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ABSTRACT

This article is a guide to assist volunteer leaders to develop an understanding of how to assess their program needs and resources to appropriately select and effectively assimilate data management resources into their volunteer programs. Volunteer leaders will learn why it is important to plan and prepare for system automation and how such planning is similar to the activities involved in the successful placement of volunteers.

Automated Data Management Systems for a Volunteer Program: Initial Planning

Diane L. Leipper

INTRODUCTION

Does the thought of learning about computers make you want to recruit the nearest computer genius to figure it out? Do you say, "I don't have time to take computer classes or read the manuals and, besides, I need to focus on managing the volunteers?" Do these situations sound familiar?

Volunteer administrators use their excellent interpersonal skills frequently. They recruit, interview, train, place, support, evaluate, and recognize people who volunteer. They are experts at finding resources, matching individuals to tasks, and doing multiple things simultaneously. They also recognize the value of documenting volunteer effort. They know what information is critical to record. They are aware of the impact proper documentation has on the organization. But when it comes to the "c-word", volunteer directors often have limited experience and few resources.

Do you know you need a computer to maintain your data? Have you talked with your peers, checked out vendors, and bought a system that seemed like it would solve all your problems? Do you now find you can't get the reports you want and the system doesn't fit the needs of your program?

Think of computers (and other technological assets) as another volunteer, a team member with special skills.

- You need to recruit the person (hardware) and the skill set (software) that is compatible with your organization and that will fill your specific job opening.
- You need to interview the available products to determine the best match. What do you want the computer to do? What are its responsibilities, its accountabilities?
- You need to train the system — get it set up appropriately for your work environment.
- You need to place the system much like you place a volunteer. Who is going to work with the volunteer? Where will s/he work? What resources will the volunteer need to get the job done? These are analogous to the considerations needed for an automated data management system.

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- You need to support the system. Is the information systems department available to assist you? Do you need outside support? What about the system vendor? What support does it provide? What about contract consulting and support?
- You need to evaluate your system. Does it meet your needs? Has the system become a productive member of the team?

A data management system, just like a volunteer, needs supervision and the active participation of the volunteer administrator to assure high quality results.

PLANNING

The key to ensuring you create a data management system that will be an asset to your volunteer program is planning. The constant state of refinement and change in technological resources, and the need for volunteer programs to remain viable by being flexible and adaptable, make planning essential. Planning will enable you to obtain a system that will enhance your ability to be in control of change. Resources in most non-profits are limited. It is imperative, therefore, that technological decisions are cost effective, meet current needs, and adapt to future ones.

In *The Handbook of MIS Management* (1985) Frank W. Lynch, President of Northrop Corporation, says, "If you can't articulate it, you can't do it." This is certainly true when considering which data management system will work for your program. The handbook includes a list of other benefits of planning such as the better you plan, the better you will be able to communicate your needs to your administration and to hardware and software vendors. This will help assure effective and appropriate decisions. Planning can identify cost savings, cost sharing, and effective resource management opportunities: "Properly communicated, it [planning] can also provide a powerful stimu-

lus and sense of direction to employees at all levels, focusing their efforts, increasing their productivity, and making them feel that they are a genuine part of the enterprise" (Umbaugh, 1985).

REVIEW YOUR EXISTING PROGRAM

The planning process should focus on assessing your current volunteer program processes. A vendor will be familiar with the technological products available for data management, but you are the only one who has a clear understanding of the needs and unique documentation requirements of your volunteer program. Taking the time to do a full review of your program, its current and future needs, and its specific documentation requirements enables you to communicate these needs to vendors. Vendors, with their technical understanding, can then better match your needs to available products. Without a clear understanding of your program, you increase the probability of making hardware and software decisions that will not meet your requirements, will not be effectively utilized, and will waste the resources of the program.

Volunteer administrators often feel they don't have the time to do an in-depth review to evaluate the needs of their program and the various systems available for data management. The necessity for a review can be the start of a new volunteer opportunity. You can create a volunteer task force whose specific focus is to assist in reviewing the volunteer program and researching volunteer data management systems. This task force can be organized either for the short-term or as an ongoing effort. As an ongoing effort, the task force can assist in managing the transfer of data into the new system. The task force can assist in training others who will use the system. It can carry out periodic evaluations to determine how the system is meeting the needs of the program. You, as the volunteer administrator, must maintain a close working relationship with the task force. Being involved with the assessment, implementation, and management

of your department's database management system provides you with a more comprehensive understanding of your program. Ultimately, it will be you who is responsible and who will provide continuity in the management of the volunteer documentation system you choose.

DECIDE WHAT YOU NEED

Your volunteer application form can provide a template for determining the data fields you might want in your database. You should be able to enter all of the information from your current application form into the database. Probably this will mean that your database should include fields for one to five character letter or number codes as well as note or memo fields that can contain full sentences or short paragraphs. Usually it is better to have the ability to log as much information as possible even if unused, rather than go back and restructure your database later.

Your automated data management decisions, in part, will be determined by your work style and your current document management methods as well as the type of information you need to have available regarding your program and the purpose for maintaining that information. Defining your program information requirements objectively in terms of collection, storage, use, the kinds of reports you need, the questions to be answered, and to whom those reports will be given will assist in effective selection of a new system. You also will need to decide who will use and who will manage the system and what technical support will be available to you for both the application and its function.

To begin the planning process consider:

- Why do I need to change my system?
- How will the changes impact the volunteer program?
- How much time do I currently spend documenting the program?
- What will the benefits be?
- Who will benefit?

- How much time am I willing to spend researching, purchasing, and learning a new system?

List what you do now. Do you track volunteer hours, scheduling, and birthdays? Do you write monthly reports? Define your needs now and into the foreseeable future. When defining what your needs are also ask yourself the reason why. For example, if you would really like to track demographic information on volunteers, what will you use the information for? Why do you need to know this information? Answering these questions will help you focus on the primary goals of the volunteer program and your organization and assist in determining your software needs. Such answers will provide a means by which you can measure how well the system performs.

After you have reviewed your current program, think about what you would like to do that you aren't doing now. Examples might include the ability to select volunteers by specific groups to better identify what community populations volunteer and where you might want to target recruiting. You may want the ability to provide reports to various departments that utilize volunteers in order to document the contributions of volunteers in those departments and determine which departments over- or under-utilize volunteers, and why.

Think about what kinds of reports you need. Among the many possibilities are reports that can be developed to document total hours for all volunteers, time in and time out, total hours for individual volunteers, hours by department or program, scheduling reports, annual summaries and demographic reports. When deciding what reports you want, think about how these reports will increase the organization's awareness of the impact of volunteer services. Reports can document volunteers' efforts to assist in achieving organizational goals and to support the organization's mission statement. Reports can assist in documenting community

support, determine if customer service goals are being met, and track the cost-effectiveness of volunteers. Also think about who is going to read the report. Does the reader prefer a narrative of the activities and services provided by the volunteer program, or does the reader prefer a statistical analysis of the program?

Other areas that you should address in your planning process include determining the need for capabilities in addition to database functions. For instance, will you need word processing capabilities to produce documents such as letters, flyers, manuals, and job descriptions? Will you need spreadsheet capabilities to analyze financial data or create budgets? What about printers? Will you be producing a lot of flyers, documents, letters, generating reports, or printing envelopes and labels? What about extras? A fax program and modem for your computer can be beneficial in transferring documents. E-mail capabilities are becoming more important both within the organization and to communicate with other professional organizations. The issue of whether or not to include any additional software capabilities or extra functions in the initial purchase can influence your decisions and should be taken into consideration in your planning process.

Making the transition from one system to another will be much simpler if your software, including word processing, database, and spreadsheet functions are compatible and allow you to import and export data easily from one to the other. Software applications that are linked to allow sharing of data can greatly enhance your capabilities. Are the software products you are considering compatible with standard market products?

Determining methods to secure data, to limit access to the system, and to ensure confidentiality should be included in the planning process. Do you need or want a system where volunteers can access sign-in and other basic information, or will it be a system that is used primarily by staff? Is your system going to be linked to other department computers? Will it be linked to the organization's mainframe? Will it be a stand-alone system?

An often overlooked but critical issue is that of determining what kind of back-up system you will be using: tapes, disks, off-site, or on-site. How is the back-up system supported by the application you are considering? Sometimes, even with the best of precautions, user errors, power failures, or equipment malfunctions can cause the loss of data or create the need to restore the system. With carefully thought out and well-maintained backups, the ability to restore your system or recover data can be done with minimal effort and expense. In addition, a good back-up system off-site, or at least out of your office, provides a safety measure in the case of office theft or fire.

THE OPTIONS: APPLICATIONS, SOFTWARE, AND HARDWARE

Whether you create a volunteer task force to plan for the transition to an automated data management system or do it yourself, there are many factors to consider. To start with there are three basic systems for automated data management. They are commercial flat file database, commercial relational database, or custom-designed database applications.

A flat file database is similar to a spreadsheet in that the data is in a table format. The fields in flat file database do not have the capability to be automatically linked by a common field. Examples include 1-2-3, and Reflex. A relational database program can be set up as a series of tables (components) that are linked by a common field, for example an ID field. Relational database programs include dBase, Paradox or Access. Each type of system has its benefits and its limitations.

One solution is to purchase a standard commercial software suite or package that combines a variety of software applications usually including a relational database program, word processing, and personal information manager, or projects

management software. Examples of this type of package include Lotus Smart Suite or Microsoft Works. These packages usually can handle the basics of any volunteer program and are relatively inexpensive to purchase. They have the added advantage of providing a variety of support services such as manufacturers help desk, on-line support groups, and other users who often can provide insights from their experience that is helpful when shared. Utilizing a suite or package can provide you with the opportunity to get the "feel" of a database and allow you to explore methods of documenting and reporting the activities of the volunteer program. This will enhance your ability to determine your needs when you decide to purchase a dedicated custom volunteer management system. If you have chosen wisely, you should be able to transfer your data electronically from one system to the other.

Two types of software often used to manage volunteer data are spreadsheets and word processing programs. Neither of these are effective for complete volunteer data management. Spreadsheets are limited in the types and amount of data they can process and in reporting capabilities. Word processing programs are not advisable to maintain volunteer records because each file is a separate document and trying to link files is complicated. The error rate can increase due to the inability to link information and to use table lookups which function similar to a help file where key information is available in list format accessed by a single key stroke. In addition, word processors don't have integrity checks to make sure data is in the proper format or other common database features.

When you begin to review specific products, there are certain issues to consider that will assist you in assuring that the product you purchase will meet your requirements and provide the ongoing support you need. For example:

• Consider the company behind the product. How long has it been in business? Is it a local or national company?
• How long has this product been on the market?
• What about upgrades?
• What about service contracts?
• Does the product meet your needs as is, or must it be customized? Is customization included in the price or added on? How does the company representative react to your need for customization?
• Do you know other volunteer administrators who have used the system you are considering? Ask their opinion. Ask if you can get some hands-on trial experience with their system.

When considering hardware:

• What kind of hardware is needed to run the data management system? Is it standard market products or specialized hardware?
• Can you buy equivalent hardware from several local vendors?
• Is it compatible with other hardware utilized by your organization?
• Can you transfer your software from your current system to the new system?
• Is the machine speed adequate to enhance the productivity of your program? Do you notice the machine taking its time to display forms or prepare reports?
• Does the machine have appropriate memory for your needs?
• Is the video monitor adequate to minimize eye strain and enhance the working environment?
• Who will provide maintenance?

When considering software:

• Is it compatible with other software programs utilized by the organization?
• Can data be easily imported and exported for fax, mail merge, back up, and special needs?
• Is the process for moving your existing data from paper or other automated systems to the new system planned out?

• Are upgrades available and easily installed with minimal disruption to current ways of work?

Have you considered the peripherals you might need? Fax capabilities provide for direct transmission of documents to interested parties. Data modems are need-ed for Internet access, remote support, and data transfer. Network capabilities (within your own department, within the whole organization, on the Internet) may en-hance the system's usefulness. Multi-media capabilities might allow for usage by special needs volunteers.

The system you choose should meet your current needs as well as meet the needs of the next two to five years. You should be able to modify and upgrade the system without losing your current data or having to reenter it manually. You should be able to adapt and change your system to meet new requirements, add fields to your database, design new reports, and change the data entry forms. Is this easy to do or a major task? A good review of your volunteer program should be combined with healthy skepticism of available products. Beizer (1988) states that "what many people call 'computer-phobia' is really healthy skepticism, a reluctance to be steamrollered into 'the latest and bestest' with possibly serious consequences."

SET-UP AND SUPPORT

Support for your data management system should be determined before mak-ing a purchase. This includes equipment documentation, manuals, system orienta-tion, on-site assistance, and phone, or on-line assistance. A major stumbling block to effectively utilizing data management systems is not determining who will set up the system, who to call when you run into problems, and who will help ensure the system works properly. Costs for sup-port services should be considered in the original purchase price and as an ongoing cost. In organizations with an information systems department, is there someone who can assist you in determining your needs, and what resources are available to assist with set-up, training, and sup-port of the system?

Some companies whose products you might be considering provide support for their products. In this case you need to determine the kind of support, the dura-tion of the support agreement, and whether or not it involves additional costs. Another source of support is utiliz-ing outside consultants. What is their experience? What can they provide? Are they available when needed by phone, electronically, or in person? Hardware and software documentation acts as the repair manual. Such documentation pro-vides information that allows the person who sets up and maintains the system to be more effective.

A common, but often problematic solu-tion is asking a well-meaning "expert"— volunteer, student, consultant, or entre-preneur — who claims to have the exper-tise to set up the perfect system. Their knowledge is usually based on classroom experience, personal use, or hobby or entertainment experience. Such an indi-vidual may not have experience or exper-tise with professional database develop-ment that would enable him or her to create a product to meet current and long-term needs. These individuals may have preconceived ideas based on personal experience that negatively impact the sys-tem they design. Such a person may not be able effectively to communicate the workings of the system to staff and vol-unteers and, therefore, the system be-comes a one-person application. In addi-tion, systems set up this way usually have neither documentation regarding the sys-tem nor guarantees. Since they are indi-vidually designed and poorly document-ed, it may be difficult to find others to help you with the system. Circumstances may change, the "expert" may no longer be available, and you are left with an application no one else knows how to manage or maintain.

You need to find a person who is pro-

fessionally committed, able to assume liability for the system, and who has sufficient expertise, experience, and capability to create one that can be maintained and supported after he or she is long gone. This person would need to be willing to work closely with the volunteer administrator to gain the knowledge of the factors involved in documenting a volunteer program.

CONCLUSION

Determining needs and finding and purchasing a system is not the end of the process. As with volunteers, technological assets don't magically solve your problems just because you filled an opening. A good volunteer program depends on the development of solid recruiting, interviewing, training, supporting, and evaluating methods and policies to ensure it is effective and viable. The same is true for your data management system. Building a solid foundation will ensure that your system is a productive team member and not just an object that clutters up a desk. As with good volunteers, there are ongoing needs for additional training, task enhancement, maintenance and upgrades, and evaluation. There are additional and ongoing costs that should be part of your proposal. These might include training time, upgrades and enhancements, back-up media, and maintenance services.

Purchasing an automated data management system is a major decision and a major investment. It is one that can have all kinds of visible and invisible impacts on your program. Drucker (1992) says non-profits have shifted from an "emphasis on the 'good cause' to an emphasis on accountability and results." Investing the time, effort, and money up front can ensure a quality investment that will document the results of the volunteer program. Proper planning will facilitate an investment that will be cost-effective, provide returns for years to come, and minimize the frustrations of change. It will prevent the all-too-common problem of obtaining a system that, after a few attempts at utilization, sits in the corner or is used for non-productive endeavors.

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