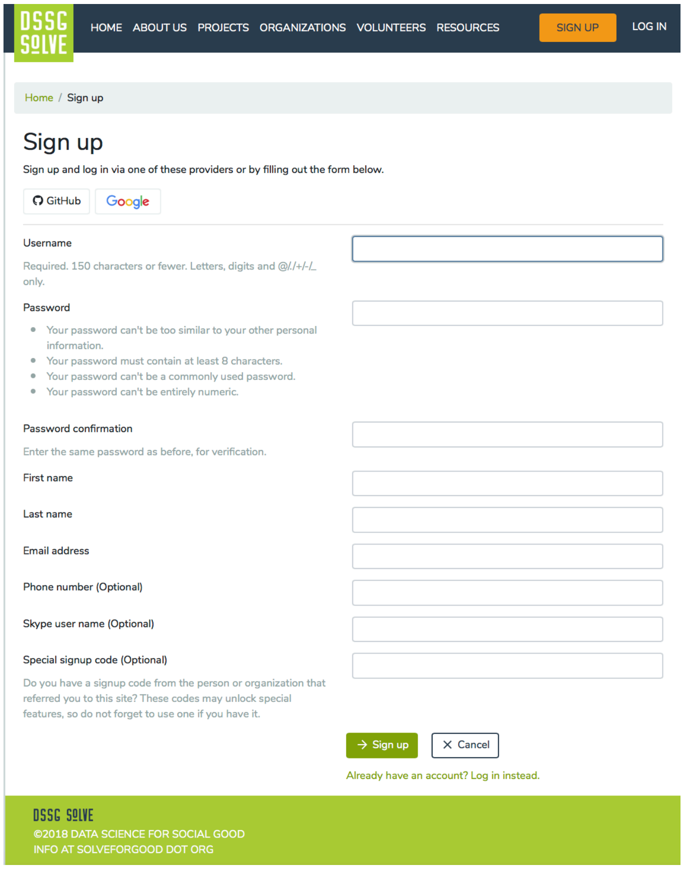
To create a volunteer account, select "Sign up as a volunteer" highlighted in red in the image on the right.

The last section titled "task type preference" lists the four main tasks of a project: project scoping, project management, data science, and review/QA.

- Project scoping: detailing the project requirements and metrics used to evaluate the solution
- Task and project QA: quality assurance of the domain work
- Domain work: discrete pieces of the project (i.e. data science tasks, data analysis tasks, etc.)
- Project management: tracking the work of the project

Rather than being assigned to a whole project, volunteers will apply to work on one of these four tasks of a project. This is to ensure that your skills and interests are being optimally used. You can select as many of these task type preferences as you would like when setting up your account.

Note: You can still post projects even if you create a volunteer account. To do so, you must join an organization. More details on how to join an organization will come later in this tutorial.



Note: There are three ways you can create an account: manually, connecting a Google account, and connecting a Github account. By creating an account manually or using an existing Github account, you must verify your account via the corresponding email account. If you choose to create an account using an existing Google or Github account, you will not have to create a password. Please skip ahead to one of the following three steps that pertains to your preferred method.

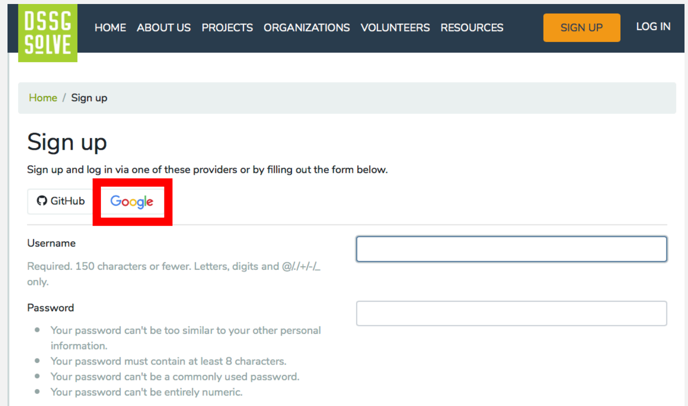
Creating an account manually.

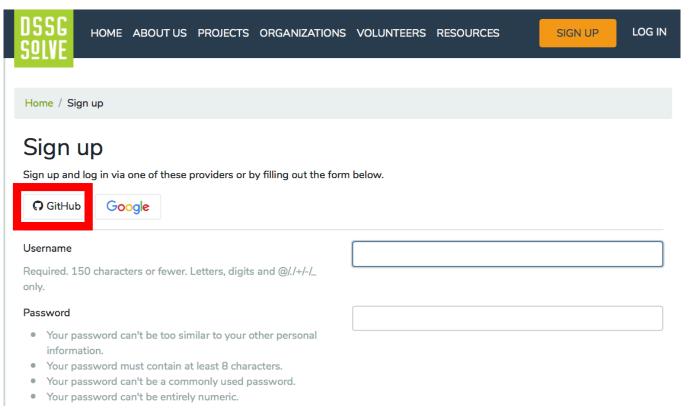
To manually create an account, fill out all the requested information on this page. You will receive a confirmation email asking you to verify your email. This will activate your account.

Creating an account by connecting a Google account

Select the "Google" icon on the sign-up page, highlighted in red on the image to the right. This will redirect you to Google where you must select a Google account.

After selecting the Google account, you will be redirected to the Solve homepage. A green banner at the top will notify you that your account was successfully created.





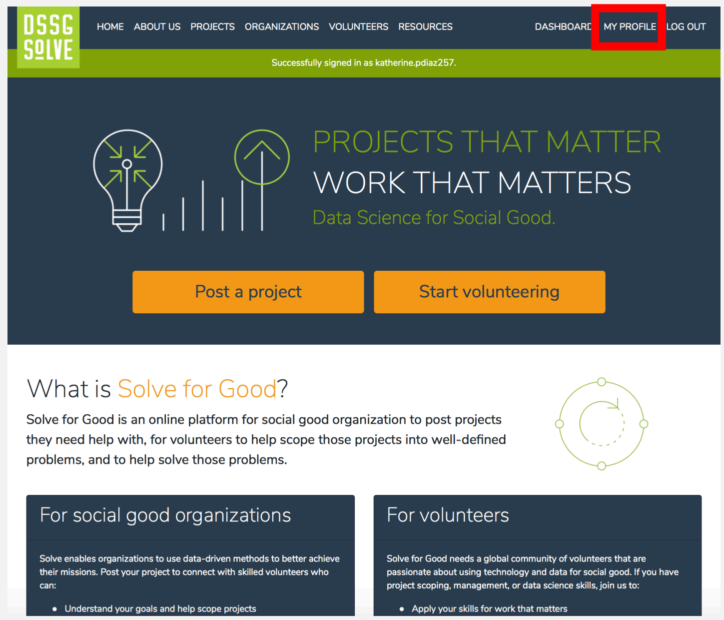
Creating an account by connecting a GitHub account.

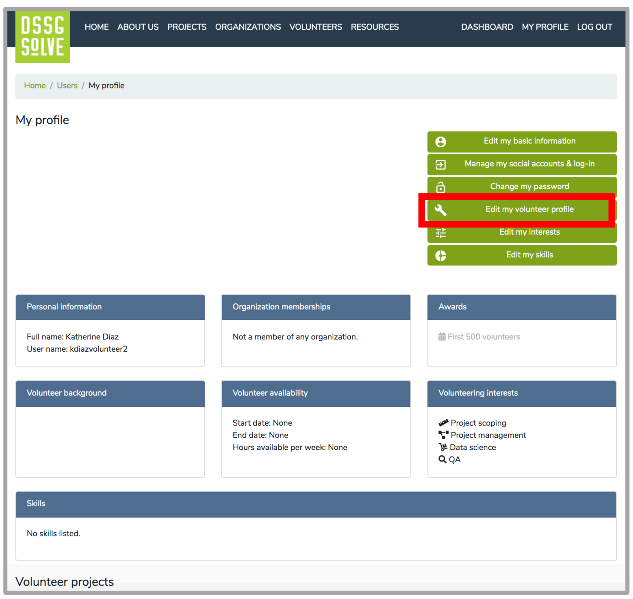
Select the "GitHub" icon on the sign-up page, highlighted in red on the image to the right. This will redirect you to Github, where you must authorize the sign-up request.

After authorizing your GitHub account, you will be redirected to the Solve homepage. A green banner at the top will notify you that your account was successfully created.

Update your volunteer profile

Before joining an organization or project, we will go over how to add more details to your volunteer profile. Click on the **My Profile** button on the upper right-hand side of your screen.





Update your volunteer profile

The information on your volunteer profile is viewable by organizations and other volunteers.

To update your volunteer profile, click on **Edit my volunteer profile**, found in green on the right sidebar.

Note: This view is known as your **Profile**. Here you can see your saved personal information, what organizations or projects you are a part of, your displayed availability, and volunteer background and interests. You can update these items as needed using the green buttons on the right-hand side of the Profile page.

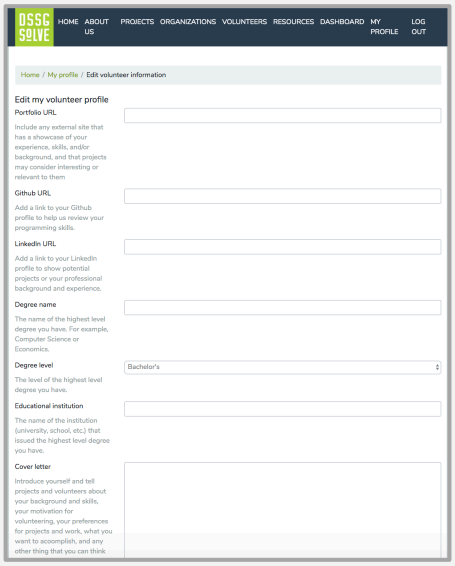
Update your volunteer profile

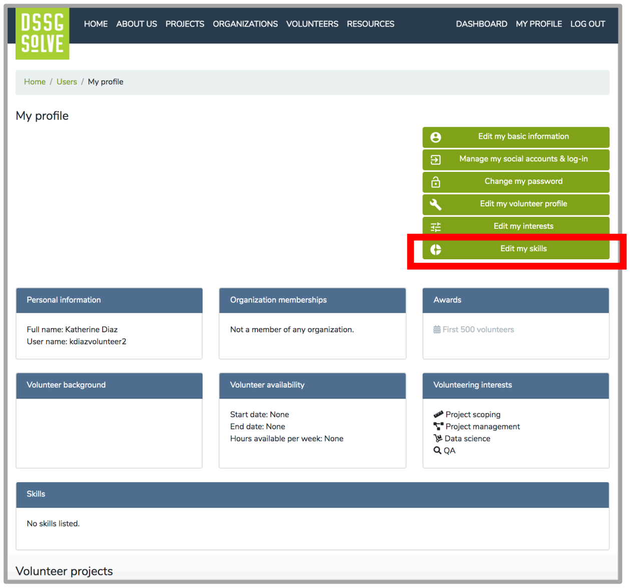
Fill out all the relevant information about yourself.

The volunteer profile information falls into three categories: URLs, education information, and availability. The URLs and educational information provide organizations a better sense of who you are and your relevant experience. Your availability is key so organizations can properly assess if your time constraints meet their project demand.

When you are finished, click **Save** at the bottom of the page.

Note: This information can be edited again at a later date. It's important that your volunteer profile remains up-to-date to ensure proper project placement.





Update skills

The Solve platform allows you to choose your expertise level in a variety of social science, data science, project management, and other skills that would be needed to complete project tasks. This information is viewable by organizations and volunteers who view your profile.

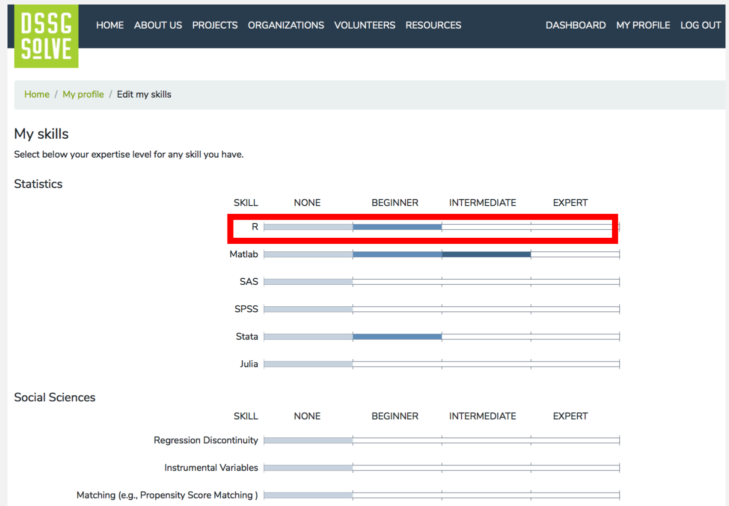
Update your skills by pressing the "Edit my skills" button.

Update skills

On this page, you can select your expertise level for each of the displayed skills by selecting the section of the bar that pertains to the four levels: None, Beginner, Intermediate, or Expert.

When you are finished, click **Save my skills** at the bottom of the page.

Note: This information can be edited again at a later date.



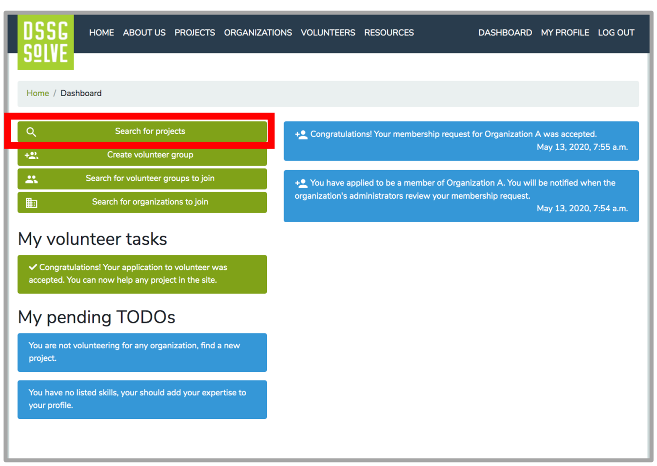
Apply for a project task

To begin doing volunteer work, you will start by applying to a project task. From the Dashboard, press the "search for projects" button.

Projects have four main tasks: scoping the project, data science, project management, and quality assurance. These were the tasks outlined in earlier when creating your account.

Now you are ready to apply to join a project. First, return to your Dashboard by clicking on **Dashboard** in the upper right-hand side of your screen.

To apply for a project, click on "**Search for projects**", found in green on the left-hand toolbar.



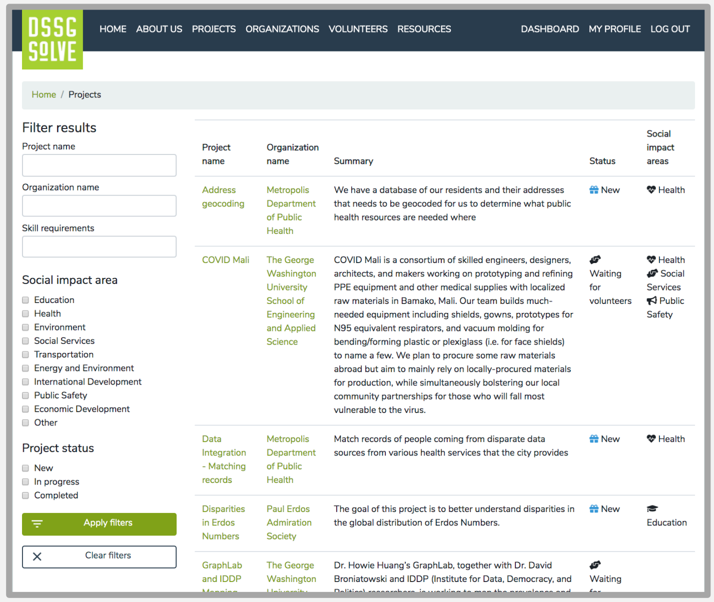
Note: Your organization membership request and decision can be found on the right-hand side of this page. All future notifications can be found here.

Search for project

Select the project you wish to join by clicking on the project name.

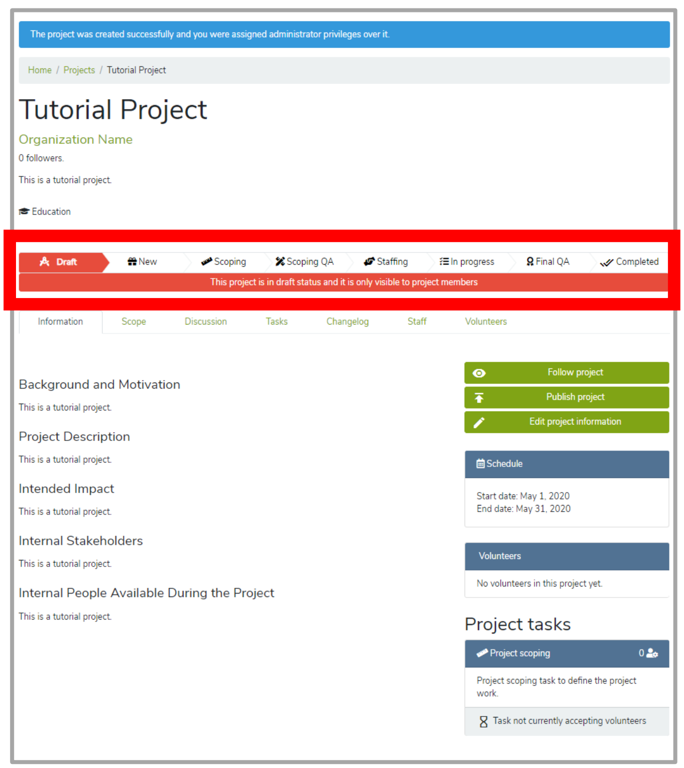
On this page, projects are listed by alphabetical order of the project name. This page allows you to filter for projects by the project name, organization name, skill requirements, social impact area, or project status. If you would like to use filters, make sure to click the green "Apply filters" button to apply them to your search.

You can also get to this page by clicking on the **Projects** tab on the top menu.



Project overview

This page provides a Project overview.



Here you will see information about the **status of the project, the project scope, relevant discussion, tasks, the changelog, staff, and volunteers**.

The main component of this page is the full lifecycle of a Solve project (highlighted in red), which shows you the lifecycle step that the project is currently on. The lifecycle steps are:

- **Draft:** this view is only accessible for those **Staff** on the project.
- **New:** a project has been published by the organization administrator. It is during this phase, the first volunteer (a scoping volunteer) may apply.
- **Scoping**: in this stage, the project is being scoped
- **Scoping QA**: because Solve is volunteer-run, it is important that there are mechanisms for quality assurance. By default, each component of work on a project is subject to QA review, starting with project scoping QA.
- **Staffing:** in this stage, volunteers will apply for the project Tasks as defined during the scoping process.
- **In-progress:** after Tasks have been staffed, they will be in-progess until submitted.

- **Final QA:** the last and final QA of this project. This is the last chance to make final changes, contributions, and corrections to the project work.
- **Completed:** the project is done!

You may join a project by clicking the green **Apply to volunteer** button located above the lifecycle.

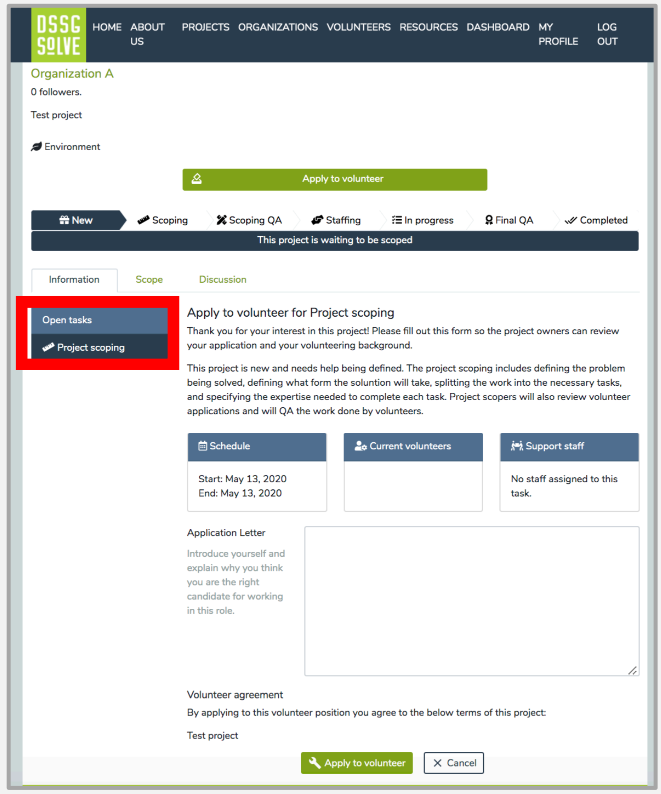
Note: This button is presented only when the organization administrator is actively seeking volunteers for the project. If the button is not there but you would still like to receive updates on the project, click on the green **Follow project** button on the middle right-hand side of the screen.

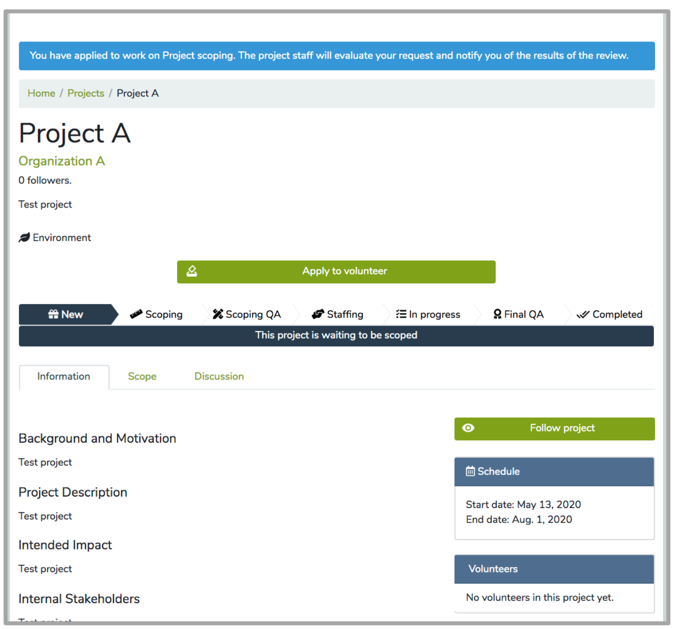
Complete volunteer application

Fill out the application letter and click “Apply to volunteer” at the bottom to submit the application.

This image is demonstrating the user applying for **Project scoping**, as seen at the right of the application page (highlighted in red in the image). When future **Tasks** are created and visible by volunteers, they will be displayed on the same menu. This process of applying to scope for a project will be followed when applying for data science, project management, and quality assurance tasks.

This volunteer application is your opportunity to share what excites you about the project! You can share what makes you qualified for this particular Task you are applying for. This is also where you can share contact information with the organization.





Pending volunteer application notification

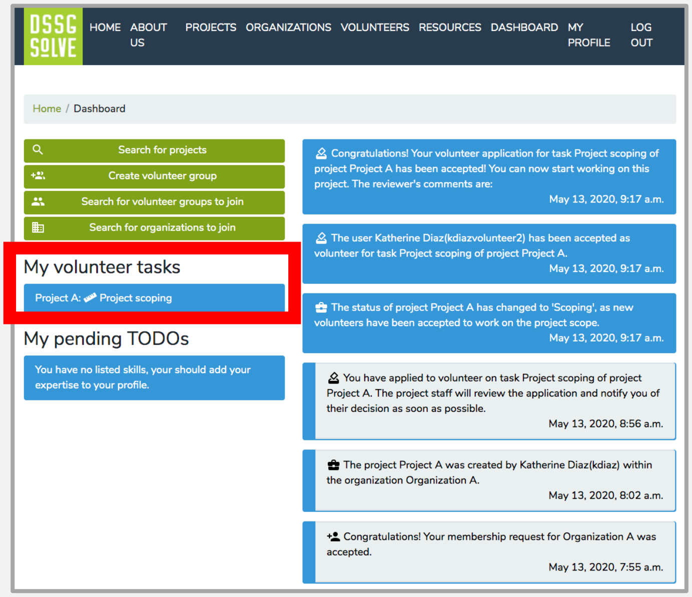
You will receive a blue notification on the project page confirming your application. You will be notified of a decision once your request has been reviewed by the organization administrator.

Find your Project and Task(s)

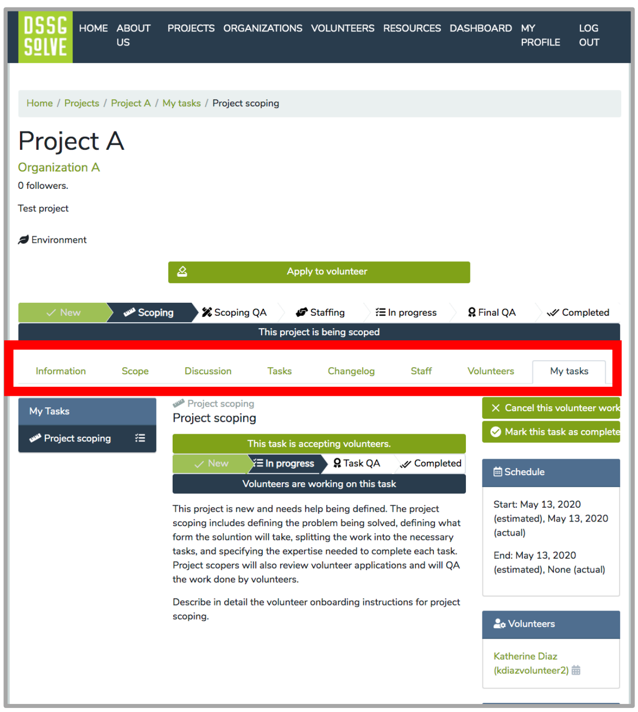
If your volunteer application is approved, you will be able to view the Project's page and task information. To view the project and your tasks, start by going to your **Dashboard**.

Your **Task(s)** will be displayed on the middle left-hand side under the **My volunteer tasks** header (highlighted in red).

Click on the **Task** (in this image, it is Project A: Project scoping).



Project toolbar



The project toolbar has eight tabs:

- Information: basic information about the project and its goals
- Scope: contains project details and metrics for completion
- Discussion: allows for volunteers to start discussion threads
- Tasks: lists the project tasks and progress
- Changelog: details project edits
- Staff: lists organization staff
- Volunteers: lists volunteers
- My tasks: lists the tasks that you applied for and were accepted to work on

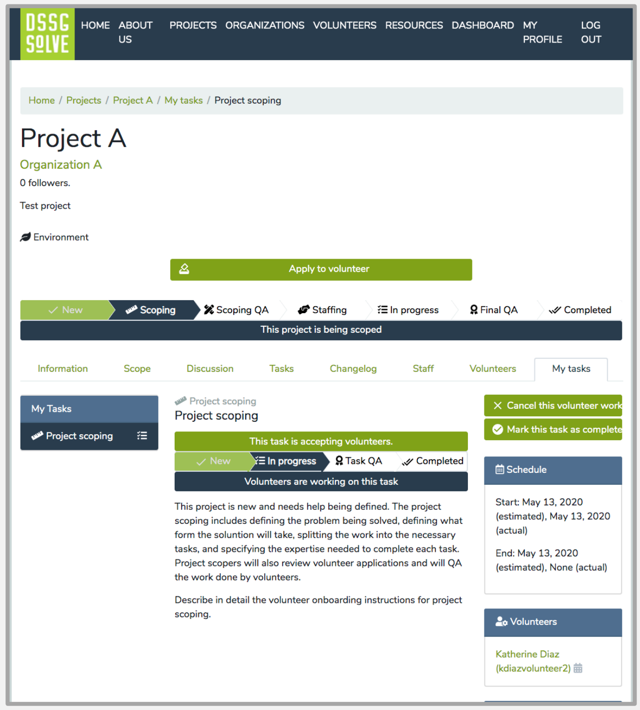
Let's explore each tab of the project toolbar.

My tasks view

On the "My tasks" page you can find:

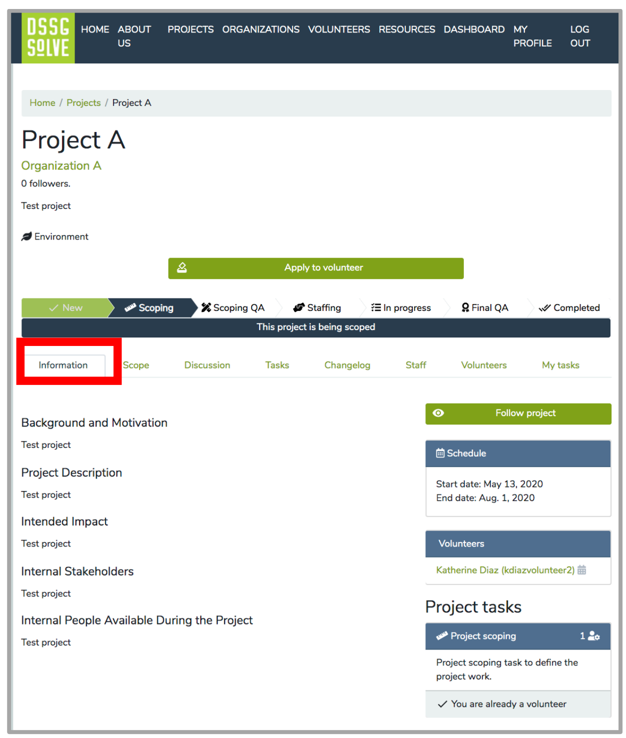
- The tasks assigned to you under the "My tasks" heading on the middle left-hand side of the screen
- The lifecycle for your assigned **Task** (this is different from the lifecycle of the **Project**)
- A description of the task
- The schedule
- "Cancel this volunteer work" button, giving you the option of leaving the project task
- "Mark this task as completed" button for when you have completed your task, allowing the project to continue to the next task
- The other volunteers working with you

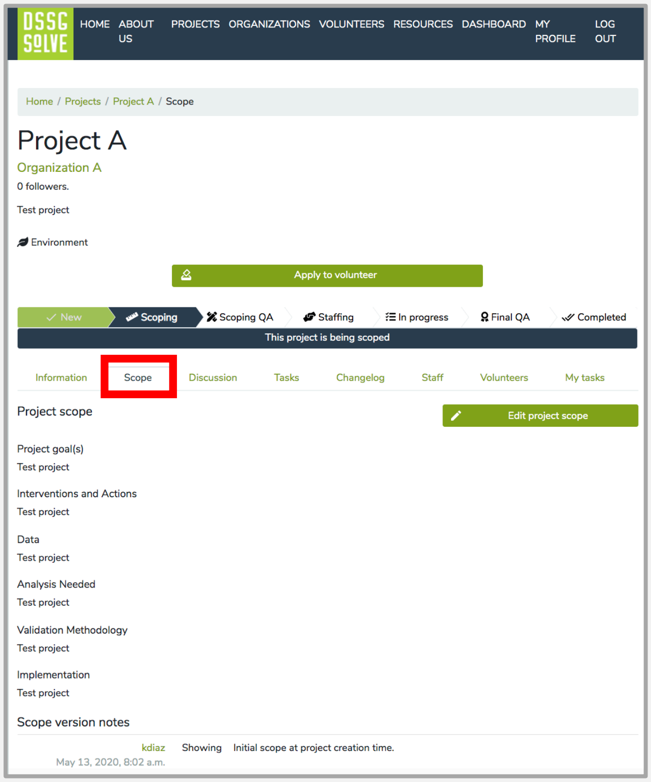
Note: Completed lifecycle steps are highlighted in green, the current lifecycle step is highlighted in blue, and future lifecycle steps are highlighted in white.



Information view

The information tab outlines all the basic information regarding the project.



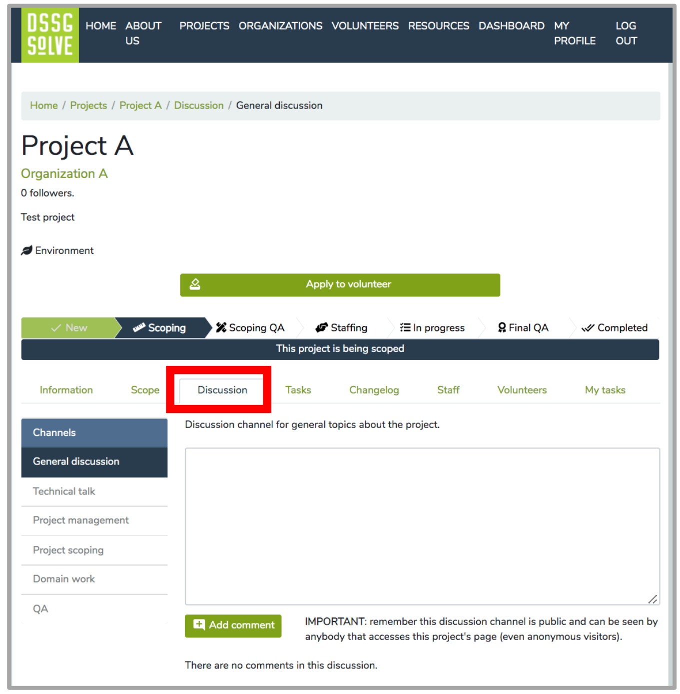


Scope view

The **Scope** tab allows you to see and edit the scope of the project.

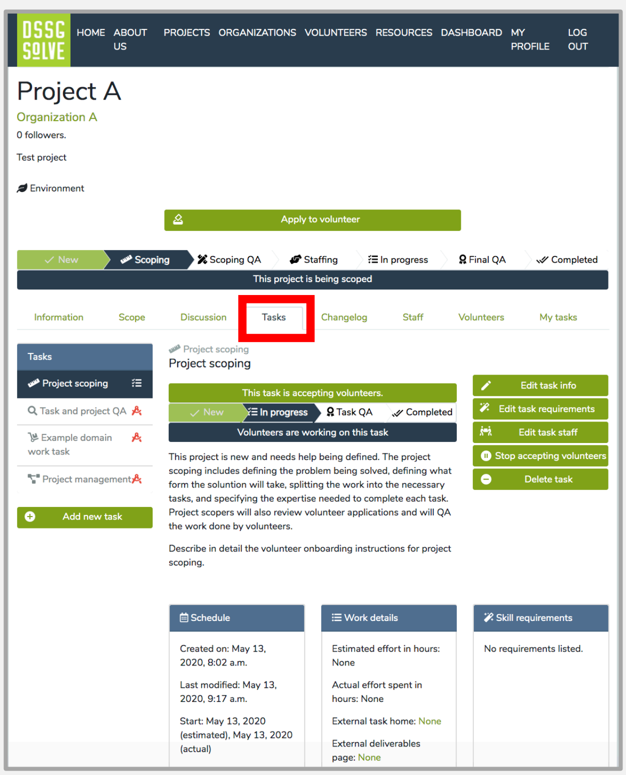
Discussion view

The **Discussion** tab allows you to start discussion threads on the six topics located on the left-hand side of the page: General discussion, Technical talk, Project management, Project scoping, Domain work, and QA.



Tasks view

To see your project's Tasks click on the "Tasks" tab.



The project **Task** view is the most substantial, and one of the most important. **Tasks** are the main mechanism of completing work on Solve.

A list of tasks can be seen on the left side of the page under the **Tasks** toolbar. You can select any **Task** to see its details, and you can add a new **Task** at any time.

By default, each project has four **Tasks: Project Scoping, Task and project QA, Example domain work task, and Project Management** – notice that each of these **Tasks** have a different icon, representing the four types of **Tasks.** These types are **project scoping, quality assurance, data science, and project management,** respectively.

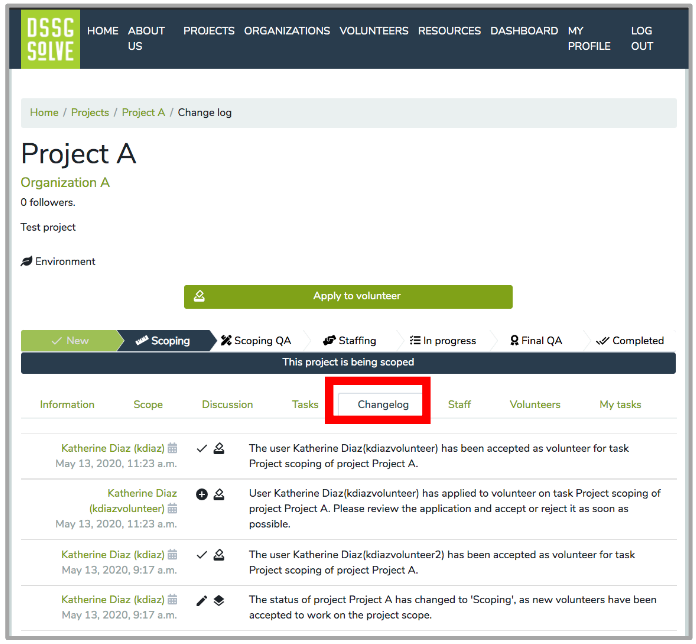
Tasks have four stages, found on the middle section of the page:

- **Draft:** a **Task** is created but not published
- **New**: a **Task** is in this stage when it is created, published, and waiting to be staffed.
- **In progress**: the **Task** is currently being worked on.
- **Task QA**: the **Task** is being reviewed by a staff member or volunteer.
- **Completed**: the **Task** is complete!

If any of the four auto-created tasks does not fit your project, you can create new tasks by selecting the green “Add new task” button.

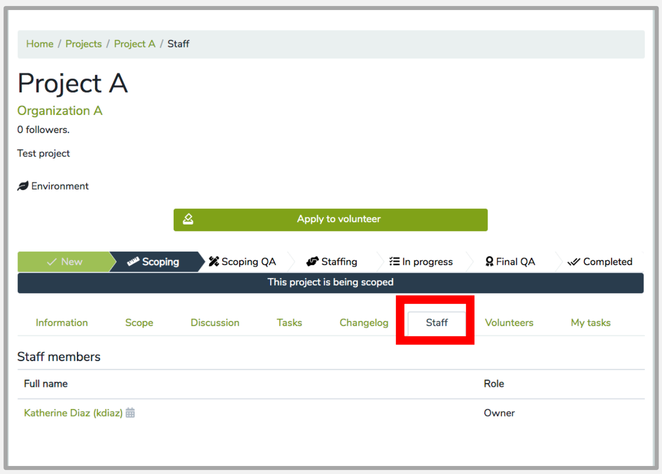
The bottom of the page lists additional information about the task such as its schedule, details, skill requirements, volunteers, reviewers, and staff.

Because Tasks are so important, we will do a deep dive on creating and publishing a task later.



Changelog view

The **Changelog** tab shows all the updates made to a project.

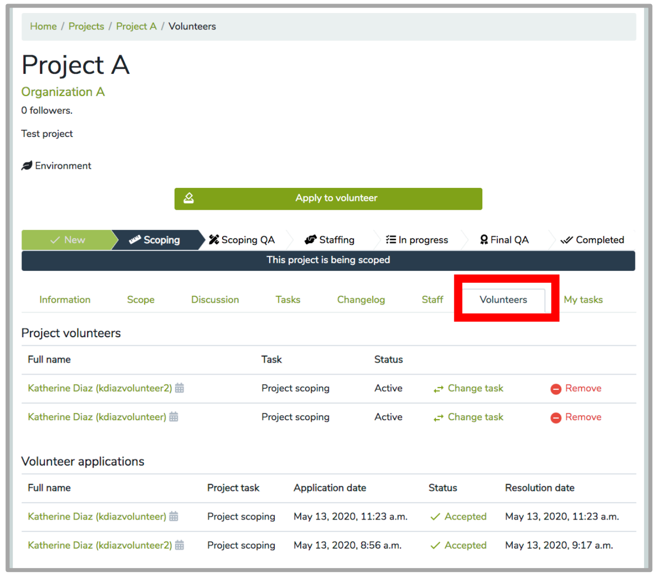


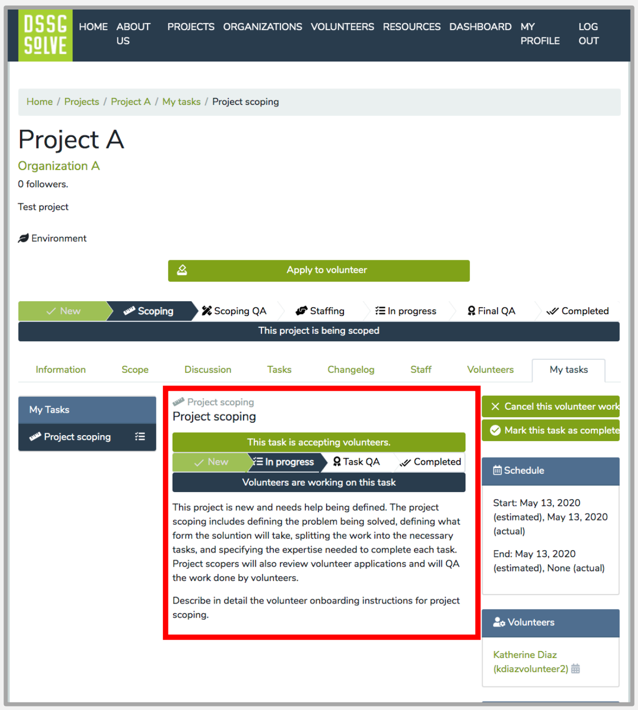
Staff view

Under the **Staff** tab, you can see the staff members of the project and their role.

Volunteers view

The **Volunteers** tab allows you to see the volunteers, their assigned task, and their status. You can also change their assigned task or remove them from the project.





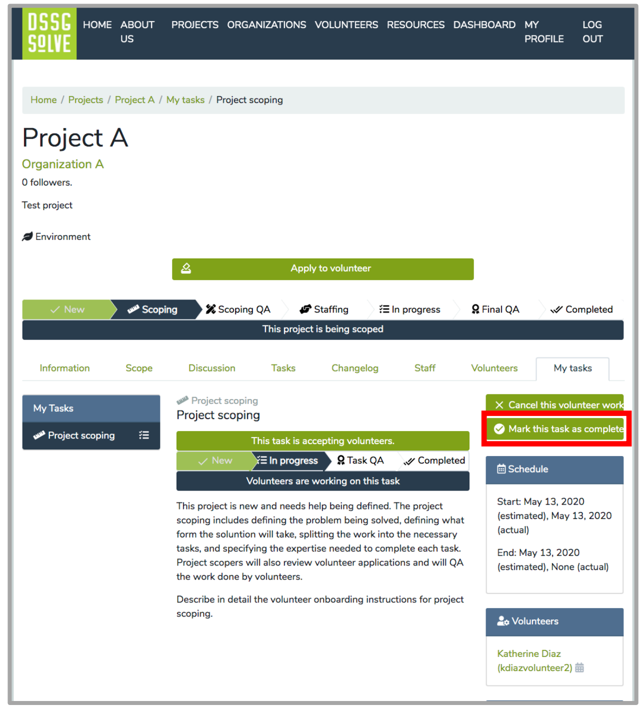
Working on a project

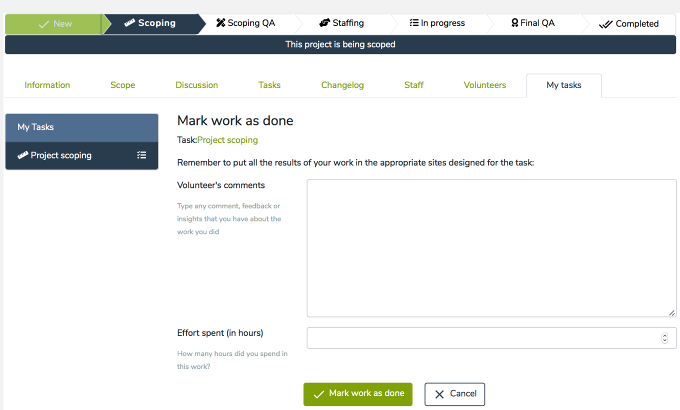
As mentioned previously, volunteers are assigned to **Tasks**, not the Project as a whole. To understand what is expected of your **Task**, return to the “My tasks” tab.

The highlighted portion describes the details given by the organization to the volunteer regarding the task. This section should include goals, analysis needed, and onboarding materials for the volunteer to properly complete the Task.

Working on a project

Once the task is completed, click the "Mark this task as completed" green button.





Working on a project

Include any comments on this page prior to submitting the final approval to marking the work as done. Comments may include a link or instructions to files/data analysis.

Include the approximate amount of hours worked on this **Task**. This will help determine if the initial approximation of effort spent was accurate.

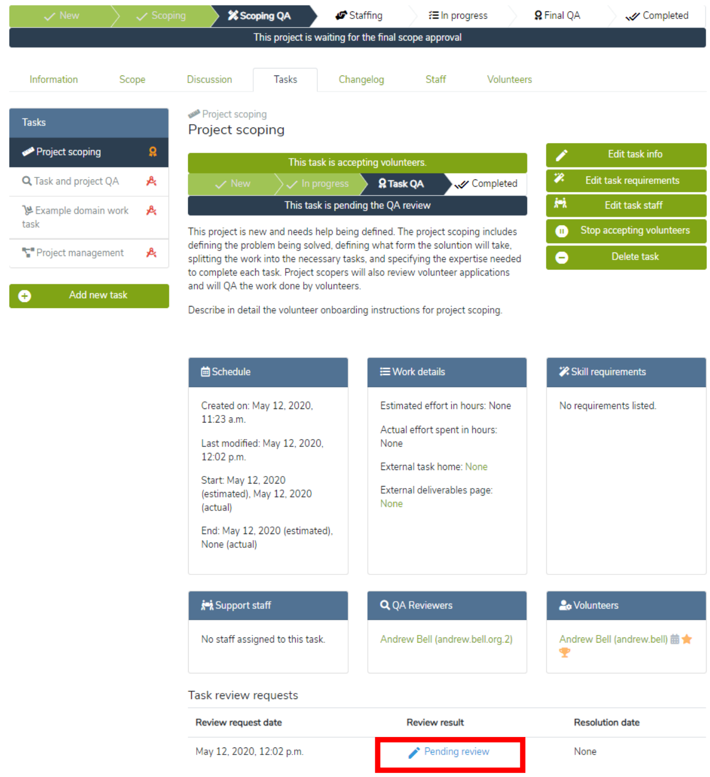
Click "Mark work as done" on the green button to submit your work.

Note: The Task work must be approved by the organization or other volunteer before the project can move forward.

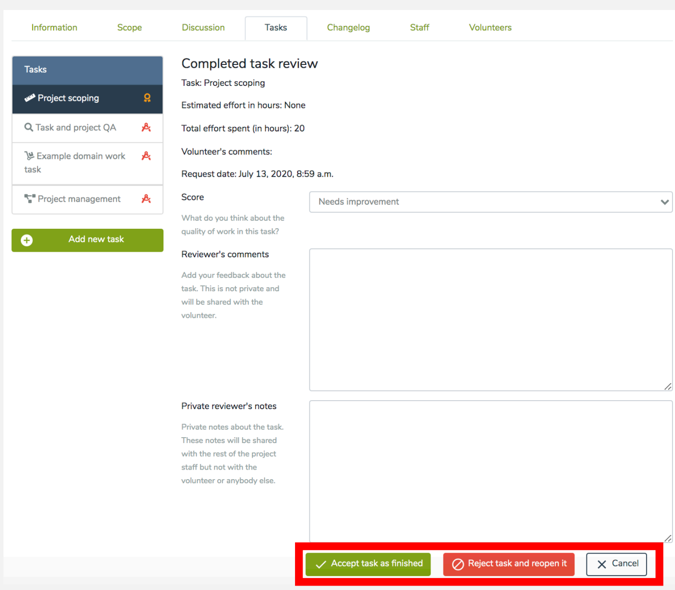
Working on a project

Organizations or volunteers are able to review the work submitted by other volunteers.

Click on “Pending review” at the bottom of the Tasks screen.



Note: You cannot review your own work.



Working on a project

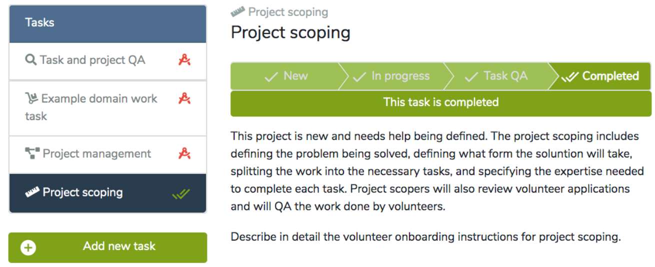
On this page, the organization or volunteer may provide feedback on the completed **Task** work.

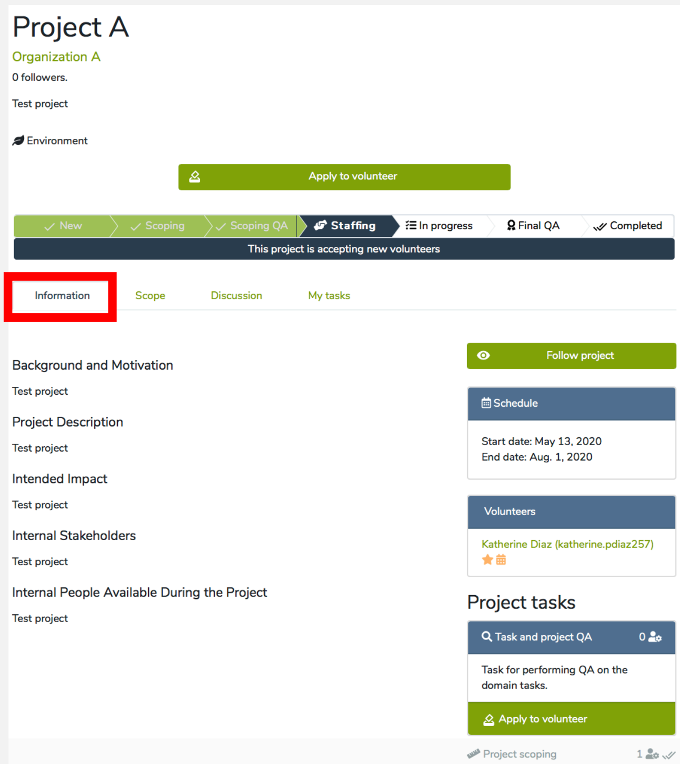
Click on the accept or reject button to submit the feedback.

Working on a project

If the Task work is accepted, the Task will be marked as completed on the Tasks page and your work will be completed!

You may also apply to future Tasks if they are available for volunteers to apply.



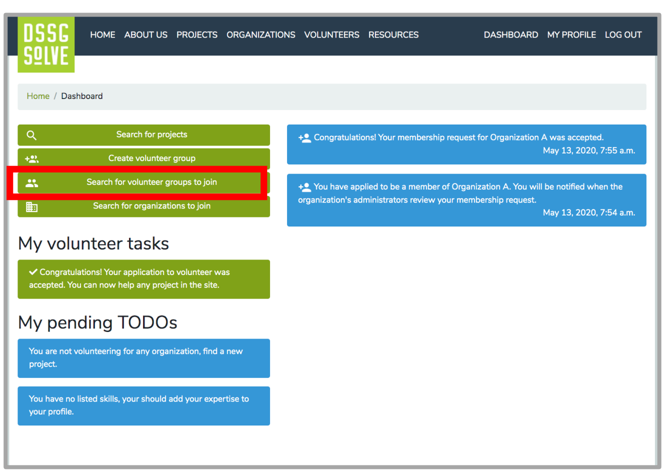


Working on a project

If you would like to continue doing work on that same project, return to the "Information" tab of the project. The "Project tasks" section on the bottom right side of the screen lists what other **Tasks** are open for volunteers to apply for.

If there are no open tasks available, you can click the "Follow project" button to be alerted about future opportunities.

If you would like to volunteer for a different Project, return to the Project page.



Note: The following steps outline how to create or join a volunteer group, which is *optional* for completing projects.

Creating a volunteer group

If you will be working with a volunteer group, you can create a group (or join an existing group) by pressing "Volunteer group" (or "Search for volunteer groups to join").

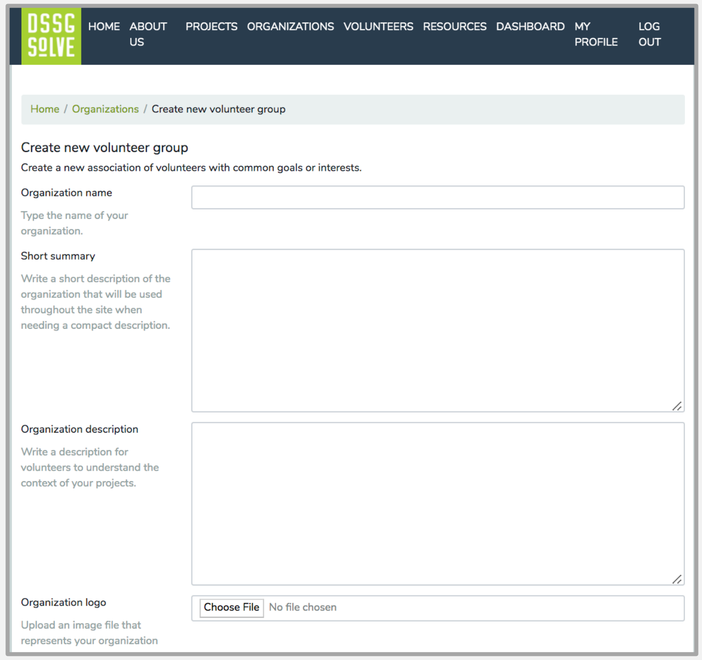
A volunteer group is a group of Solve volunteer members who share an interest in types of projects they would like to complete. By creating and joining volunteer groups, you will be able to easily find members to complete projects with.

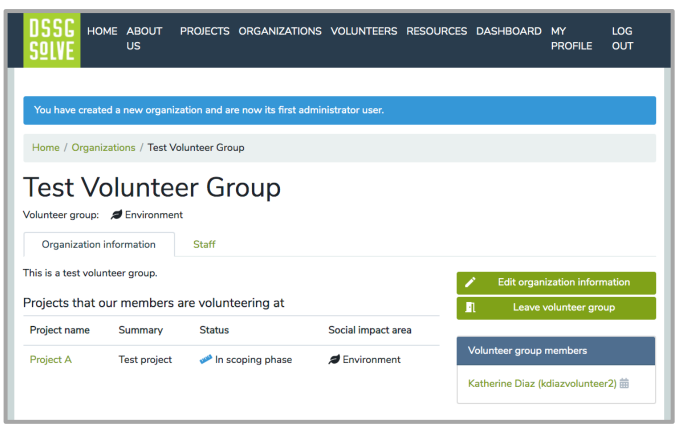
To join an existing group, skip to the step titled "Joining a volunteer group".

In the **Dashboard** view, you can create or join volunteer groups. Volunteer groups are useful for teams that will complete projects together and also as a way for volunteers that have similar interests to group themselves.

Fill out volunteer group info

Fill out all information regarding your volunteer group and click **Create Volunteer Group** at the bottom of the page.





Volunteer group view

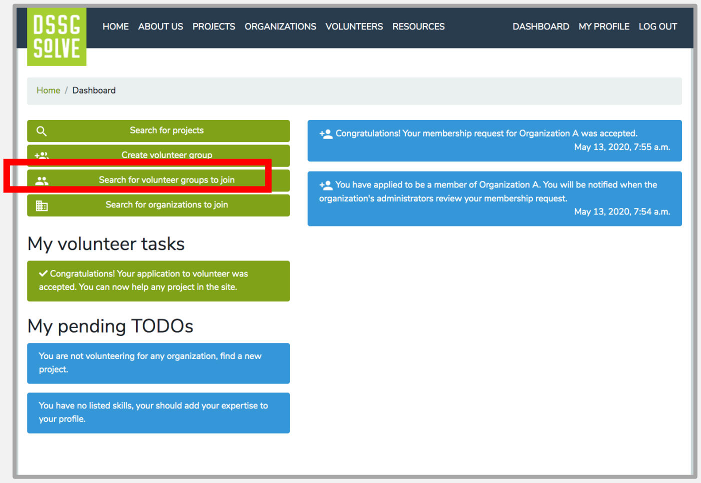
You will be redirected to your organization's volunteer group page. At any time, you can edit organization information, leave the volunteer group, or view the other members of your organization by clicking the **Staff** tab.

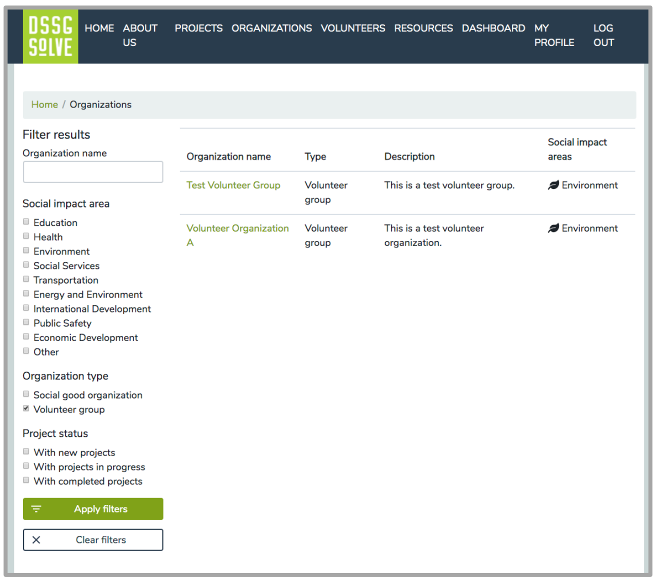
Note: You cannot manually invite other members to your volunteer group, they must request membership.

Joining a volunteer group

Press “Search for volunteer groups” to join.

You may also join an organization that is already created. To do so, return to your Dashboard and click on the **Search for volunteer groups to join** button on the left-hand side of the screen.





Join a volunteer group

Join a volunteer group by clicking on the volunteer group name.

On this page, all volunteer groups are listed in alphabetical order of the volunteer group name. This page allows you to filter for groups by the organization name, social impact area, organization type, or project status.

Join a volunteer group

To join the organization, press the green "Request membership" button.

You will be redirected to the volunteer group's page, where you can see the organization's information and the current members.