Confirming that every Volunteer'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 OHs) is accurate prior to the changeover. We understand that some of the incorrect data may have originated on systems that existed before Compass. There will be some opportunity to rectify this on the new systems but now is a great opportunity to update the data as much as practicable.

Why Update Volunteer's Details Now?

There are many errors in our volunteers' personal data held on Compass. Incorrect addresses/post codes and phone numbers are just two examples. Some of these inconsistencies have existed for several years and several pre-date Compass. Databases are only as useful as the data contained within them, so this transition presents a one-off opportunity to improve the accuracy of our database.

What Personal Details Need to be Up-to-Date?

The personal data referred to in this topic is the information held on each volunteer's PERSONAL DETAILS, EMERGENCY DETAILS and COMMUNICATIONS tabs on their Compass record.

Who Should Update these Details?

Ideally, the best person to check each volunteer's record would the volunteer themselves. However, this is unrealistic, in major part because many volunteers (especially at Group level) have never logged on to Compass and would not know how to do so.

For this reason, we are not planning a general 'please update your Compass record' email sent from County to each volunteer as this is very unlikely to have the desired effect.

You will know the best way forward for your District.

One practical suggestion is to ask an administrator in each Group or your District to have a brief meeting with as many volunteers as possible (including OHs) to show them [online if possible] their record (particularly their Personal Details and Emergency Details pages). Any errors or inconsistencies can be noted and corrected by an administrator. 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 Check Roles and Training?

It's important that all active (and historic) roles and all training (including mandatory on-going learning) is properly transitioned 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.

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 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?

- 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.

- 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.

- 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.

- 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

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.

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 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).

What iss involved when Reviewing Occasional Helper Roles?

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). To reduce the number of these conversations, it makes sense for Groups and Districts 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.

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 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 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.

On our new systems, OHs will be given a different (new) role title. Also, though 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.

Remove any Undeliverable E-Mail 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. (Also see the 'early warning' below.)

How do I know if an E-Mail is Undeliverable?

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

- 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.

- An alternative is to send an email that you would normally send to the whole District by generating the email addresses from a Compass Appointments Report - this report lists all 'primary' email addresses 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. i.e. any other email addresses will need to be checked manually – perhaps while speaking to volunteers as part of checking their personal detail).

- 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.

- Finally, UK Headquarters can access a list of email addresses that were undeliverable from recent all-members' email and we will be supplied a list after the November 2022 mailing which we will forward on.

Early Warning

As we progress with Transformation, there will be a need to review email addresses prior to the transition to the new membership system. 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).