



# Making sure that everyone's personal details and membership records are up to date on Compass.

---



## Advice for Groups on updating Compass records before the changeover to our new adult membership management system.

### What we are asking you to do

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

It is really important that all the adult membership records held on Compass are up-to-date and that we are ready for transition when the data is migrated across to the new system.

By ensuring that everyone's record is correct and up-to-date and that the records of the people that are no longer involved have been closed. We will smooth the transition process and will lead to fewer puzzled people after the transition has happened and they start to use the new digital tools that are available to them.

### The reason

The data we hold on compass about our adult members contains lots of errors and out of date information. This includes things like incorrect home addresses and post codes, phone numbers and email addresses (to name a few). Some of these errors have existed for several years and several pre-date Compass. Our membership database is only as useful as the data it contains, so our move to a new digital system gives us a great opportunity to improve the accuracy of the information we hold.

The aim of this work is to make sure that the personal and membership data we hold on Compass for each of our volunteers (and occasional helpers), is up to date and accurate prior to the changeover. There will be some opportunity to rectify this on the new system, but now is a great opportunity to update the data as much as we practically can.

# Confirming that everyone's personal details are up to date on Compass

---

The aim in this work is to make sure that the personal data held on Compass for each of our volunteers (including Occasional Helpers) is accurate prior to the changeover.

## Why update volunteer's details now?

From time-to-time people's contact details may change, particularly if they move home, change their phone number, email address or their emergency details go out of date.

If they do not change their details on Compass, then they may not be getting the most recent information sent to them. And if UKHQ is sending out reminders about critical matters such as ongoing learning they are probably not getting them.

It is very important that we keep everyone's personal details up to date in Compass.

## What is involved to update these details?

1. Personal data is the information held on each volunteer's PERSONAL DETAILS, EMERGENCY DETAILS and COMMUNICATIONS tabs on their Compass record.
2. Ideally, the best person to check a volunteer's record is the volunteer themselves. However, this could be unrealistic, as in a lot of cases volunteers have never logged on to Compass and viewed their own record and would not know how to do so. For this reason, a general 'please update your Compass record' email sent to each volunteer is very unlikely to have the desired effect.
3. You will know the best way forward for your group. One practical suggestion is to ask a couple of people in your group to have a brief meeting with as many volunteers as possible (including people that are OHs only) to show them [online if possible] their record (particularly their personal details and emergency details pages). Any errors or inconsistencies can then be noted and corrected locally. For members of a section leadership team, for example, this could be quite easily done with the whole team at the end of a section meeting.

# Updating volunteers' recorded roles and training

---

The aim in this work is to make sure that each volunteer's record on Compass lists all (and only) their active (and historic) roles (i.e. the roles that they are currently undertaking, as well as all that they have previously held). Also making sure that all completed training (including mandatory on-going training) for all volunteers is recorded and up to date on Compass.

## Why?

It's important that all active (and historic), roles and all training (including mandatory on-going learning), is properly transferred over to the new systems so that each volunteer's record is seen as being as accurate as possible when each logs on to the new systems.

This also includes making sure that all completed training wood badge and mandatory on-going training for all volunteers is recorded and up to date on Compass.

When our volunteer's data was transferred to Compass there was significant angst amongst volunteers because their roles and/or training were not properly transferred. 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 both transitioned to the new systems as well as possible. The movement's general familiarity with Compass means that this updating task will be easier to complete on Compass.

## What is involved to update these details?

1. Please work with your 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 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 update the role to remove one of the variants, but also add a new role for the other variant.
3. Some roles are particularly unclear and will cause issues at transfer. For example, nationally there are 1,872 "Group Section Assistants" recorded on Compass. In reality, each of those should be a Section Assistant with a (or more than one if appropriate) specific Section rather than with the Group.
4. As part of this task, please make sure that every nominated/elected/co-opted current member of every Executive Committee (Group, District and County) is recorded on Compass. This should include every Section Leader who has opted in to the Group Executive Committee.

# Closing Occasional Helper (OH) Roles that are No Longer Needed

---

The aim of this work is to close Occasional Helper (OH) roles, except where there's a known need to keep them.

## Why check occasional helper (OH) roles now?

Nationally there are currently just over 91,000 Occasional Helpers (OHs) recorded on Compass, an average of 1,000 per County. Across all Nations in the UK, there are 85,700 Group OHs, 4,900 District OHs and 440 County OHs. Very many of these OH 'roles' are no longer connected with Scouting or are 'inactive'.

The number of OHs 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 members of Trustee Boards 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).

We're asking you to start closing all Occasional Helper (OH) roles locally, except where there's a known need to keep them. Examples of where there is a specific need to keep an OH 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.

### POR Rule 16.7.2.

- 16.7.2.1 There are a set of people who provide informal support, referred to as helpers. These are adults used to support the delivery of programme, for example parents or local subject matter experts.
- 16.7.2.2 A helper must hold a satisfactory Personal Enquiry if the helper will:
- assist with any nights away activities
  - support four or more times in a thirty-day period
  - have unsupervised access to young people
- 16.7.2.3 If a criminal records check is required, the helper must be registered on the membership system as a helper. These registrations on the membership system are not otherwise part of the appointment process and are only provided as a process to enable the necessary CE and criminal records checks to be conducted.
- In England, Wales, and Northern Ireland this role is called "occasional helper." In Scotland this role is called "PVG Only".
- 16.7.2.4 Helpers are not entitled to membership status or any benefits for members of the Scouts

## What is involved when reviewing occasional helper roles?

As part of the planning for the changeover there is a need to be a short conversation with each of the volunteers recorded on Compass as an occasional helper. To reduce the number of these conversations, it makes sense for your Group to close the records for OHs 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.

Please start to close all OH roles locally, except where there's a known need to keep them.

## On our new systems...

OHs will be given a different (new) role title. Although not a member of the Scouts, each OH will have a record on the membership system and will therefore need a unique email address.

If an OH is deleted from the system, and you find that they need to undertake some regulated activity in future, then a new criminal records check can be undertaken when needed.

### The Government's definition of regulated activity

Scouts is a regulated activity provider and must comply with the law in respect to adults engaging with children. Regulated activity with children refers to work that a barred person must not do. Regulated Activity is defined in the Safeguarding Vulnerable Groups Act 2006 and amended by the Protection of Freedoms Act 2012. Regulated activity in Scouts means where a person aged 18 or over meets any of these criteria:

- will be a member of a Trustee Board
- will be assisting with overnight activities (including nights away)
- may be helping out once a week (or on four occasions in a thirty-day period), or more frequently
- will have unsupervised access to young people
- have access to personal data about young people or adults
- will handle money

Any adult or helper delivering or likely to participate in regulated activity must hold a satisfactory DBS and Personal Enquiry.

The Scout Association does not accept DBS checks from other organisations. This is because the nature of the information that may be disclosed on a Scout DBS criminal record check may differ from that provided to another organisation.

# Remove any undeliverable email addresses

---

The aim of this work is to remove or correct each 'undeliverable' email address from volunteer's records on Compass to ensure that Compass contains only valid email addresses.

## Why?

There are many undeliverable email addresses recorded on Compass. On our new systems, email addresses become even more important than on Compass so eliminating all current non-deliverable email addresses will be immensely useful.

## How do I know if an email is undeliverable?

You can check whether an email address is valid in a number of ways.

1. If your District uses a mailing system (for example Mailchimp) and draws the email addresses for mailings from Compass, then this 'undeliverable' information may already be available.
2. An alternative is to send an email all the adults in your Group using the email addresses held on Compass. The mail sent to all will determine those email addresses that are "undeliverable". (Please note that this approach will only work for primary email addresses. i.e. any other email addresses will need to be checked manually – perhaps while speaking to volunteers as part of checking their personal detail).
3. A source of 'working' emails (especially in a Scout Group or Explorer Unit) may be OSM. If a person with a non-deliverable email address is also recorded on OSM, it's worth updating Compass with the volunteer's email address recorded on OSM if that's different.

# Make sure all members of your team have a unique personal email address listed as their primary email address on Compass

---

The aim of this work is to make sure everyone currently on Compass has a unique personal email address on Compass before we transition across to the new system.

## Why?

To be able to log-in to their personal record on the new digital system everyone will need a unique and personal email address.

This email address will be the username used to log in to personal accounts on the new system, so it won't be possible for two people to have the same login.

## What is involved to update these details?

1. Everyone needs to have a unique personal email address listed as their primary email address on their Compass record
2. By personal we mean a non-scouting email address, this means that lead.volunteer@1stthamesscoutgroup.org.uk or matt@1stthamesscoutgroup.org.uk are not acceptable as lead.volunteer@ could potentially need to be passed on to a new volunteer when someone else takes on the role for the group and matt@ would generally have the password reset and control managed by members of the group

This 'email' task will be made much easier if all non-deliverable email addresses have already been removed from Compass.