South & South East London Scouts

Transforming the Volunteer Journey

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 first 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

There are many errors in our volunteers' personal data held on Compass. These include things like incorrect addresses and post codes, phone numbers and email addresses to name a few. Some of these inconsistencies have existed for several years and several pre-date Compass. Our membership database is only as useful as the data it contains, so this transition presents a great opportunity to improve the accuracy of the information we hold.

Stage 1 of this readiness process

In order to have a steady approach to our data cleansing process please start to think about and work on the four topics listed below. We're not expecting you to do all the tasks yourself. Instead, please take the lead by finding and encouraging the right people in your group to help make the changes.

The Stage 1 action topics listed in this guidance are:

a) Confirming that every volunteer's personal details are up to date on Compass
b) Updating volunteers' roles and training
c) Closing Occasional Helper only "roles" that are no longer needed
d) Check that email addresses are valid and remove and update any undeliverable email addresses

We recommend that the topics are prioritised in the order shown above, though please note that completing (c) early may reduce the work required in topic (a). Note that the final topic - (d) - is important but can be left to be tackled after topics (a), (b) and (c) are complete.

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

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may change, particularly if they move home, change their phone number, email address or their emergency details go out of date.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.

Notes

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.

B: Updating volunteers' recorded roles and training

It's important that we make sure that each volunteer's record on Compass lists all (and only) their current 'active' roles as well as any roles that they have previously held 'historic'.

It's also important to make sure that all completed training (including mandatory on-going training) for all volunteers is recorded and up to date on Compass.

The reason

It's important that everyone's active and historic roles and all their training is properly migrated over to the new systems so that everyone's record is seen as being as accurate as possible when they log on to the new systems.

As a result of the Compass transition some years ago, there was significant angst amongst some volunteers because their roles and/or training were not properly transitioned. This was in part because of the format of Compass's predecessor, the MMS database.

Because of this, we want to ensure that everyone's roles and training are both migrated across to the new systems as accurately as possible. The movement's general familiarity with Compass means that this updating task will be easier to complete on Compass.

Notes

1. Please make sure that all your teams current roles are accurately recorded on Compass. Please close roles which are no longer active, including inactive Active Support Unit members.

2. Some roles on Compass 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 section (or more than one section if appropriate), rather than with the Group.

   If a person’s role is not showing the section they work with i.e. is just showing Assistant Section Leader please ensure it indicates Assistant Section Leader – Cubs Scouts (for example). Please also correct any 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). In these cases please ‘close’ one of the variants, but also add a new Section Assistant role for the other variant (so they have two active roles: ‘Section Assistant – Cub Scout’ and ‘Section Assistant – Scout’

3. Please also make sure that every current nominated / elected / co-opted member of your Executive Committee is recorded on Compass. This should also include every Section Leader who has opted in to the Group Executive Committee.

C: Closing Occasional Helper only “roles” that are no longer needed

Please start to close all 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-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). As detailed in 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: a. assist with any nights away activities b. support four or more times in a thirty-day period c. 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

The reason

Nationally we currently have 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. Many of these OH ‘roles’ are no longer connected with Scouting or are ‘inactive’.

The number of OH-only 'roles' 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 Executive Committee 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-only). To reduce the number conversations, it makes sense for groups, districts and counties 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.
2. It's important to minimise the number of conversations that will be needed. That's why we're asking you to close all OH roles where there is not a reason to keep them. Examples of where there's a specific need to keep an OH-only role may be where you have a 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 (see above).
3. On our new systems Ohs-only will be given a different (new) role title. Also, though not a member of the Scouts, each OH-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 you find that they need to undertake some regulated activity in future, then a new criminal records check (DBS) can be undertaken when needed.

D: Remove any undeliverable email addresses

Please remove or correct each 'undeliverable' email address from your teams records on Compass to ensure that Compass contains only a valid and unique email address for everyone.

The reason

There are many undeliverable email addresses recorded on Compass. On our new system, email addresses become even more important than on Compass so eliminating all current non-deliverable email addresses will be immensely useful. (Also see the 'early warning' below.)

Notes

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

1. If you use a mailing system (for example Mailchimp), and draw the email addresses for mailings from Compass, then this 'undeliverable' information may already be available.
2. As an alternative you could send an email to your whole team from a list of emails addresses generated from Compass. The email sent to all will determine those email addresses that are "undeliverable.

Please note that this approach will only work for primary email addresses listed on Compass. Any other email addresses listed on a person's record will need to be checked manually – perhaps while speaking to them as part of checking their personal detail [(b) above].

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.

Future stages

There will be a need for other Compass preparation stages (once the above are complete). These will include a focus on (at least) emails, organisation records (for sections, groups, districts and county) and learning.

In 2023 we will provide you with details of what needs to be done on Compass to make sure there's a smooth transition with regard to email addresses.

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

HOW TO REGISTER FOR AND LOG IN TO COMPASS

GO TO www.scouts.org.uk

Before you start:

- Make sure that you have your membership number to hand.
- If your record doesn't have an email address on it, or the email address is old, ask your line manager to add or update it.

1. Click on Info for volunteers and then on 'Compass' at the Bottom of the index

2. Click 'Register for your account' and enter information, following on screen instructions.

3. Click 'Submit'.

4. Any errors will be highlighted. Correct these and click 'Submit' again.

5. If no errors, or when successful, click 'Sign into your account'.

6. Enter your username and password.

7. Click 'Log in'. You will be taken to your homepage.

COMPLETE

Remember:

- Make sure you choose something memorable for your username, password and security question.
- Make sure you keep them confidential and don't tell anyone else.

For lots more support and guidance visit:

https://compasssupport.scouts.org.uk/?guide-cat=using-compass