

SOMERSET SCOUTS TRANSFORMATION GUIDES

#1 COMPASS CLEAN UP – PHASE ONE

2	Background
2	Who is involved
3	Personal Details
4	Updating roles and training
5	Occasional Helpers
6	Undelivered E-mail addresses
7	Appendix 1 - Compass Permissions Chart
8	Appendix 2 - Help
11	Interim Updates
11	Final Report
12	What Next ?

BACKGROUND

A key driver of the whole Transformation programme will be the introduction and utilisation of a new Membership system. This will be accessible to all adult volunteers through a single sign on from within the Scouts.org.uk Web pages. The new system will incorporate three areas covering

- New member joining
- Membership Records
- Learning

To avoid significant amounts of data being manually input to the new system in 2023, arrangements will be made for a central transfer of data from the current Compass system. It is particularly important that Compass is fully ready for transition by every Group, District and County. This will smooth the transition process and lead to many fewer puzzled volunteers after the transition has happened for each of them.

The task of “cleaning up” Compass is a significant piece of work, and all are indeed involved to ensure that personal membership records and details are correct ahead of any transfer. This will take time and considerable engagement with a few having responsibility to conduct and complete the requirements.

The initial requirement is to undertake the four topics listed below.

- a) Confirming that every volunteer’s personal details are up to date on Compass
- b) Updating volunteers’ roles and training
- c) Closing Occasional Helper “roles” that are no longer needed
- d) Remove any undeliverable email addresses

In the future, 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. More details will be provided later (during 2023).

WHO IS INVOLVED ?

The Clean Up will require everyone who has a current record on Compass to be contacted. This, however, will be undertaken and co-ordinated at Group, District and County levels by the lead manager in each case; Group Scout Leader (GSL), District Commissioner (DC) and County Commissioner (CC) with the support of those who hold an appointment as an Administrator on Compass at the relevant level.

Notes:

1. The appointments need to be at “Full” status on Compass.
2. Where a full appointment of the above lead manager is unavailable, the District Commissioner / County Commissioner will advise who will be asked to undertake the levels of action and responsibility.

Ahead of providing the detail and requirements for each of the above, thank you for your help in leading this important first stage of our transition preparation.

PERSONAL DETAILS

We need to confirm that every volunteer's personal details are up to date on Compass

The Ask

The aim in all this work is to make sure that the personal data held on Compass for each of our volunteers (including Occasional Helpers (OH)) 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 fantastic opportunity to update the data as much as practicable.

The Reason

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. Others may be more recent, a change of an e-mail address or a new mobile phone number for instance. 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.

The Data

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.

*Whilst Emergency Details are required at this stage, volunteers should also be encouraged to complete / update their Medical Details

**Not applicable for Occasional Helpers.

Ideally, the best person to check each volunteer's record would be 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, a general 'please update your Compass record' email sent from 'County' to each volunteer is very unlikely to have the desired effect.

You will know the best way forward for your Group, District or County. To help, you will be provided with an Excel Spreadsheet which will detail all those who have appointments that are related to your Group, District or County. This may include Scout Active Support Units, Executive Committees, other Supporters, and any Occasional Helpers.

The permissions that sit within Compass will allow a line manager; GSL, DC or CC to edit Personal Details and Communication Details but only the individual themselves can edit Emergency Details**.

**If an individual's emergency details are incorrect, if they are unable to correct themselves, ask them to send you revised information by e-mail and these can be forwarded to and amended by a Commissioner or an Appointments Secretary.

The Action

To complete this first element, it is recommended that you look at the individuals record online with them and make the necessary changes. If this is not practical, you should print off the Personal Details, Emergency Details and Communications Details by selecting each one and then "Send to PDF." Please

remember, you will be exporting data from Compass so ensure that you retain and dispense with the printed data when the task is complete so that you comply with the Data Protection Act.

It is essential that all elements are completed and no gaps in any of the three Sections (Personal, which includes ensuring a live e-mail address, Emergency & Communications). This ensures complete records.

Note: Before undertaking a review and contacting any Occasional Helpers, it is suggested that you look at, and complete the actions on page 5. In addition, as Occasional Helpers are not members of the Scout Association, there is no requirement for them to have any Communications Details completed.

Once you have completed the activity, please mark the Excel Spreadsheet as “COMPLETE” for the FIRST element against each name and continue to work through all named entries until your Group, District or County records are complete.

VOLUNTEER ROLES & TRAINING

We need to make sure that any current roles are recorded correctly, and any “old” roles closed. Line managers can also review and remind individuals where mandatory training or Getting Started modules are outstanding. Once completed, this will allow for Training Teams to ensure that the appropriate schemes are in place and completed training, duly recorded.

The Ask

All volunteers record needs to be checked to ensure that Compass lists all their active appointments. Where relevant and appropriate, completed essential training can be updated.

The Reason

It is important that all active (and historic) roles and all training (including mandatory ongoing 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 log 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.

In addition, the migration will see the need to map individual appointments to the roles they support. Having multiple or ambiguous appointments will not transition to the new system and therefore need to be corrected now.

The Action

To complete this second element, you need to look at all the teams that you manage to make sure that all volunteers' current roles are accurately recorded on Compass. In some cases, you may need to refer to others ahead of this activity. Please close roles which are no longer active, including inactive Scout Active Support Unit (SASU) members, Skills Instructors, Supporters or Executive Members.

In some cases, you will need to add roles where this will help the transition process, particularly 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 ‘close’ one of the variants, but also add a new Section Assistant role for the other variant. For details about Role Variant, see Appendix on Page 8. Whilst this will create two or more appointments against an individual that look similar, it will ensure appropriate mapping.

Additionally, some roles are particularly unclear and will cause issues at transfer. For example, “Group Section Assistants” recorded on Compass. Each of those should be a Section Assistant with a (or more than one if appropriate) specific Section rather than with the Group. Again, the Group Section Assistant appointment needs to be closed and one new appointment opened for each Section supported.

If you are holding any completed Getting Started or Ongoing Learning Certificates, please ensure that these are added.

Lastly, as part of this task, please make sure that every nominated / elected / co-opted current member of the 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. There is no need to look to add Section Leaders if they are not currently members of the Executive Committee. We are just looking to capture correctly the current “as is” position.

Once completed, please mark the Excel Spreadsheet as “COMPLETE” for the SECOND element against each name and continue to work through all named entries until your Group, District or County records are complete. When all are completed, it will allow a Training Manager to review all appointments and ensure that the correct training scheme and component elements are captured on Compass.

OCCASIONAL HELPERS

We need to review all currently recorded Occasional Helpers (OH) that appear on Compass and close any that are no longer active or needed.

The Ask

You are asked to review all OH roles locally and close any which are no longer active or required. This should leave you with just those who are engaged with Group activities. As an indicator, consider any that have not been involved in a Group activity since return to Scouting “post-pandemic” as unlikely to remain active and close down. It is always possible to reopen if there is a need at a later date.

Remember, Occasional Helpers are a Group resource and not an alternative for adults who are providing regular or semi-regular assistant to a Section or the Scout Group. See also POR Rule 16.7.2.

The Reason

We currently have just over 1,000 OHs recorded on Compass in Somerset and this is like many other Counties in England of comparable size (by Group numbers). A number of these OH ‘roles’ are no longer connected with Scouting or are ‘inactive’ and can be misleading when looking at the adult support given to our Scouting in the county. A substantial 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” is not needed for any volunteer who also has, on Compass, an active role which requires a criminal records check (a disclosure).

As part of the planning for the changeover there will need to be a (normally short) conversation with each of the volunteers recorded on Compass (including OH's) when migrating to the planned Section, Group, District, County model.

On the new Membership System, OH's will be given a different (new) role title. They will still not be a member of the Scouts but will have a record on the membership system and will therefore need a review of their Personal Details.

The Action

To reduce the number of these conversations, it makes sense for Groups, Districts and Counties to close now, the records for OHs in the following circumstances:

- those who will not realistically contribute between now and when their current criminal records check expires.
- those where the OH entry is a duplicate for a volunteer who is a member and currently also has a role that requires a DBS (criminal records check). This is most common with Section Assistants or Executive Committee Members.

Once you have completed the activity, please mark the Excel Spreadsheet as "COMPLETE" for the THIRD element against each name and continue to work through all named entries until your Group, District or County records are complete.

UNDELIVERABLE E-MAIL ADDRESSES

We need to make sure that all e-mail addresses that appear on Compass are live and correct.

The Ask

Remove or correct each 'undeliverable' email address from volunteer's records on Compass to ensure that Compass contains only valid email addresses. You will be advised of any such addresses known to the County. This will be from County generated mailings or Headquarters generated mailings where an "undelivered" response is received.

The Reason

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.)

The Action

When checking with individuals, please be meticulous about the mail address as often letters are missing / incorrect which means that mailings are undeliverable. UK Headquarters has provided a list of email addresses that were undeliverable from a recent all-members' email. If your Group, District or County has one or more of these identified addresses, it will be annotated on your spreadsheet. Please check with the individual and amend as appropriate.

APPENDIX 1 - COMPASS PERMISSIONS CHART

The Chart identifies, against a selection of appointments, what changes can be made to the data and records in Compass.

The columns, highlighted yellow relate to those elements of Compass records that may be required to add, delete, or amend as part of this work.

For any administrative change to an area, the relevant appointment of the volunteer making the changes must be “Full” on Compass.

Please ensure that if you have more than one appointment in Compass that the relevant one appears in the My Roles section at the top of the landing page.

Role	Training (Own)	Emergency Details (Own)	Communications Details (Own)	Account Details (Own)	Member Details (Adult) (Others)	Change title, forename and surname	Update Date of Birth (Others)	Contact Details (Others)	Marketing and Mailing Details (Others)	Emergency Details (Others)	Add Adult	Adult Member Training	Amend validated adult training	Mandatory OGL	Maintain Member Roles (Roles)	Maintain Section Location (Roles)	End Full Roles
Appointments Secretary	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	Edit	Edit	Yes	No - Updated	No	View	Yes	Edit	Yes
Commissioner	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	Edit	Edit	Yes	View	No	View	Yes	Edit	Yes
Commissioner (Acting)	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	Edit	Edit	Yes	View	No	View	Yes	Edit	Yes
Explorer Scout Commissioner	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	View	View	Yes	View	No	Edit	No	Edit	Yes
Group Scout Leader	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	View	View	Yes	View	No	View	No	Edit	Yes
Group Scout Leader (Acting)	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	View	View	Yes	View	No	View	No	Edit	Yes
Scout Network Commissioner	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	View	View	Yes	View	No	Edit	No	Edit	Yes
Scout Active Support Manager	View	Edit	Edit	Edit	Edit	HQ Only	HQ Only	Edit	View	View	Yes	View	No	Edit	No	View	Yes
Training Manager	View	Edit	Edit	Edit	View	HQ Only	HQ Only	View	View	View	No	Yes	Yes	Edit	No	No	No
Group / District Administrator	View	Edit	Edit	Edit	View	HQ Only	HQ Only	Edit	View	View	Yes	View	No	View	No	No	Yes
Deputy Commissioner	View	Edit	Edit	Edit	View	HQ Only	HQ Only	View	View	View	Yes	View	No	Edit	No	No	Yes
Appointment Chairman	View	Edit	Edit	Edit	View	HQ Only	HQ Only	View	No	View	No	View	No	View	No	No	No
Chairman	View	Edit	Edit	Edit	View	HQ Only	HQ Only	View	No	View	No	View	No	View	No	No	No
Secretary	View	Edit	Edit	Edit	View	HQ Only	HQ Only	View	No	View	No	View	No	View	No	No	No

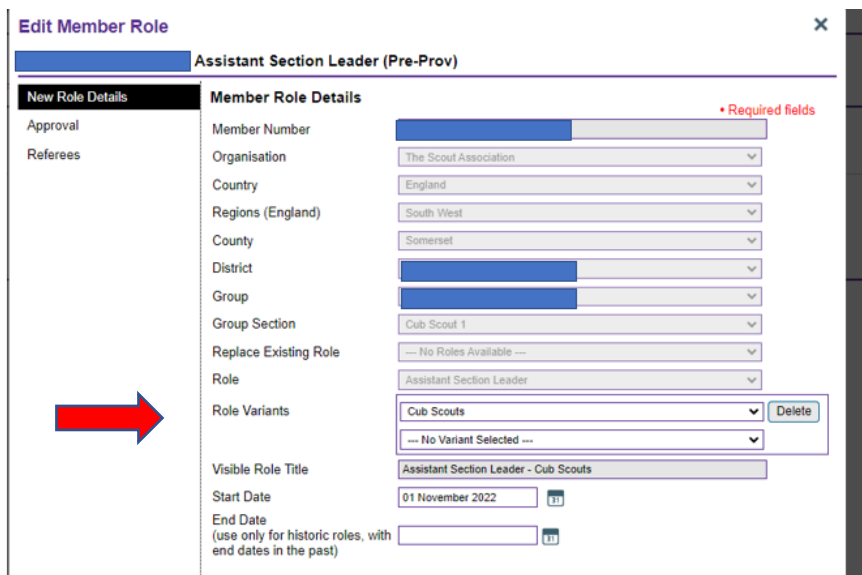
APPENDIX 2 - HELP

Here are some pieces of information or links to guidance to assist you with these tasks.

ROLE VARIANT

This stage is required whenever a new appointment is added to Compass. Whilst no direct impact on the individual, the category selected appears on Compass reporting and is important to identify the operating Section or Category.

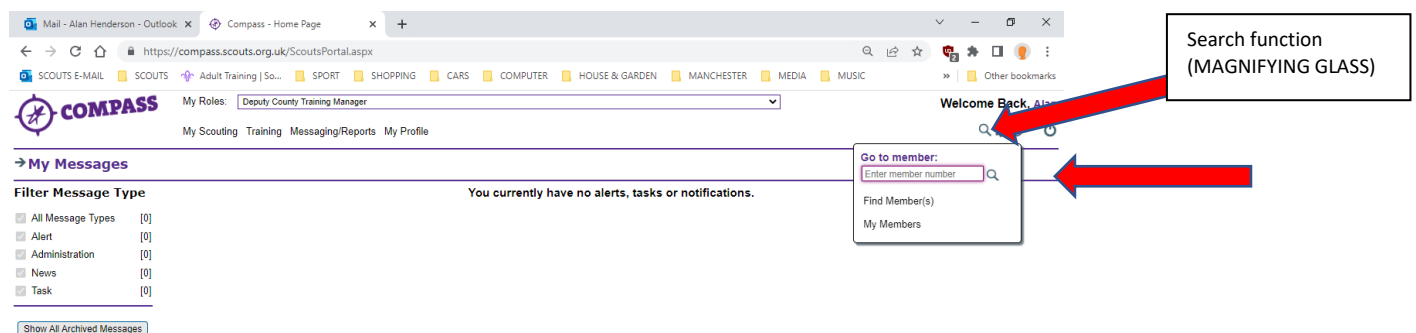
Select the correct option from the drop down menu and save



PRINTING OFF AN INDIVIDUAL'S DETAILS FROM COMPASS

If you need to extract a print of information to assist with data update then follow these instructions. Please remember that it is your responsibility for the safe transportation, storage and destruction of the information as set out in the GDPR requirements.

First, having logged onto Compass in your appointment as a line manager (GSL, District Commissioner, ASU Manager etc). From the search function (magnifying glass), if you know the membership number, enter this and press "enter"



If you do not know, click on Find Member and you will get the following screen from which you can add either Forename or Surname or e-mail address. This will either return one or many results from which you can select the individual details required.

The screenshot shows a web application window titled "Find Member(s)". On the left is a sidebar with search options: "Basic Search" (selected), "Advanced Search", "Permit Holder Search", and "Assessor Search". The main area is titled "Basic Search" and contains the following fields:

- Member number: [text input] with a magnifying glass icon.
- Personal Details section:
 - Forenames: [text input] with an information icon.
 - Surname: [text input] with an information icon.
 - Email address: [text input]
- Roles section:
 - Role level: [dropdown menu] with "-- Select Role Level --" as the selected option.
 - Role: [dropdown menu] with "-- No Roles Available --" as the selected option.

At the bottom of the window are three buttons: "Close", "Clear", and "Search".

Once you have the records you require, select either Personal Details, Emergency Details or Communications and then select "Send to PDF" You will need to select these and print off individually. There is not one "all report" option in Compass.

The screenshot shows the Compass web application interface. At the top left is the Compass logo. To its right is a dropdown menu for "My Roles" showing "Deputy County Training Manager". Further right is a "Welcome" message and a search icon. Below the header is a navigation bar with links: "My Scouting", "Training", "Messaging/Reports", and "My Profile". The main content area shows the user's name "00087317 Alan Henderson" and a list of tabs: "Personal Details" (selected), "Roles", "Permits", "Training", "Awards", "Emergency Details", "Communications", "Visibility", and "Disclosures". Below the tabs is a "Personal Details" section. In the top right corner of this section is a "Send to PDF" button, which is highlighted by a large red arrow.

What you will get is something like this

The screenshot shows a "Scouts Data Export" report. At the top left is the Compass logo. To its right is the title "Scouts Data Export" with the date "Date : 11 February 2023" and the user "By : 00087317 Alan Henderson". Below this is the user's name "00087317 Alan Henderson" and the section title "Personal Details". A note states: "Certain information is only visible to members viewing their own profile". Below this is a profile picture placeholder and a table of personal details:

Name:	Mr Alan Peter Henderson
Known As:	Alan
Member No:	00087317
Date of Joining:	16 June 1977

VIEWING AND EDITING EMERGENCY DETAILS

In its blank format, the spreadsheet looks like this

[illegible]

Once you have started to confirm information under each of the headings, using the drop down arrow which is visible when you click over the cell you will see

[illegible]

Click on the arrow to get the only option which is CONFIRMED which you should select to populate the cell, as below

USE DROP DOWN MENU TO RECORD AS CONFIRMED WHEN COMPLETED			
PERSONAL DETAILS	E-MAIL ADDRESS	EMERGENCY DETAILS	COMMUNICATION PREFERENCES
CONFIRMED	▼		

Continue to do this for all volunteers across all 4 (3 for Occasional Helpers) columns like this below

USE DROP DOWN MENU TO RECORD AS CONFIRMED WHEN COMPLETED			
PERSONAL DETAILS	E-MAIL ADDRESS	EMERGENCY DETAILS	COMMUNICATION PREFERENCES
CONFIRMED	CONFIRMED	CONFIRMED	CONFIRMED
CONFIRMED	CONFIRMED	CONFIRMED	CONFIRMED
CONFIRMED			
CONFIRMED			

Please remember to save the spreadsheet after adding new entries.

INTERIM UPDATES

To check progress and identify any concerns or problems, an interim update will be requested from the Transformation Lead approximately four weeks after issue of these instructions and the data spreadsheet.

It is important that this work is started as soon as practical so that it can be completed in early 2023.

If, however, you complete the task ahead of the interim request, please do not wait for the communication but send the completed spreadsheet to Transformation@somersetscouts.org.uk

FINAL REPORT

The Transformation Lead will advise you when they would hope that you had completed all elements of the work required here. By this date, you should send the completed spreadsheet to Transformation@somersetscouts.org.uk

WHAT NEXT

The information, as indicated by the completed spreadsheet will be checked and any errors, omissions or anomalies checked with the submitter. Once complete, some elements will be passed to other volunteers to complete their tasks such as checking members training schemes and completion.

This is the first in a series of actions and activities that will be required throughout 2023 as we prepare and plan for the delivery of the Transformation Programme.

Thank you for all you help and efforts in completing this.

Alan Henderson
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