

How to Manage Standing Volunteer Roles

Standing Volunteer Roles are recurring, year-long positions — like Treasurer, Newsletter Editor, or Field Trip Coordinator — that your co-op needs filled every year. Unlike one-off volunteer slots tied to a specific event, standing roles represent the ongoing structure of your co-op. Admins define the roles; members claim them from their dashboard.

Standing Volunteer Roles — admin management page

Create a Standing Role

Only co-op admins can define standing roles.

1. In the admin portal, go to **Community → Volunteer Roles**.
2. Click **Add Role** in the top-right corner.
3. Fill in the role details:
 - **Name** — the role title members will see (e.g., *Field Trip Coordinator*)
 - **Description** — optional; a short summary of what the role involves
 - **Display Order** — lower numbers appear first in the member list
 - **Active** — leave checked to make the role visible and claimable by members
4. Click **Create Role**.

The role appears in the table immediately. Its status shows **Vacant** until a member claims it.

To edit a role later, click **Edit** in the row. To remove a role permanently, click **Delete** — note that filled roles cannot be deleted until released.

How Members Claim a Role

Members see the Standing Volunteer Roles card on their dashboard.

Member dashboard with Standing Volunteer Roles card

1. From the member portal, go to the **Dashboard**.
2. Find the **Standing Volunteer Roles** card.

3. Browse the list of vacant roles. Each role shows its name and description.
4. Click **Claim** next to the role you want to take on.

The card updates immediately to confirm the role and show the member as the current holder. A member can only hold one standing role at a time. If all roles are filled, the card says so and shows the option to suggest a new one.

To step down from a role, the member clicks **Give up this role** on their dashboard. The role returns to vacant and becomes available for another member to claim.

Suggest a New Role

If a member wants to volunteer in a way that isn't listed, they can suggest a new role:

1. From the **Standing Volunteer Roles** card on the dashboard, scroll to the **Suggest another role** field at the bottom.
2. Type a short description of the role (e.g., *Carpool coordinator*).
3. Click **Suggest**.

CooplyHQ records the suggestion. To act on it, create the role manually in the admin portal using the steps above.

Release a Role at Year-End

At the start of a new co-op year — or any time a member steps down and you need to reassign a role — release it from the admin portal:

1. Go to **Community → Volunteer Roles**.
2. Find the filled role in the table. The **Filled By** column shows the current holder.
3. Click **Release** next to their name.
4. Confirm when prompted.

The role status changes back to **Vacant**. Members can now claim it again from their dashboards.

To reset all roles at the start of a new year, release each filled role one at a time.

What's next

- Review your co-op membership roster: **How to Invite Families and Manage Your Member Directory**

- Set up recurring membership dues: **How to Set Up Membership Plans and Recurring Payments**
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