



# Handling Volunteer Files on Your Computer —with Ease

By Patrick Saccomandi

**A**natural match exists between a computer and the need to register and keep track of volunteer activity. There's so much information a volunteer administrator has to deal with—volunteer skills, agency requests, appointment dates, follow-up dates, hours, monthly summaries—it's a wonder that a volunteer office doesn't drown in paperwork! (Many do.)

At the same time, computers are often more trouble than they're worth. Neither the volunteer nor agency information enters itself into the computer. It takes a lot of planning, effort and discipline to design computer files, get the software to work and stick to the daily job of managing computer files.

All of this comes as no surprise. Change always has a price. Yet, in over two years of actively supporting computerization among volunteer programs, VOLUNTEER has learned a lesson or two about how to approach this technology successfully.

If you recently have obtained a computer and are looking for a way to program the thing so that it will handle your office files,

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## 1. Find a fanatic.

You know whom we are talking about. This is the person who dives into the keyboard and emerges on Thursday. It's a mixture of obsession, thrill and pride that drives these people to solve any puzzle the computer throws out.

You need this person because you do not have the time and you probably do not have the inclination to penetrate all of the itty-bitty-gritty problems that plague any new computer system. Save yourself the frustration. Find a friendly fanatic who will just love to prove his/her stuff on your computer.

## 2. Stay in control.

Be nice, but be firm. Be sure that the problems to be solved relate to your needs. Your computer helper may want to get involved in a rhapsodic effort of writing the perfect computer program—in a software language no one else could decipher.

The most productive (and safest) way to manage the talents of your computer whiz is to spell out clearly what information you want to go into the computer and what you want it to look like when it comes out. As for the middle part, where the software does its thing, use a good, off-the-shelf data base package (dBase III, RBase 4000, Condor III, Reflex, Knowledgeman, Powerbase, Helix and others). These packages can build a file system that custom fits your needs. And, they can be mastered by a noncomputer person, especially after someone more skilled sets up the initial applications and concretely demonstrates how it works.

## 3. Take the plunge.

Face it, your computer friend will soon leave (when the thrill is gone), and the time will come when you must take "hands-on" control of the computer. Something that powerful and important to your office must be mastered directly. Finding other computer fanatics will become increasingly more difficult. (Like all adventurers, their excitement comes from being the first on the scene.)

OK, you say. But is it as easy as one, two, three? To start, how do I find this computer whiz?

This is probably the easiest of the steps. Community colleges and four-year institutions have loads of computer and business students who are looking for internships. Your needs give them the chance to polish skills that readily can be converted for the job market. Other candidates come from your regular volunteer recruiting. Business people seeking to flex their skills, transitioning homemakers wanting to develop a marketable skill, and retirees preferring to continue using their talents are just some of the resources that can be tapped. Last year, VOLUNTEER distributed 50 Apple computers to nonprofits, and most have engaged volunteer technical support in this fashion.

## A Data Base Package?

What is that? Why not purchase a "volunteer computer package" that is already set up to go?

There are over 80 Volunteer Centers who have developed computer programs for their offices, virtually all of whom use

one of the generic data base packages listed above. About 10 of these centers also have indicated an interest in making their software applications available to others for some fee. Over the course of the next year, we will attempt to analyze the qualities of these applications to be able to give advice on the appropriateness of their use.

But, we stick by our original suggestion: Obtain a good data base package and build your own files. We say this because all volunteer programs want different things from their software. What you want to record about volunteers and requests for volunteers will be markedly different from others. Any program set up by someone else, therefore, probably will be inadequate for your needs. The effort required to modify it would be equal to the task of starting from scratch. What you can certainly use from another's computer system is printed copies of that person's data entry screens, menus and report formats. These can be models to give you ideas on how to set up your own.

A generic package, such as dBASE, RBASE, etc., will cost from \$350 to \$650. Look in the computer magazines (*INFOWORLD*, *PCWORLD*, *Personal Computing*) for ratings and prices. Use this software for your full range of data base needs, such as special files for donated materials, information and referral programs, subscription information for newsletters.

By the way, these computer packages are known as "relational" data base packages. This means that the files you build with them can be linked up with others. For example, they can join the name-address information from the volunteer file with the contact information from the agency file to produce a worksheet for follow-up calls for recent volunteer referrals.

One last argument on this. A good relational data base package will help attract that volunteer "techy" to aid you. They know that skills and a track record with one of these packages is a real plus in the job market.

### Data Input

OK . . . the next step. How do you best direct the energies of your computer volunteer to the task of making a data base package work for you? We said that you should give specific instructions on what data you want in the computer and what reports you want out of it.

Think of the data input as a computer

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*****AGENCY FILE*****
AGENCY# 11003   AGENCY Eastside Multi-purpose Center   ENTERED 10/16/83
                DIVISION After School Enrichment Program   UPDATED 02/11/84
STREET 4312 Atkinson Boulevard   CITY Decatur   STATE PA   ZIP 19445
PHONE 215-339-5522   HOURS M-F 8 to 5:30; SAT 10-1:30   HANDCAPACCESS? Y
Director's DAPL Mr.   DFN Charles   DLN Anderson
Contact's  CAPL Ms.   CFN Sarah   CLN Capaletti
SERVICES After-school care includes remedial tutoring in elementary level reading/math
  
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*****JOB DESCRIPTION FILE*****
AGENCY# 11003   JOBTITLE Elementray level reading tutor   JOB# 11003-12
DUTIES Tutor classes for Elm. grade schoolers in remedial reading   ENTERED 11/4/84
SKILLCODES T110, T112   VOLNUMBER 12   MINAGE 18   UPDATED 12/17/84
                M/F/B? B   EDLEVEL 10
Job Contact's: JAPL Ms.   JFN Jackie   JLN Gibson
TIMES: STARTDATE 1/15/85   ENDDATE open   FILLDATE
        WORKHOURS 3:00-5:30 M-F   MINHOURS 50
BENEFITS/TRAIN Parking, snacks, Pool pass, Orientation required (2 hours)
COMMENTS Tutors will work in teams of 5 and be assigned to 3 children each
  
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*****REFERRAL FILE*****
AGENCY# 11003   JOB# 11003-12   VOL# 1845   SKILLCODE T110   ENTERED 11/23/84
REFDATE 11/23/84   APTDATE 12/1/84   PLACEDATE 12/15/84   TERMDATE
CALLBACK 1/15/85   HOURS
COMMENTS For the callback, ask if she was able to recruit her friend, Chris.
  
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Sample volunteer request and referral files as they appear on a computer screen.

entry screen, where the questions on your paper forms are given labels and where spaces are provided to hold the answers. The illustrations show the contact information for agencies, the volunteer job requests from agencies and the referral activity. Each agency will have one entry completed in the agency file, but probably will have several entries in the volunteer job and referral file—one entered for each request and one for each referral.

Now, create your own. Your "palette" for each file will be screens that hold 80 characters across and 24 lines down. Use label names that are succinct, because you will not want to waste limited screen space. As with the illustrations, indicate the amount of space for the answers by using underlines—one underline for each character. For example, for a last name, you may wish to assign a line 15 characters long. Again, be efficient with the space, not only because of the screen size, but also because your computer will have limited amounts of storage to hold all the information from your files.

Try to make your questions (labels) as specific as possible. The computer quickly finds skills, dates, cities and other data when they are entered into their own space on the screen. Open-ended answers should be used sparingly because they eat up a lot of computer storage. Also, computer searches are much slower and less accurate when wading through information in a text format.

Use the computer as an index to your file information. Keep large amounts of background descriptions in a file drawer to be viewed after the computer has winnowed down matches between volunteers and assignments to a few likely candidates.

When possible, use hierarchical codes. This best applies to skills and interests, as illustrated by the excerpt from a Volunteer Center's skills listing. You will notice major headings with specific skills. The major headings use a letter of the alphabet, and the specific skills have numbers. Thus, you can ask the computer to find an agency wanting a particular skill (B210—Personnel Management), or you can list the agencies wanting anyone with a business skill (all the "Bs"). This use of hierarchical codes can be extended to occupations, agency types and other areas. (Note: *The Volunteer SkillsBank*, a manual published by VOLUNTEER, provides extensive examples of skill categories and other information you may wish to put in a computer file.)

## Skill Categorization Sample

### A - Agriculture/Environment/Animals

- 100 General
- 110 Animal Care
- 120 Ecology
- 130 Energy Use
- 140 Environmentalism
- 150 Farming
- 160 Forestry
- 170 Gardening
- 180 Landscaping
- 190 Naturalist
- 200 Nuclear Energy
- 210 Soil Management
- 220 Solar Energy
- 230 Water Use Conserv.
- 240 Wildlife
- 250 4-H Clubs
- 400 Other

### B - Business Management

- 100 General
- 110 Accountant
- 120 Banking/Loan Systems
- 130 Bookkeeping
- 140 Budgeting/Cost Analysis
- 150 Computer Management
- 160 Development/Fundraising
- 170 Financial Planning
- 180 Grantsmanship
- 190 Management Training
- 200 Marketing/Advertising
- 210 Personnel Management
- 220 Program Development
- 230 Program Evaluation
- 240 Property Management
- 250 Public Relations
- 260 Tax Analysis/Reporting
- 270 Other

This illustration also points to the need to have more than one file to hold the data

on an agency's requests. Trying to put all the information you need into one file would create an impossibly large entry, because any one agency may have several volunteer job requests and referrals pending. But because these files are built with a "relational" data base package, the job and referral entries are "joined" to the agency information when a report is needed with information from each. This is accomplished by linking the agency ID and the JOB numbers.

This article is not going to get any more technical on these points. That is what your volunteer computer whiz is going to do for you. Carrying out this exercise, however, should help your computer volunteer understand what information is going into the computer and how many files need to be set up to handle the job.

You go through a similar exercise for your output reports (on the screen or printer). Paint the report formats you want, identifying the data that go into the report, how they appear on the report (what is on the first line, second line, etc.), and how you want the report organized (in order by zip codes, last name, skill code, etc.). See

## Report Sample

In the accompanying sample, the report uses abbreviations for how a skill may be applied:

- DIR = direct assistance to an individual
- ADM = Administrative assistance to an organization
- BRD = Board participation
- TRN = Trainer
- 1 = "interest"
- 2 = skilled
- 3 = highly skilled

Full Report of Volunteer Information									
#10045	Abe1	Lewis						HPhone	522-6614
	673 Buckingham Place	Milwaukee	WI	54612				WPhone	331-2300
	Occp:	Public Relations Manager		Wislon Tool & Dye				Areas:	NW SW
	Client Pref:	Teens, Handicapped							4/1/85
	Referral Pending?	N	Last Placement:	City Baseball League					
	Skill Name		Code	DIR	ADM	BRD	TRN		
	Fundraising		B160	2	2	2	1		
	Marketing		B200	3	3	3	2		
	Public relations		B250	3	3	3	3		
	French		L140	2					
	Baseball coach		R210	2			2		

the example for a volunteer listing.

Typically, you will want a format that gives all the information on the file, one that is limited to a line or two for each entry so that you can quickly scan through them, and several special-purpose ones, such as for mailing labels, staff worksheets and summaries.

Now for the last step—taking the plunge and getting "hands-on" experience in managing your data files. For the Apple Project, we have noticed that the Volun-

teer Centers who do best are those whose executive director and program directors become skilled with the computer. Their own enthusiasm carries over to the staff so that the computer is actively applied to the office's needs. Everyone sees that if a busy director can learn how to use it, all should be able to. Avoiding direct contact with the computer sends a signal to the staff that the computer is something different and forbidding.

Personal experience with the computer

also means that the director understands its capabilities and can develop the most appropriate applications for it. An abstract awareness of what a computer can do is no substitute for that "hands-on" feel.

Fortunately, today's microcomputer systems can be mastered by the noncomputer person. Find a friendly fanatic to help break the ice (who knows, you may be a closet computer fanatic) and discover the joys of learning how to use this powerful technology. ♥



**Nonprofits Enter the Computer Age.** Community Careers Resource Center, 1520 16th St., NW, Washington, DC 20036, (202) 387-7702. 1984. 35 pp. \$6.95.

Updated and expanded from a four-part series that first appeared in *Community Jobs* magazine, this booklet was written by Marc Rotenberg, founder of the Public Interest Computer Association in Washington, D.C., and writer-editor Iris Rothman. It is based on the experiences of community groups that have computers and offers advice for nonprofits who want to buy one. The authors are convinced that the best way for groups "on the brink" to save money and grief is to turn to other nonprofits who already have taken the plunge. The reprint also includes a list of groups and individuals around the country who are helping nonprofits get the most out of computers.

**Basic Computer Knowledge for Nonprofits—Everything You Need to Know Made Easy.** VOLUNTEER—The National Center and The Taft Group. 250 pp. 1985. \$25.00 + \$3.25 postage/handling (unless prepaid). Order from: Volunteer Readership, 1111 N. 19th St., Suite 500, Arlington, VA 22209, (703) 276-0542.

This new manual offers vital knowledge a nonprofit needs *before* exploring computerization. Its easy-to-use format is divided into the following sections:

*Section 1:* The Computer's Role; Is Computerization Appropriate for Your Organization?  
*Section 2:* Does Your Organization Need a Microcomputer? Step-by-Step Require-

## Resources

ments for Analysis/Needs Assessment; The Consultant Method; The Piecemeal Solution Alternative; The In-House Computerization Plan; Self-Proposal Outline; Needs Assessment Forms

*Section 3:* Building Computer Comfort; Making a System Decision; Printer/Software Configuration; Supplies; Bibliography

*Section 4:* Introduction to Word Processing; Five Major Elements to Consider; Hardware Requirements; Bibliography

*Section 5:* Basics of Data Base Formation; The Application of a Relational Data Base; Software Selection; Equipment Requirements; Bibliography

*Section 6:* Introduction to Spreadsheets, Applications, Spreadsheet Software; The Concept of a Template; Spreadsheet Commands and Functions; Bibliography

*Section 7:* Introduction to Telecommunications; Applications; Services/Features of Communication Services; Hardware Requirements; Communication Software; Selection; Reflections of a User; An Application Story; Bibliography

*Section 8:* Collaboration Strategies for Nonprofit Computer Users; Applications; Computer Learning Opportunities; User Groups; Computer Training Labs, Workshops; Computer Sharing; Agreements on Standards and Operations; References

**Computer Awareness Workshop Kit.** VOLUNTEER—The National Center, 1985. \$25 + \$3.25 shipping/handling. Order from: Volunteer Readership, 1111 N. 19th St., Suite 500, Arlington, VA 22209, (703) 276-0542.

A packet of workshop curriculum and audio/visual materials on computer awareness for nonprofits. Topics cover computer needs assessment and introduction to computer concepts, and there are tutorials on word processing, file management, spreadsheets and communications. Materials include a 200+ page workbook, scripts for five slide/tape

shows and a 60-page instructor's guide. (If you choose to conduct the workshop, VOLUNTEER will provide you with a workbook for each attendee and loan you the five slide/tape shows at a cost of \$15 per attendee.) The slide/tape shows, containing over 350 slides, may be purchased separately for \$295.

**VOLNET.** An electronic mail/news service for members of the volunteer community. For information on how to join and equipment requirements, contact Denise Vesuvio or Patrick Saccomandi at VOLUNTEER—The National Center, 1111 N. 19th St., Suite 500, Arlington, VA 22209, (703) 276-0542.

VOLUNTEER launched VOLNET in January to provide three important communications services for its members:

—Direct electronic mail service to and from VOLUNTEER and its membership

—Direct electronic mail service between VOLNET members

—A weekly news and information service on the volunteer community containing from five to eight pages of text

By January 1986, VOLNET's services will expand to include

—On-line database of Volunteer Centers and their services

—On-line database of volunteer field-related bibliography

—Regular updates of VOLUNTEER's membership directory

—Reviews and abstracts of volunteer field-related periodicals and publications

—Teleconferencing on major issues affecting volunteering and nonprofit management

—Calendar of training events

—Descriptions of VOLUNTEER's upcoming events and activities

—Travel schedule of VOLUNTEER staff and national trainers

—Individual mailboxes for personal mail

VOLNET members also receive services offered by VOLUNTEER's telecommunications vendor, such as economic databases and general news wire reviews.