



STAFF GUIDE · GRADESPACE CHARITY

Running your charity's website: a guide for your team

Everything your team needs to run the website day to day, in plain words.

Gradespace Charity
for WordPress, version 0.1.1

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Contents

1. Signing in	3
2. Your daily start: Charity → Today	3
3. Campaigns	3
4. Donations	4
5. Volunteers	4
6. Shifts and the rota (Pro)	5
7. Events	5
8. Places	6
9. Services, stories and reports	6
10. Your charity's details	6
11. Newsletter	6
12. Records and privacy	7
13. Who can do what	7
14. Help	7

This guide covers the website day to day: campaigns and their totals, donations, volunteers and shifts, events, stories and the rest of the site. You don't need any technical knowledge.

Features marked **(Pro)** need a Pro or Agency licence.

1. Signing in

- Go to your website's address followed by **/wp-admin** (for example `yourcharity.org.uk/wp-admin`).
- Sign in with your own username and password. Please **don't share accounts**: the website records who did what, and each person should only see what their job needs.
- After signing in you go straight to **Charity → Today**.
- Forgotten your password? Click **Lost your password?** on the sign-in page. After 5 wrong passwords, sign-in pauses for 15 minutes.

2. Your daily start: Charity → Today

- **New volunteers** waiting for a call.
- **Shifts today and tomorrow** with how many places are taken (Pro).
- **Campaigns**: each open campaign's total and when it was last updated.
- **Stories to check with people again**, when a story's "check again by" date comes.
- **New messages** from the contact form, and (for administrators) records **due for review**.

The numbers on the left-hand menu show how many things are waiting.

3. Campaigns

Charity → Campaigns → Add campaign.

1. Give it a title and write the story: what the money is for, who it helps and why now. Add a photo (the featured image).
2. In **Target and total**, set the **target** (in pounds). Leave **Raised so far** empty until you want to show a total.
3. Set when it **opens** and **closes**, if it has dates. After the closing date it shows as closed by itself; "Open or closed" lets you keep it open or close it early.
4. Tick **Feature it in the appeal banner** for the one campaign that matters most this month: a slim strip appears above the pages that have the banner, with its live percentage.
5. In **Milestones, costs and questions**: one milestone per line, like `6000 | November and December evenings`. They tick themselves off as the total passes them. "Where the money goes" lines are like `Heating and lighting | 5 evenings a week | 9800`. Questions are `question | answer`.

Updating the total. Open the campaign, change **Raised so far** (and **Number of gifts** if you like) to what your donation provider's dashboard says, and click **Update**. The page shows "Total updated ..." with the time, so people know how fresh it is. The website never guesses a total: if the box is empty the page says the total is to come.

Recent gifts. Only for donors who ticked "show my name" on your provider's page: one per line, `name | amount | message | date` . Leave out anyone who chose to stay anonymous (or write Anonymous).

Updates. Charity → Campaign updates → Add: write the update, choose its campaign and publish. It appears on the campaign's timeline. With **Pro**, tick **Email it to supporters** and it goes once to everyone who asked for that campaign's updates and confirmed. Each email has a link to stop.

4. Donations

People always give on your **donation provider's own secure page** (JustGiving, Enthuse, CAF Donate, PayPal Giving Fund, Stripe Payment Links or another provider). Your website never sees or stores card or bank details, and Gift Aid is handled by the provider.

- **Charity → Settings → Donations:** choose your provider and paste your **donation page** (it must start with `https://` and be on the provider's own website). Set the amounts to offer, and whether you take monthly gifts.
- **Embedded form:** if your provider gives you a form to put on your page, paste its code under "Or the provider's own form, embedded". Only the provider's frame is kept. It's shown after the visitor allows other companies' content (cookies).
- **A campaign with its own page:** open the campaign and fill in **Donations** with that campaign's page on your provider.
- **What gifts do:** under Settings → Donations, one per line: `15 | 1 | week of food for one person | A bag chosen by the member.` Use real figures from your accounts. They appear on the donate panel and in "What your gift does".
- **Another provider:** choose "Another provider" and list its web addresses (for example `donate.example.org`).

5. Volunteers

Charity → Volunteers. Everyone who signed up on the website. Records are private: they're never published.

- Open a volunteer to see their details, the role and shifts they chose, their skills and when they're usually free.
- **Change the status** as you go: New → Contacted → Active (or Paused, or Left).

- **Add a note** after each call.
- **DBS check complete on:** if their role needs a check, note only the date it was completed. Never write down the certificate number or what it says (the website removes 12-digit numbers from notes anyway).
- **Email them their "my shifts" link** (Pro) if they've lost it.

Roles. Charity → Volunteer roles → Add: what the volunteer does, the time it takes, checks and training (for example "Food hygiene (we train)"), whether a **DBS check** is needed (only the wording is shown), the youngest age and the place. Untick **Looking for volunteers** to take it off the form.

Who gets the sign-ups. New volunteers are emailed to the addresses on Charity → Settings → Email → "Send volunteer sign-ups to". With **routing (Pro)**, each place's volunteers go to that place's coordinator instead (see section 8).

6. Shifts and the rota (Pro)

Charity → Shifts → Add shift: choose the role, the date, start and end times, the number of places and the place. Volunteers can then tick it on the sign-up form, or take it from their "my shifts" page.

- When a shift is **full**, people can join its **waiting list**. If someone cancels, the first person waiting gets the place and an email.
- Everyone with a place gets a **reminder the day before**, with a link to cancel. Volunteers can cancel online until the hours set under Settings → Shifts; after that they're asked to ring you.
- **Charity → Rota** shows the week's shifts with who is coming and who is waiting. Open a volunteer to give them a place, cancel a place, or mark who came.
- **Cancelling a whole shift:** open it and tick **Cancel this shift**. Everyone with a place (or waiting) is emailed.

My shifts. Each volunteer has their own page (the link is in their emails). They only ever see their own shifts there. If they lose the link, the My shifts page has "Email me my link".

7. Events

Charity → Events → Add event: the date and times, whether it repeats, where (one of your places, or other words), the kind of event, the price (for example "Free" or "£8 adults, under-16s free") and a booking link if tickets are on another site.

- **Sign-ups on the website:** tick **Take sign-ups here** (one-off events only), set the number of places (0 for no limit) and whether to show how many are coming. The list of who's coming is at the bottom of the event's edit screen. The website never takes more than the places you set.
- **Your calendar (Pro):** if you keep events in Google Calendar or Outlook, paste its iCal address under Settings → Events. Those events appear in your lists within the hour.

- People can **subscribe to your events calendar** from the events list.

8. Places

Charity → Places: your shops, hubs, food banks and offices. For each: the address, what it is, opening times (one per line), access notes, and the **coordinator's email**.

With **routing (Pro)**, the coordinator gets the volunteers for their place, changes to its shifts, and messages sent from the place's page.

9. Services, stories and reports

- **Services** (Charity → Services): what you do, who it's for, when and where (`Wed, Fri 10:00–13:00 | Kinwell Hall`), and how to start (drop in, book, refer).
- **Impact stories** (Charity → Impact stories): a story is only published once its **consent** is recorded: the date the person agreed and what they agreed to. Use a first name unless they asked for more; tick **Show an illustration** if they'd rather not have their photo shown. Set a "check again by" date if you'd like to ask them again later.
- **Annual reports** (Charity → Annual reports): the year, the headline figures (`48,210 | meals served | Up 21% on last year | 86`), income and spending lines from your accounts, the reserves note and the PDF. The website works out each line's share and "where each £1 went".
- **Documents:** reports, accounts, policies and minutes, with the file. Its type and size are shown automatically.

10. Your charity's details

Charity → Settings → Your charity: your regulator and registered charity number, the kind of company and the registered office, and your trustees (`name | role` , one per line). Your company number and registered name are on the **Business** tab. They're shown in every footer.

11. Newsletter

Charity → Settings → Newsletter: switch it on, choose your mailing provider (Mailchimp, Brevo and others), and paste either your provider's **form address** (from its "embedded form" code) or its embedded form. Your subscriber list stays with your provider; the website keeps none.

12. Records and privacy

- **Nothing is deleted automatically.** Volunteers who left or haven't done anything for a year (Settings → Records), and event sign-ups some months after the event, are listed under **Volunteers → Due for review**. An administrator ticks the ones there's no reason to keep and deletes them (typing DELETE to confirm).
- **When someone asks for their data:** Tools → **Export Personal Data** (or **Erase Personal Data**) with their email address. It covers their volunteer record and shifts, event sign-ups and campaign-update requests.

13. Who can do what

- **Administrators:** everything.
- **Volunteer coordinator:** volunteers, roles, shifts and the rota, event sign-ups and messages.
- **Fundraiser:** campaigns, their totals and updates, supporters, and the website's content.
- **Editors:** services, stories, events, reports and documents only.

Change this under **Charity → Staff access**.

14. Help

Email support@thegradespace.com with what you were doing, what you expected and a screenshot, and we'll help.