



Volunteer Management Systems and (virtual) cake

15 September 2020



@AdaptaforNFP



Adapta Consulting

We are:

- A specialist information systems consultancy
- We only work with membership organisations, charities, associations, trusts and others in the NfP sector
- We are completely supplier-independent
- Our consultants have held senior positions in a broad range of different organisations
- Our advice and guidance is based on practical experience gained over many years
- This is the first virtual “and cake” event, and feedback will be very welcome.
- ... apologies for the lack of cake...



Introductions



Programme

14:00: Welcome & Overview of the session

**14:05: Intro & Key Themes:
Volunteer Management & Lockdown Learning**

14:15: Case Studies

14:20 Royal Mencap Society

14:40 Trussell Trust

15:00 Christian Aid

15:20 Move into Breakout Rooms / Grab a coffee

15:25: Breakout Room Discussions & Sharing

15:55 Move back into Main Room

16:00: Close

Sharing beyond this event...



Rules of Engagement!

- The first rule of Virtual Cake Club...
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions after the speakers have presented.
- **If you have a question relating to the speaker presentations,** please submit these at any time using the Chat feature. Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.



Breakout sessions will all discuss:

1. Your #1 “Lockdown learning point” regarding volunteer management?
2. Has your team/organisation been able to adapt and respond to recent challenges?
3. How has the impact of Lockdown impacted your thinking or planning for the systems and processes you use to support volunteers?

Each group will have a member of the Adapta team who will facilitate the discussion and capture headline notes. Everyone will be returned to the main room for wrapping up.

During breakout sessions: To contribute you should raise your hand using the ‘Raise Hands’ feature. Unmute once you have been prompted to by the Facilitator.

How to raise your hand: Click on the icon labelled ‘Participants’.

Click on your name and select “Raise Hand”.

You may have to click the screen to access the menu.



Key Themes: Volunteer Management Systems

Prioritising more of your Lockdown learning and sharing



Volunteering has changed... and continues to

Society change - Many of us are volunteers in some way, and a volunteering ethos is growing in many communities, especially in recent months.

Expectations of Volunteers - Increased services and direct delivery.

Expectations from Volunteers - Engagement and digital comms.

Driving the development of Volunteer Management responsibilities in organisations, and the systems required to support the delivery of those responsibilities.

Do you need a Volunteer Management System?

Spreadsheets and Access databases will only take you so far.

As your number of volunteers increases, especially if you are managing different roles and rotas, you will likely need use software adapted to deliver Volunteer Management tasks.

More developed systems can also help improve the volunteering experience, aiding recruitment and retention, and can reduce the administrative burden on the organisation.

There are various ways organisations have developed systems to manage volunteering. We have some great examples of those differences in our case studies today.

Common Features: Volunteer Management Systems

| | |
|-----------------------------|---|
| Recruitment | Online application processes, saving the time spent on manual entry. Visitors can search for opportunities, role descriptions and locations. Screen and risk assess applicants. |
| Management | Organise contact information and history, including volunteer type, availability, training completed etc. Track hours offered and delivered. Risk assess roles and activities. |
| Communication | Develop Email, SMS, Social Media campaigns for volunteers, advertising engagements automating email reminders for upcoming volunteering sessions. Some systems can also automate recognition and reward when volunteers meet specific criteria. |
| Volunteer portals | Allow volunteers to sign into an organisation's site, inquire about opportunities, sign up for events and update details, opting in or out of particular communications. |
| Volunteer scheduling | Post upcoming volunteer needs with scheduling features. Prospective volunteers can then view opportunities and fill empty slots based on their availability. |

Volunteer Management System examples

There are many systems available, and the field is growing. Some popular recent examples we've seen in the sector include:

"Digital First" solutions

Born out of the Social Media age. Focus on recruiting and engaging/managing digitally. Flexible integrations to digitise processes between systems. Volunteers can access and input data online and via Apps.

Assemble (hearing more from Miranda at Trussell Trust)

Better Impact



Platform solutions

For maximum flexibility and the widest range of capabilities. Suppliers are offering some "out of the box" functionality for Volunteering, but also you can configure these Platform systems to deliver almost any process you want... with the obvious balance of increased time and cost!

Microsoft Dynamics (hearing more from Christian Aid)

Salesforce (Volunteers for Salesforce)



Adapted/Developed systems

Some organisations have adapted existing core systems such as their CRM or HR system, to also manage volunteers. This can require compromise over what can be recorded, and which processes can be delivered. We've seen recent examples of organisations adapting and developing:

Charity Log

Thankq

Donorflex

Eploy (we'll hear about this experience from Mencap shortly)



Sistemas GRATIS!

There are also **free tools** available for recruiting volunteers for events such as www.signup.com and <https://trello.com/inspiration/event-planning>.

These free solutions can be great for trying out new ways of working but minimising risk or cost.



Before lockdown...

This is what you told us about why you were attending this event...

Survey Responses:

Main reason for attending

Gold: Benchmark ways of working against peers

Silver: Actively looking for a new system

Bronze: Learn how we can get more from our current system

... a significant minority not happy with current system

Survey Responses:

Core functions of your current system

Gold: Management (shifts, support, issues)

Silver: Recruitment and on-boarding

Bronze: Safeguarding

... with Training close behind



**CHANGE
AHEAD**

Since Lockdown...

Many organisations have had to manage significant change to events and other volunteering activities over the past few months.

You have kindly shared some of your experiences and learning, and I'm going to share a small selection of those.

A local charity supporting older people



Inductions are now held online, and Zoom is used for all Volunteer interviews.

Now running regular online volunteer get togethers. Sharing updates about the charity, discussing any concerns about volunteering, and time for a general chat and playing games.

Ran a Calling Programme during Lockdown to contact as many volunteers as possible on the phone to check-in with them.

First ever Recruitment Freeze! Driven by an initial surge in volunteer applications and existing volunteers taking on more tasks and responsibilities.

Continued fortnightly bulletin emails which volunteers' really value, and the quarterly newsletter which has a volunteer spotlight feature.

Introduced volunteer awards which will be launched at the next AGM.

An international development charity

Lockdown hit right before the busiest period of the year; with activities requiring thousands of volunteers helping with a range of tasks, from delivering cakes to running street collections.



**CHANGE
IS GOOD.
You go
first!**

Delivered a “Controlled Stop” for all activities. Ensuring we safeguarded volunteers and staff during a period of mixed messages and an ever-changing landscape and circulated accurate guidance.

Continued to engage volunteers, ensuring they were emotionally well. Most of our volunteers are young (16-25) and we were very aware of possible issues around mental health and well-being. We shared referral organisation details and also asked the Volunteer supervisors to individually check on volunteers. We also started group zoom meetings and Facebook live sessions for volunteers.

Fundraising physical activities did not take place. Instead volunteers set up their own virtual pages and found creative ways to engage their communities to give.

Monthly accredited training sessions were delivered online via Zoom, with usual 6-8-hours condensed. Learning how to run Breakout rooms, manage poor connections and losing people mid-session! Found new games and icebreakers that were played online.

A national health charity



Adapted and changed how we manage and support our volunteers, particularly as a number of roles have been put on hold as we cannot involve volunteers in the community or in our office which is closed at this time.

Created online/digital activities to engage volunteers. Connected with volunteers through online conferencing platforms such as Zoom/GoToWebinar to offer support and manage their volunteering, including inductions and training.

Many of our roles previously offered remote support but we have improved how we communicate and check-in with volunteers using online platforms rather than phone calls. Makes it a much more personable experience.

Organised social, online get-togethers to help create a volunteer community feel and these have been successful as no travel involved, which usually limits who can attend our face-to-face ones. It has also helped with welcoming new volunteers, so they get the opportunity to meet others.

Arranged staff meet & greet online sessions so volunteers still receive a warm welcome to the charity, where otherwise they would meet in person.

A national learning disabilities charity

A yellow circular graphic with the text "CHANGE IS GOOD." in large, bold, black capital letters. Below it, the text "You go first!" is written in a smaller, black, sans-serif font, slanted upwards to the right.

Volunteering has had to adapt to ensure we can still deliver project work, befriending projects and to support our retail stores to re-open.

We have started online inductions and GDPR training for volunteers who will be moving into a volunteer retail assistant roles. This has helped with a huge recruitment drive, due to many existing volunteers wanting to take a break until the new year.

This has meant we are not running group or 1:1 inductions in the store and has meant we can have up to ten volunteers per session and cover the 30 stores we have. Moving inductions online means we can maintain social distance rules and not take someone off the shop the floor.

Befriending projects have moved to use online engagement. Zoom coffee mornings have been popular and have meant both volunteers and beneficiaries of the projects have remained engaged.

Our project “Gig Buddies” is about reducing social isolation for young people with a learning disability and getting people out and about through being matched with a volunteer. The approach to this project has had to completely change. Overview:

https://www.connectioncoalition.org.uk/buddies_beating_loneliness_in_lockdown

What's next?

“Going forward, our **main training programme is now a mixture of online and in-person**, and we as an organisation and our volunteers are now **much more confident operating digitally** online. However, it will never take away from being together in person, and the **important social aspect that volunteering brings to people's lives**”.

“We plan to **keep all of our online engagement activities** when we resume to ‘normal’ volunteering activities, and **by developing new digital roles we have engaged with new audiences**”.



Case Studies

Mencap: Trent & Sam

Trussell Trust: Miranda

Christian Aid: Stacy & Rachel



**The voice of
learning disability**

Eploy

Effective vs Efficient

How Mencap has adapted their employee on-line recruitment platform for volunteers; what works well and the challenges it brings.

Can one size fit all?

Navigation: @ Dashboards Live Vacancies View Admin Reports History Favourites Support Centre

DO NOT USE - Volunteer Workflow: Test Sidekick JS onboarding demo (ID: 16290) (Ref: V JS 16290)

Tools: Up New Email / SMS Doc Merge Print Multi-Edit Calendar Other Roles

Filters: Candidate Type: All Contacted State: All CV Sent: All Suitability: All Status Type: Active Status: All

Actions: Filter Applications Query Builder Clear

| To Review (1) | Hiring Manager Shortlist (1) | First Interview (1) | First interview |
|---|---|--|-----------------|
| <div><p>Trent Testing</p><p>☆☆☆☆☆</p><p>Test Sidekick JS onboar... 4058-Tewkesbury Regist...</p><p>WEBSITE APPLICATI...</p><p>0/1</p></div> | <div><p>Jentest Stonetest</p><p>☆☆☆☆☆</p><p>Test Sidekick JS onboar... 4058-Tewkesbury Regis...</p><p>HIRING MANAGER F...</p><p>0/1</p></div> | <div><p>Alex Testing</p><p>☆☆☆☆☆</p><p>Test Sidekick JS onboar... 4058-Tewkesbury Regis...</p><p>CREATE ACTION</p><p>0/1</p></div> | |

How we use Eploy



The Good!



indeed

123

The Not-So-Good!



Going Forward Our Next Steps





**The voice of
learning disability**



Volunteer management system – Assemble

Miranda Beebe, Head of Volunteer Management

A LITTLE BIT ABOUT US

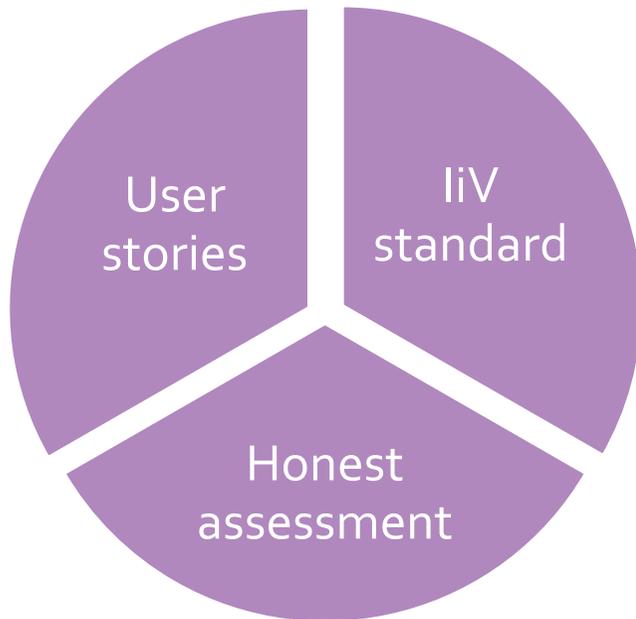
- Anti-poverty charity
- Running for 23 years
- 1,200 food banks
- 28,000 volunteers
- Franchise set up



Our **aim for food banks**: empower excellence in volunteer management

Food banks aims for their volunteers: to offer a streamlined, consistent process to their volunteers.

OUR PROCESS



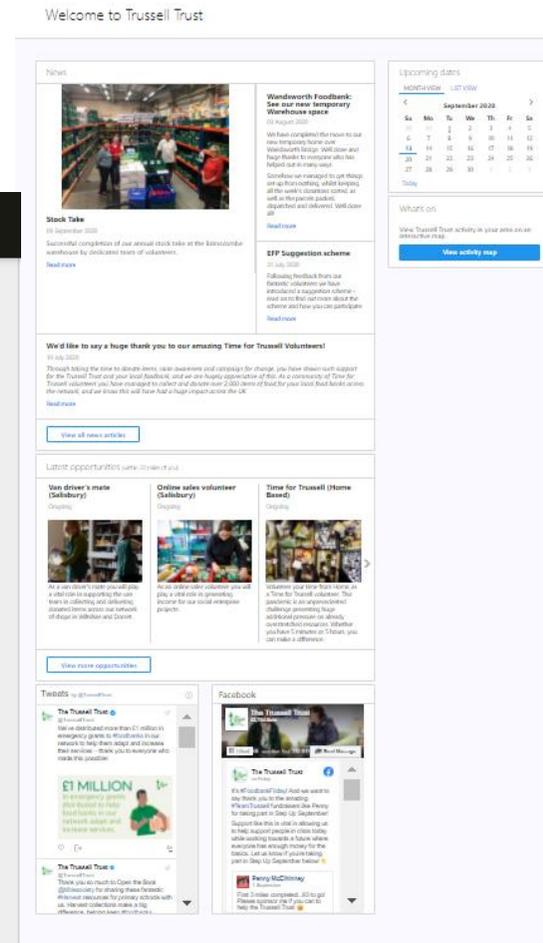
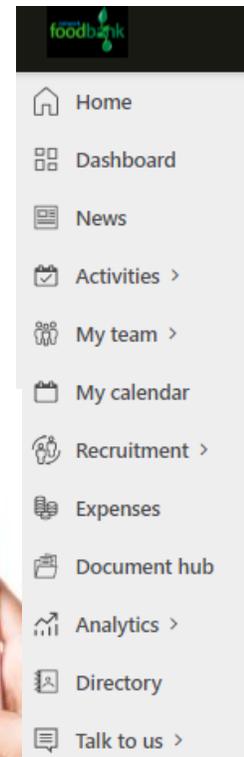
1. **User stories** Trussell Trust senior management, staff and volunteer. Food bank Trustees, Project Managers, Supervisors and volunteers
2. **Investing in Volunteering standard** as a reference point
3. **Honest assessment** strengths, weaknesses, resources, risk.



ASSEMBLE

ROLL OUT (in a covid filled world)

- Plan early, plan twice
- Experience is the teacher of all things
- Nothing can stop passionate people



RECOMMENDATIONS

- Understand your aims - MoSCoW
- Keep expectations realistic
- Make it part of daily working
- Maintain strong communications
- Keep measurables realistic



Microsoft Dynamics CRM



Who are we?



Poverty

We reach those most in need, in some of the hardest to reach places around the world.



Power

We challenge the systemic and structural causes of poverty by holding those in power to account.



Prophetic Voice

We speak truth to power and build local and collective agency.

Who are we?

- Office volunteers
- Community volunteers
- Fundraising volunteers
- Event volunteers
- Virtual volunteers



Ascent volunteer form

Contact View Supporter View **Volunteer View**

Volunteer Details Financial Analysis Multiplier Activities Summary

Driving Licence ?
Own Car ?

Volunteer Skills

- Finance
- Fundraising - Community
- Fundraising - Marketing

Volunteer Languages

- English
- French
- German

Volunteer Interests

- Campaigning
- Children's Work
- Debt

Country of Interest

-
- Afghanistan
- Angola

Region of Interest

-
- Africa - Central
- Africa - East and Horn

- General information
- Need to click through from main record to see they volunteer
- Linked roles and activities below
- Interest recording limited to volunteers only

Activities (Volunteer)
Volunteer Soft Credits
Volunteer Roles
Platform2

| Contact | Volunteer Role | Owner | Start Date | End Date |
|------------------------|-----------------|------------|------------|----------|
| C12, Mr [redacted] man | Speaker | Abi Bryan | 01/01/2005 | |
| C12, Mr [redacted] man | Media Volunteer | Jill Stone | 01/05/2005 | |

Ascent volunteer role form

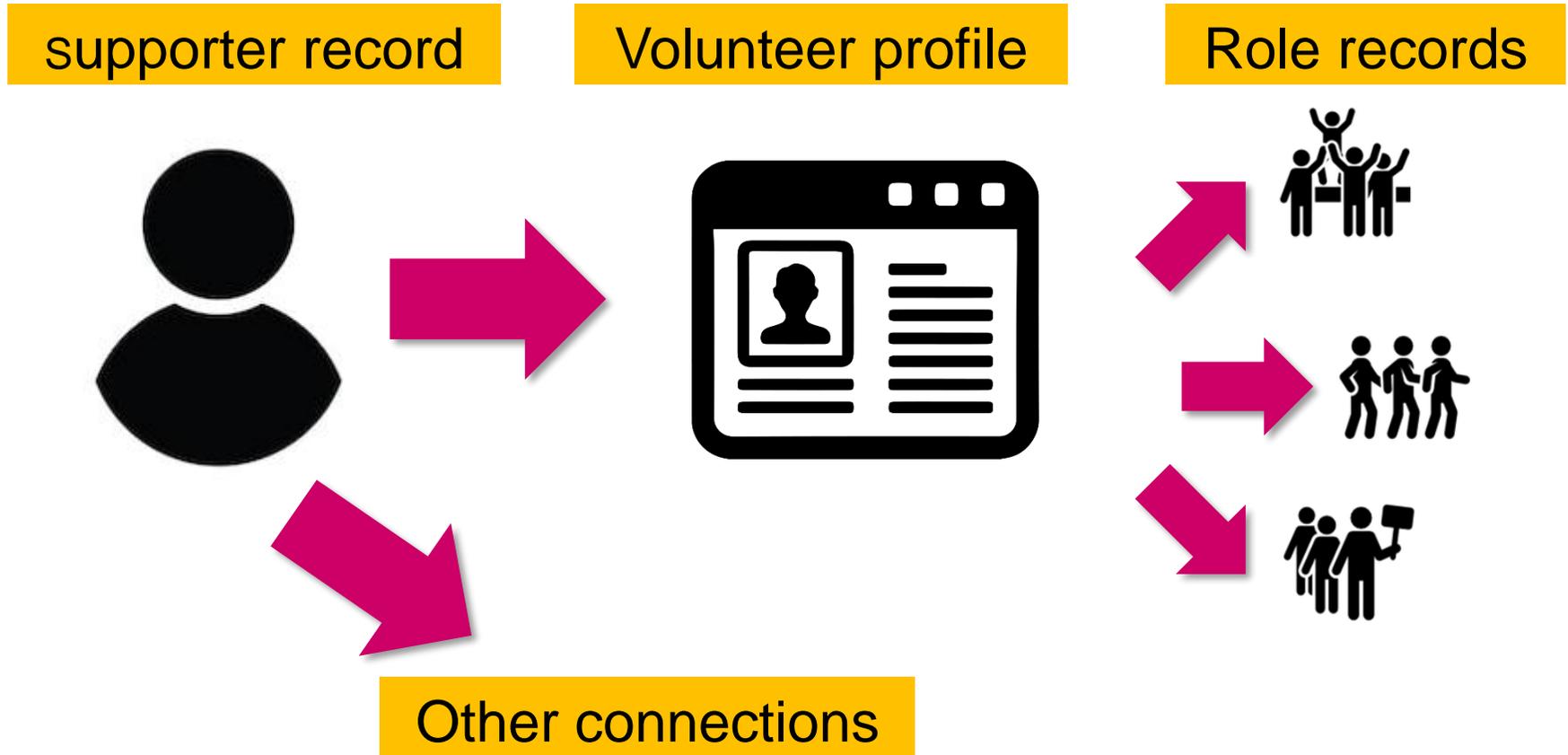
Contact Volunteer Role

| | | |
|--|---|--|
| <p>Contact</p> <p>C12, Mr man</p> <p>Volunteer Role</p> <p>Speaker</p> <p>Start Date</p> <p>01/01/2005</p> <p>End Date</p> | <p>Volunteer Agreement Status</p> <p>Active</p> <p>Volunteer Agreement Date</p> <p>10/01/2005</p> <p>Disclosure and Barring Service Status</p> <p>Active</p> <p>Disclosure and Barring Service Date</p> <p>13/09/2008</p> | <p>Availability</p> <p><input type="checkbox"/> Monday (am)</p> <p><input type="checkbox"/> Monday (pm)</p> <p><input type="checkbox"/> Monday (Evening)</p> <p><input type="checkbox"/> Tuesday (am)</p> <p><input type="checkbox"/> Tuesday (pm)</p> <p><input type="checkbox"/> Tuesday (Evening)</p> <p><input type="checkbox"/> Wednesday (am)</p> <p><input type="checkbox"/> Wednesday (pm)</p> <p><input type="checkbox"/> Wednesday (Evening)</p> <p><input type="checkbox"/> Thursday (am)</p> <p><input type="checkbox"/> Thursday (pm)</p> <p><input type="checkbox"/> Thursday (Evening)</p> <p><input type="checkbox"/> Friday (am)</p> <p><input type="checkbox"/> Friday (pm)</p> <p><input type="checkbox"/> Friday (Evening)</p> <p><input type="checkbox"/> Saturday (am)</p> <p><input type="checkbox"/> Saturday (pm)</p> <p><input type="checkbox"/> Saturday (Evening)</p> <p><input type="checkbox"/> Sunday (am)</p> <p><input type="checkbox"/> Sunday (pm)</p> <p><input type="checkbox"/> Sunday (Evening)</p> |
|--|---|--|

| |
|--|
| <p>Staff Contact</p> <p>John Cooper</p> <p>Recruitment Event</p> |
|--|

- Isolated record, not linked to overarching volunteer data
- Criminal record and availability against each role – repeat inputting

How it works...



Dynamics visibility

The screenshot displays a Dynamics CRM contact record for Pusskin Pebbles Vincent. The contact is identified as a 'Supporter Id' with ID C3952391 and is owned by the 'CRMUK Data Owner Team'. The contact's status is 'Active'. The record is categorized as a 'Donor Group' with a 'Status Reason'.

The 'Summary' tab is active, showing the following details:

- Name: Pusskin Pebbles Vincent
- Title: Miss
- Initials: P P
- First Name: Pusskin Pebbles
- Last Name: Vincent
- Post Nominal: MBE Msc
- Professional Title: Archbishop
- Professional Location: Canterbury

The 'Volunteer Roles' section displays a table of roles:

| Name | Volunteer Details | Volunteering Role | On behalf of |
|------------------------|------------------------|-------------------------|--------------|
| Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Christian Aid Teacher | --- |
| Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Christian Aid Treasurer | --- |
| Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | IT Volunteer | --- |
| Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Organiser | --- |

The 'Connections' section is visible at the bottom right, with a 'Refresh' button.

- Immediately visible that she's a volunteer
- Volunteer table has links to the varied volunteer records

Dynamics Volunteer Details

Pusskin Pebbles Vincent
Volunteer Details

Pusskin Pebbles Vincent | Active
Supporter | Volunteer Status

BPF: Volunteer Journey
Active for 16 months

Potential Volunteer/New ... | Assign Role (< 1 Min) | Risk Assessment And Parental Consent

General | **Availability** | Volunteer Roles | **Competence** | **Emergency Contact** | Ascent Reference | Related

| | | | |
|------------------------------|-----------------|---------------------------------|---|
| Current Status | | Recruitment | |
| Volunteer Status | Active | Recruitment Source * | A021598/S - Clergy Visits 2015 - Follo... |
| Owner | * Penny Martin | Recruited by | Rachel Vincent |
| Criminal Record Check | | Reasons for Volunteering | |
| Level Requested | Standard | To gain new skills | <input type="checkbox"/> |
| Status | Received | To live out my faith | <input type="checkbox"/> |
| Date Received | 13/05/2019 | To use/develop existing skills | <input checked="" type="checkbox"/> |
| Date Requested | 02/05/2019 | To help my church | <input type="checkbox"/> |
| Expiry Date (UK) | 13/05/2022 | To give something back | <input type="checkbox"/> |
| | | To make good use of my time | <input checked="" type="checkbox"/> |
| | | Inspired by work of | <input checked="" type="checkbox"/> |

- Overarching record with data relevant to all roles
- New functionality around recording skills

Managed Onboarding

Pusskin Pebbles Vincent - Christian Aid Teacher
Volunteer Role

Rachel Vincent | Yes
Owner | Is Current

BPF: Volunteer Journey
Active for 16 months

Interview And Referen... (< 1 Min) | Criminal Record Check | Update Role Status

Active for less than one minute

| | | |
|----------------------------------|---------------------|---|
| ✓ Interview Date | 01/05/2019 | 📅 |
| ✓ Interview Result | * Passed | |
| ✓ Reference One | * Received - Passed | |
| ✓ Reference Two | * Requested | ▾ |
| ✓ Criminal Record Check Required | * Standard | |

Next Stage >

Volunteer Role Details

Volunteering Role * 🇬🇧 Christian Aid

CA Week

CA Group ---

Church ---

Volunteer Role Management

Owner * 🟢 👤 Rachel Vincent

CA Area * 🇬🇧 Christian Aid - Loughborough Office

Volunteering Level 🟢 Agreement Plus

Volunteer Agreement Status Active

Agreement Issued Date 14/05/2019 📅

Today 14/09/2020 📅

- ▶ Adaptive Business Process Flow ensures that volunteers go through suitable steps for their role
- ▶ Ability to analyse pinch points in the onboarding process

Greater clarity

| Criminal Record Check | |
|--|--|
| 🔒 Criminal Record Check Level Requested | Standard |
| 🔒 Criminal Record Check Date Requested | 02/05/2019  |
| 🔒 Status | Received |
| 🔒 Criminal Record Check Date Received | 13/05/2019  |
| 🔒 Criminal Record Check Expiry Date | |
| 🔒 Criminal Record Check Valid For Us | |

- ▶ Key data from other entities visible on the Volunteer Role record, reducing double inputting of Ascent
- ▶ Able to have different staff members managing the volunteer for their different roles

| General | Availability | <u>Volunteer Roles</u> | Competence | Emergency Contact | Ascent Reference | Related | | |
|--|------------------------|------------------------|-------------------------|-------------------|------------------|---------------|----------------|------------------|
| + New Volunteer Role ↻ Refresh ⋮ | | | | | | | | |
| ✓ | Name | Volunteer Details | Volunteering Role | On behalf of | Role Start | Role End D... | Status Reas... | Owner |
| | Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Christian Aid Teacher | --- | 15/05/2019 | --- | Active | ✔ Rachel Vincent |
| | Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Christian Aid Treasurer | --- | 24/06/2019 | --- | Active | ✔ Ian Collier |
| | Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | IT Volunteer | --- | 04/09/2018 | --- | Active | ✔ Rachel Vincent |
| | Pusskin Pebbles Vincen | Pusskin Pebbles Vincen | Organiser | --- | 01/05/2019 | --- | Active | ○ Jeremy Gowers |

Volunteer Portal



Welcome to the Christian Aid Volunteer Portal

We're delighted that you've chosen to contribute your time and skills to Christian Aid's work.

- Automated invitation to secure portal
- Different access levels based upon role
- Live feed into Dynamics

Volunteer Portal

Assembly about climate change
Volunteer Hours · CA Volunteer Hours V2

General Related

| | |
|---------------------------|---|
| Volunteer | * Pusskin Pebbles Vincent |
| Volunteer Role | * Pusskin Pebbles Vincent - Christian Aid Teac... |
| Organisation | Abberley Hall |
| Subject | * Assembly about climate change |
| Regarding | * A003709/S - Climate Change £2 Big Issue |
| Appointment Activity Type | * Meeting - Other |
| Created from Portal | Yes |

Description
Used GN resources. delivered to 120 students. Went well.

Volunteer Role *
Pusskin Pebbles Vincent - Christian Aid Teacher

Subject *
Enter a brief description of the activity you carried out during these hours.
Assembly about climate change

Organisation
Please tell us which organisation (Christian Aid office, school, church, etc.) you were doing your volunteering activity at. We recommend you search by postcode.
Abberley Hall

Appointment Activity Type *
Meeting - Other

Actual Start *
Edit the default date and time, or use the calendar to select a date, then the clock icon to enter a time.
03/09/2020 09:30

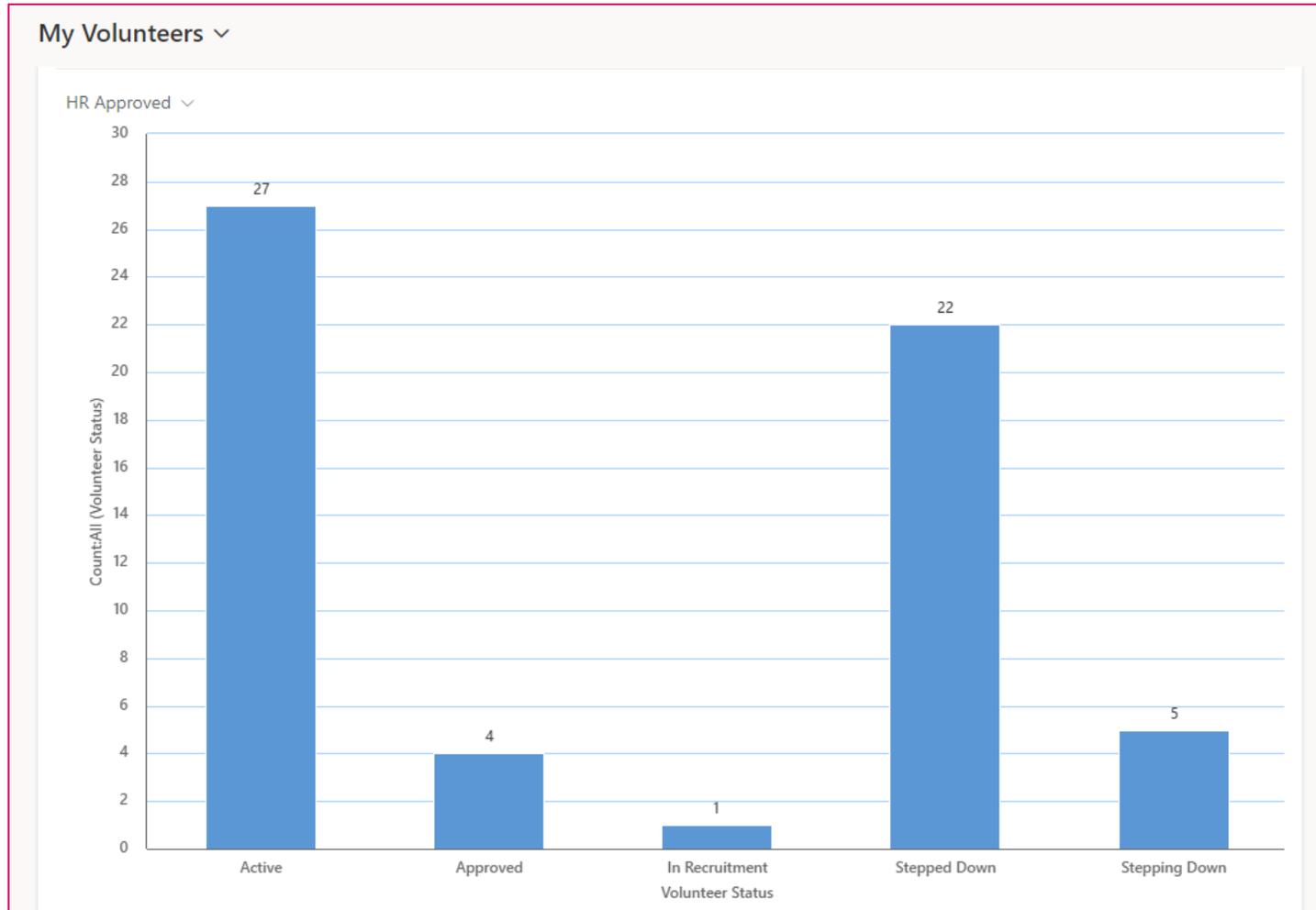
Actual End *
Actual end time of the activity.
03/09/2020 10:30

Actual Duration *
Select the approximate number of hours you spent on this activity. This should include preparation and travel time as well as the event itself.
3 hours

Description
Used GN resources. delivered to 120 students. Went well.

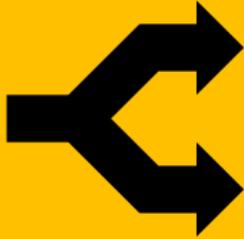
➡ Volunteers report their activities into Dynamics direct

Dashboards



Other features...

**Case management
and queues**



**Reminders
(e.g., DBS expiry)**



On-the-go app



**Volunteer-Supervisor
messaging**



**Contact preferences
and subscriptions**



**More development
to come...**



Thank you

Any questions?

The Christian Aid logo is presented as a white arrow pointing to the right, tilted slightly upwards. The word "christian" is written in a smaller, red, lowercase sans-serif font, and the word "aid" is written in a larger, bold, red, lowercase sans-serif font, both contained within the white arrow shape.

Stacy Cannon
UK Volunteering Manager
scannon@christian-aid.org

Rachel Vincent
CRM Project Analyst
rvincent@christian-aid.org

Christian Aid is a member of

actalliance

GRAB A COFFEE before Breakouts

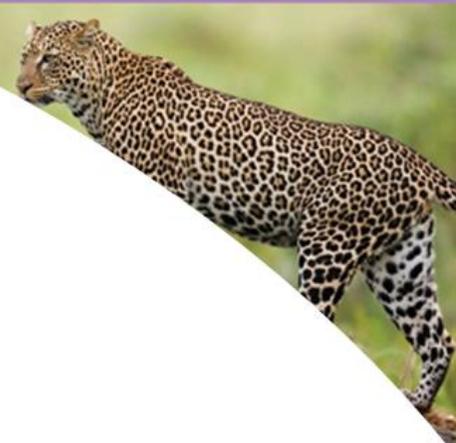


Breakout Room Discussions



1. What is your #1 “Lockdown learning point” regarding volunteer management?
2. Has your team/organisation been able to adapt and respond to recent challenges?
3. How has the impact of Lockdown impacted your thinking/planning for the systems and processes you use to support volunteers?

Re-convene for (quick!) feedback from each group.



Thanks & Goodbye!

Upcoming events...

30th Sept: Accounting & Cake 🍰

www.adaptaconsulting.co.uk/adapta-events