

Volunteer Experience Programme – Compass update

Advice to support County¹ Transformation Leads in ensuring that Compass data is fully readied for transition to the new membership system.

The ask

It is very important that Compass is fully ready for the transition of every Group, District² and County. This will smooth the transition process and lead to many fewer puzzled volunteers after the transition has happened for each of them.

This readiness process

Counties are asked to work on the seven topics listed below. If you're a Transformation Lead, we're not expecting you to do the tasks listed below yourself. Instead, please take the lead by finding and encouraging the right people in your County, its Districts and their Groups to make the changes. Changes in Groups may, of course, be best orchestrated by Districts.

The action topics listed in this guidance are:

- A) Confirming that every volunteer's personal details are up to date on Compass
- B) (As a part of (A)) Rationalising email addresses
- C) (As a part of (A)) Rationalising telephone numbers
- D) Updating volunteers' roles and training
- E) Closing Occasional Helper/PVG-only "roles" that are no longer required
- F) Updating section/ASU organisation records
- G) Correcting 'other' sections

Appendices

There are two Appendices to this document.

Appendix 1 shows data fields in Compass that relate to items (B), (C), (F) above

Appendix 2 is a one-page guide that can be given to volunteers in your County and particularly highlights actions required regarding email addresses and telephone numbers.

Thank you

Thank you for your help in leading this important part of our transition preparation.

¹ We use the word County throughout this document, but it should be taken to mean whichever of the terms Area, Bailiwick, Branch, County, Island, Region(Scotland) is appropriate to your location.

² We recognise that several Counties have no Districts. The ask in this document remains largely unchanged in those cases, but please contact your Change Manager if you have any questions.

A) Confirming that every volunteer's key personal details are up to date on Compass

The ask

Our aim in this work is to be sure that the personal data held on Compass for each of our volunteers (including OHs/PVG-only) is as accurate as possible prior to the transition.

The reason

There are many errors in our volunteers' personal data held on Compass. Incorrect addresses/post codes, email addresses and phone numbers are just two examples. Some of these inconsistencies have existed for several years and several pre-date Compass.

As ever, databases are only as useful as the data contained within them, so the planning for this transition to the new digital system presents a one-off opportunity to improve the accuracy of our member databases.

Notes

1. We understand that some of the inaccurate personal data recorded on Compass may have originated on system that existed before Compass.

There will be some opportunity to rectify inaccurate data on the new system but now is a great opportunity to update Compass prior to the actual transition so that volunteers see their correct data when they logon to the new system.

2. The personal data referred to in this topic is the information held on each volunteer's PERSONAL DETAILS tab on their Compass record (but note also action points (B) and (C) in this document),
3. You will know the best way forward to achieve this across your County.

Recognising that very many volunteers will never have logged-on to their Compass record, one practical suggestion is to ask an administrator in each Group, District or County to have a brief meeting with volunteers (including OHs/PVG-only) to show them [online if possible] their PERSONAL DETAILS record. Any errors or inconsistencies can be noted and corrected by the administrator (though some changes may need to be referred to the Information Centre). For members of a Section Leadership Team, for example, this action could be quite easily done with the whole team at the end of a section meeting.

4. When editing the PERSONAL DETAILS tab there are two fields that are mandatory - Ethnicity and Faith/Religion. Compass won't save updates to the PERSONAL DETAILS page unless these fields are filled in. This is because it's really important that we bring the huge benefits of Scouting to all communities, and to track our progress we need to collect some basic data on our membership. This information will be carried over to the new membership system. Please help us out by filling in this information if you are on that page of Compass. For both of the fields there is a 'Prefer not to say' option that the volunteer can use if that is their preference

B) Rationalising email addresses

The ask

Prepare for the changed use of email addresses in the new system. Note (see Appendix 1) that Compass enables a volunteer to declare up to 3 email addresses, but the new system will offer only 2 email addresses, each of which has a very specific purpose – a **username** email address, and a **communications** email address. We therefore need to make sure that the email addresses that need to be transitioned are clear, accurate and working on Compass.

Transformation Leads are asked to strongly encourage all volunteers to check that their email addresses are current and correct on Compass. This is a part of task A in this guidance document.

The reasons

In the new system, email addresses will be used in two ways:

- As the username for logon to the digital system
- As the address to which communications will be sent.

In this task – see (1) below – it will be particularly important to check the validity of the email addresses that will be transitioned over to the new system.

Note that there are many undeliverable email addresses recorded on Compass. To support the transitioning of email addresses to our new system it will be particularly important to confirm that the one or two email addresses that will be transitioned to the new system for each volunteer are 'valid' email addresses.

Notes

1. Preparing for the email addresses required on the new digital system

As noted above, there are two considerations here – the email address that will be used as the volunteer's **username** to logon to the new system through their Single Sign On (SSO) process and the email address that will be used by the new system as the volunteer's **communications** email address.

a) **Username** email address

The 'username' email address for each volunteer must be personal and unique and working. [Personal = john.smith@... rather than gsl@...; unique means that the same email address is only used as logon username by one person; working means that it is not 'undeliverable' and is regularly accessed.]

How will email addresses transition to the **username** field in the new system?

- If the volunteer has only one email address showing on Compass, that will be used as username for the new system.

- If the volunteer has more than one email address showing on Compass, then the preferred email address should be marked as the 'volunteering' email address on Compass and that will be used as username for the new system.
- If the volunteer has zero, or more than one, email address marked as 'volunteering' then the email address marked as Primary will be used as username for the new system.

Note: to assist their work, Transformation Leads will be sent a list of duplicate logons, and a list of volunteers with blank/no email.

Also, prior to transition each user will be emailed to say which of their email addresses will be being used as their username for the new system. They will create their new passwords as part of their first logon to the new system.

b) **Communications** email address

This 'communications' email address must be working (i.e., not undeliverable).

How will email addresses transition to the **communications** field in the new system?

- If the volunteer has only one email address showing on Compass, that will be used as their communications email address on the new system.
- If the volunteer has more than one email address showing on Compass, then their preferred communications email address should be marked as the 'scouting enquiries' email address on Compass and that will be used as communications email address on the new system.
- If the volunteer has zero, or more than one, email address marked as 'scouting enquiries' then the email address marked as Primary will be used as communications email address for the new system.

Appendix 2 to this document has been written for Transformation Leads and others as a guidance sheet that can be passed to volunteers so that they can update their own email and phone preferences in readiness for the new system.

C) Rationalising telephone numbers

The ask.

Compass enables a volunteer to declare up to 3 telephone numbers, but the new system will offer only 2 phone numbers – a **Preferred** number and an **Alternate** number.

Transformation Leads are asked to strongly encourage all volunteers to check that their phone numbers are current and correct on Compass. This is a part of task (A) in this guidance document.

If they have more than one telephone number recorded on Compass, volunteers are asked to decide which is their **Preferred** number going forward and which should be their **Alternate** number.

Note

How will telephone numbers transition to the new system?

- If the volunteer has no phone numbers listed on Compass, both their **Preferred** number and their **Alternate** number will be 'empty' on the new membership system. For volunteers currently showing no phone numbers on Compass, it would be helpful for them to add at least one phone number to their Compass PERSONAL DETAILS.
- If the volunteer has only one phone number showing on Compass, that will be used as their **Preferred** number on the new membership system, and the **Alternate** number will be 'empty'.
- If the volunteer has more than one phone number showing on Compass, then their chosen **preferred** phone number should be marked as the 'scouting enquiries' phone number and their chosen **alternate** number marked as 'volunteering' on Compass, ready for transition to the new membership system.
- If the volunteer has zero, or more than one, phone number marked as 'scouting enquiries' on Compass, then the phone number marked as Primary will be used as **Preferred** for the new membership system, and the Alternate number will be 'empty'.

D) Updating volunteers' recorded roles and training

The ask

Make sure that each volunteer's record on Compass lists all their active (and historic) roles (i.e. the roles that they are currently undertaking, as well as all that they have previously held).

Make sure that all completed training (including mandatory on-going training) for all volunteers is recorded and up to date on Compass by the time of transition to our new membership system.

The reason

It's important that all active (and historic) roles and all training (including mandatory ongoing learning) is properly transitioned over to the new membership system so that each volunteer's record is seen as being as accurate as possible when each logs on to the new membership system for the first time. In the Compass transition some years ago, there was significant angst amongst volunteers because their roles and/or training were not properly transitioned. Although that was in part because of the format of the MMS database (the Compass predecessor), we want to ensure that roles and training are transitioned to the new membership system as well as possible. The movement's general familiarity with Compass means that this updating task will be easier to complete on Compass.

Notes

1. Please ask GSLs, DCs and their teams to make sure that all volunteers' current roles are accurately recorded on Compass. Please close roles which are no longer active, including inactive Active Support Unit members.
2. Please also add roles where this will help the transition process, particularly where a current role is showing more than one variant.
For example, if a person's Section Assistant role shows as Section Assistant – Cub Scout, Scout (because the volunteer is working with both sections), please 'close' one of the variants, but also add a new Section Assistant role for the other variant so that there is one role per section that the volunteer works with.
3. Some roles are particularly unclear and will cause issues at transfer. For example, there are 1,872 'Group Section Assistants' recorded on Compass. In reality each of those should be a Section Assistant with a specific section (or more than one section if appropriate) rather than with the Group.
4. As part of this task, please make sure that every nominated/elected/co-opted current member of every Trustee Board (Group, District and County) is recorded on Compass. This should include every Section Leader who has opted-in to the Group Trustee Board as an ex officio Trustee.

E) Closing Occasional Helper (OH)/PVG-only “roles” that are no longer required

The ask

We’re asking you to start closing all OH (including PVG-only in Scotland) roles locally, except where there’s a known need to keep them. Examples of where there is a specific need to keep an OH/PVG-only role may be where there’s a Group family camp coming up, or an event that parents/carers have agreed to support where they’ll be taking part in a regulated activity (involving unsupervised access to young people, or an overnight residential). See also POR Rule 16.7.2.

The reason

We currently have just over 87,000 Occasional Helpers [OHs] recorded on Compass, an average of 1,000 per County. Across all Nations in the UK, there are 81,9700 Group OHs, 4,740 District OHs and 470 County OHs. (These numbers include PVG-only for Scotland.) Very many of these OH ‘roles’ are no longer connected with Scouting or are ‘inactive’.

The number of OHs/PVG-only on Compass can be misleading. A significant number of OHs are added for a family camp or a section camp and are not ‘seen’ again until the 5-year time allowance expires with a system-issued request to suspend them. Also, many Trustee Board and other roles have an OH “role” open at the same time. A separate OH “role” isn’t needed for any volunteer who also has on Compass an active role which requires a criminal records check (a ‘disclosure’).

Notes

1. As part of the planning for the changeover there’ll need to be a (normally short) conversation with each of the volunteers recorded on Compass (including OHs/PVG-only. To reduce the number of these conversations, it makes sense for Groups, Districts and Counties to close the records for OHs/PVG-only in these circumstances:
 - Those who won’t realistically contribute between spring 2023 and when their current criminal records check expires.
 - where the OH is a duplicate for a volunteer who currently has a role that requires a criminal records check.
2. It’s important to minimise the number of conversations that will be needed in Groups and Districts. That’s why we’re asking you to close all OH roles (including PVG-only in Scotland) except where the Group or District has a known need to keep them. Examples of where there’s a specific need to keep an OH/PVG-only role may be where there’s a Group family camp coming up, or an event that parents/carers have agreed to support where they’ll be taking part in a regulated activity (involving unsupervised access to young people, or an overnight residential). See also POR Rule 16.7.2.
3. On our new membership system, OHs/PVG-only will be given a different (new) role title. Also, though not a **member** of the Scouts, each OH/PVG-only will have a record on the membership system and will therefore need a unique email address.
4. If an OH is deleted from the system, and they need to undertake some regulated activity in the future, then a new criminal records check can be undertaken when needed.

F) Updating organisation records

The ask

Although it is not a vital task to update organisation records on Compass prior to transition, it will be a very useful task if undertaken. The ask is to arrange to update as many of the Compass section and ASU organisation records as possible.

The reason

There are organisation records in Compass for each section, ASU, Group, District and County. Locally these have little value in Compass and as a result many are blank, and many others are very out of date.

However, organisation records will have real (and more visible) value in the new membership system.

The action

1. Section and ASU organisation records

GSLs and DESCs can update section organisation records and ASU organisation records on Compass.

Transformation Leads should please request GSLs and DESCs to bring their section organisation records up to date on Compass because this will aid the perceived useability and usefulness of the new membership system from the time of transition.

All fields in the Compass organisation record can be updated, but GSLs and DESCs are particularly asked to add (or update) these fields:

- Section or ASU name
- Type of section
- Meeting place and correspondence addresses
- Primary contact phone number
- Volunteer email address to drive the group finder system
- Scouting enquiries email address to drive the group finder system.

APPENDIX 1 shows the key fields in each Compass organisation record.

2. Group, District, County organisation records

Compass permissions mean that it is tricky for Group, District and County organisation records to be updated locally and so this will be best done after transition. We will request Transformation Leads to plan to update Group, District and County organisation records immediately after transition using an online work flow.

G) Updating 'OTHER' sections

The ask

On Compass there are several sections marked as OTHER – so not attached to a Group, District or County. These 'orphan' sections need correcting (or closing) prior to transition.

UKHQ will supply Transformation Leads with a list of 'OTHER' sections in their County so that appropriate action can be taken.

The reason

On Compass there are 277 sections marked as 'OTHER' (as distinct from being Colonies, Packs, etc.)

Many are Jamboree Units, but there are also a good number of Explorer Units, Cub Packs, etc. And they include Squirrel Dreys that are attached to a District rather than a Group.

A review of the list suggests that several are actually closed.

Notes

1. To reduce the number of 'failed' transitions, the Information Centre will relabel any obvious sections to the correct type we will then supply a list of remaining sections to Transformation Leads for their County and request that corrections are made. So that sections are either correctly identified as a current section type or they are closed so that there are no 'other' sections recorded on Compass from October onwards.
2. Guidance will be given to Transformation Leads to help them match open records to the correct unit type. For example, turning gang show teams into Scout Active Support Units.
3. **Any 'orphaned' sections that remain in Compass marked as 'other' will not be transitioned to the new membership system.** Any active roles will go into an 'unmatched' category on the new membership system.

APPENDIX 1

Current Compass fields

<p>Email addresses</p>	<p>Compass can store up to 3 email addresses for each person.</p> <p>Each email address can be classified as one of 6 categories:</p> <ul style="list-style-type: none"> • (no classification) • Home • Scouting enquiries • Unspecified • Volunteering • Work <p>One of the (max.) three email addresses must be selected as the Primary email address.</p>
<p>Telephone numbers</p>	<p>Compass can store up to 3 telephone numbers for each person.</p> <p>Each telephone number can be classified as one of 10 categories:</p> <ul style="list-style-type: none"> • (no classification) • Daytime • Daytime fax • Daytime mobile • Home • Home fax • Home mobile • Scouting enquiries • Unspecified • Volunteering

Section and ASU organisation records on Compass

Details

Contact Details

Meeting Schedule

Section - Details • Required fields

Name

Date Registered

Type

Linked Group

Leader

Section Type

Sponsorship

Section Capacity

Addresses

	Meeting Place Address	Correspondence Address
Address	<input type="text"/>	<input type="text" value="Unknown"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Country	<input type="text" value="--- Select Country ---"/>	<input type="text" value="United Kingdom"/>
Type of Meeting Place	<input type="text" value="--- None ---"/>	

Details

Contact Details

Meeting Schedule

Section - Contact Details • Required fields

Contact

	Telephone Numbers		Email Addresses	
1	<input type="text" value="--- Select ---"/>	<input type="radio"/>	<input type="text" value="--- Select ---"/>	<input type="radio"/>
2	<input type="text" value="--- Select ---"/>	<input type="radio"/>	<input type="text" value="--- Select ---"/>	<input type="radio"/>
3	<input type="text" value="--- Select ---"/>	<input type="radio"/>	<input type="text" value="--- Select ---"/>	<input type="radio"/>

APPENDIX 2

Updating key elements of your personal information on Compass to get ready for the transition to the new membership system.

1. Log into Compass and go to My Profile.
2. Please check the **email addresses** held on your Compass record.
 - a) The new membership system will use an email address as your **log-in** username. This new Single Sign On will roll out over time to all the Scouts' systems that you use, starting with the membership system.

This **log-in** email address must be:

 - Personal to you. e.g.: not GSL@anytown.org.uk or cubteam@anytown.org.uk since you may change roles over time but keep your membership.
 - Unique to you, since it will be used to direct you to your own membership record, e.g.: not Thesmiths@hotmail.com if multiple Smiths are Scouting volunteers. Nor cubteam@anytown.org.uk if all members of that section team use the single email address. Also, the new membership system won't set up the log-in if the suggested email is already in use.
 - A working email in regular use. No non-deliveries please!

To set this log-in email address, put your chosen email address into Compass (if it is not there already) and classify it as **Volunteering** (using the grey button to the left of the email address field). Please ensure that only one email address is classified as Volunteering.
 - b) The new membership system will also hold an address for **communicating** to you.

If you want to use a different address for these communications, put it into Compass (if not there already) and classify it as '**Scouting Enquiries**'. Please ensure only one email address is classified as Scouting Enquiries.

If you want to use your log-in email address as your communications email address, please delete all emails other than the **Volunteering** email address and tag the Volunteering email as your **Primary** email address. The 'Primary' selected will then be the one used for communications from Scouting all the way through until your move to the new membership system.
3. Please check the **phone numbers** held on your Compass record.
 - a) The new membership system can hold your **preferred** phone number and an **alternate** phone number.
 - b) Put your **preferred** phone number into Compass (if it is not there already) and classify it as **Scouting Enquiries**. Please ensure that only one phone number is classified as Scouting Enquiries.
 - c) Put your **alternate** phone number into Compass (if it is not there already) and classify it as **Volunteering**. Please ensure that only one phone number is classified as Volunteering.
4. For people who don't update their Compass membership record the new membership system will use some default rules to allocate the log-in and the communications email addresses and the one or two phone numbers. But to enable you to control how you are contacted its best to do these updates yourself.
5. While you are in this part of Compass, please check that your postal address is up to date.

Thank you for taking the time to update your Compass record to make sure of a smooth transition the transition to our new membership system on scouts.org.uk.