

SYSTERS

AN ANITA BORG INSTITUTE COMMUNITY

Volunteer Management System (VMS)

Requirements Document

April 28, 2014

Document Change Control

The following is the document control for the revisions to this document.

Version Number	Date of Issue	Author(s)	Brief Description of Change
0.1	4 Apr 2014	R.Robinson	Initial document

Definition

The following are definitions of terms, abbreviations and acronyms used in this document.

Term	Definition
ABI	Anita Borg Institute
VMS	Volunteer Management System

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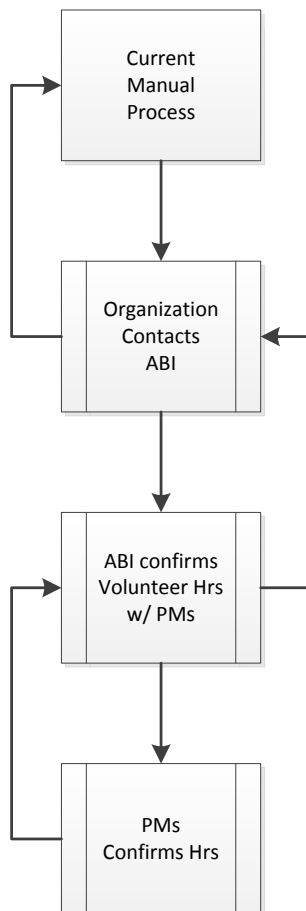
Overview

1. Background

Systers has many volunteers and potential volunteers that offer their skills, time and commitment to our vision. However, there is no system in place to track volunteers, their hours, and run reports. Many volunteers actually track and report their volunteer hours with Systers/ABI to their employers. The employers in turn may provide an incentive and often times match their hours volunteering with a monetary donation to the institute.

Additionally, as part of their internal current process (Figure 1), companies contact ABI finance department to verify hours worked by their employees/volunteers that was reported. ABI finance confirms volunteer hours with Systers program manager and has to send that confirmation back to the company. The new implemented VMS will manage volunteer contact information, track hours and events they worked, and providing reporting functionality at the least. The objective of this document is to define requirements for Systers volunteer management system (VMS) and define future implementation like VMS plug-in for integration with CRM e.g. Salesforce or other web applications.

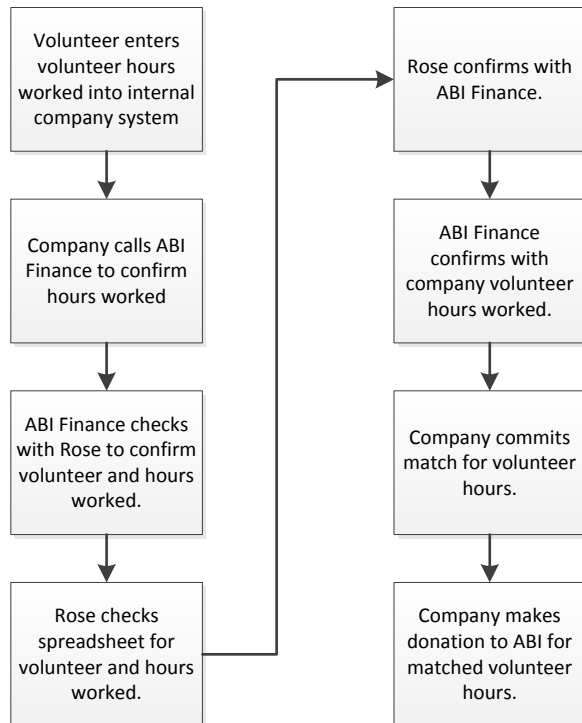
Figure 1 Current Process



A. The Problem and Challenges

The main problem of our volunteers is that we have no way to track our volunteers except through manual methods (emails, separate excel documents, phone contact). From an administration perspective, some of the volunteers report volunteer hours through their own company's volunteer system which initiates a confirmation process with ABI. Additionally, these volunteer hours are often matched by the companies and involved ABI finance department who must confirm all volunteer hours. Sysfers program manager currently has no way of running reports by individual volunteers, overall volunteer hours reporting or how matched donations reflect volunteer hours. The new volunteer management system approach must include several user scenarios in the scope.

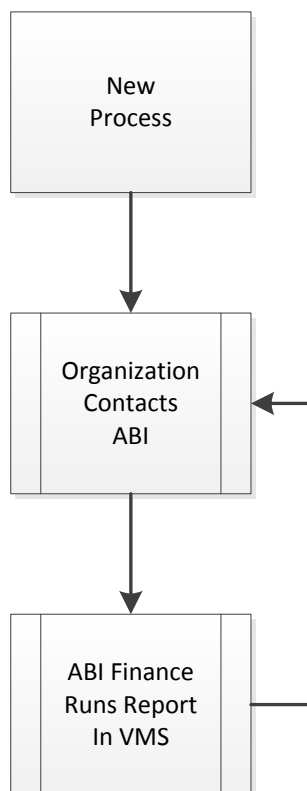
Figure 2 Example of Current User Scenario



B. Scope

The scope of the VMS is defined in phases with the initial implementation to track volunteers contact information, track hours, and reporting. There are also different user scenarios that must be addressed: 1) administrator, 2) user/volunteer, and 3) reporting. Additionally, it will have a new process (Figure 2) of notifying specific responsible parties of managing volunteers and the hours they worked through automated features. VMS reporting will enable community program manager to track volunteers hours worked through automated communication emails.

Figure 3 New Process



Functional Requirements

With many of our Systers communities, many define themselves within a special location or focused groups. Some of the determining factors of starting a community are: sharing similar cultural backgrounds, special interests or topic areas, and geographic location. Each community entity also creates their online space for engagement. But the real problem is how to bring all of these online communities into one organized communication place for our members. To find a solution starts with defining some of the challenges we currently face.

The following user case is addressed:

- Administrator
- User/Volunteer
- Reporting

1. Administrator Functionality

Administrative functionalities for the new VMS should include:

A. Enter volunteer contact information

Administrator should be able to enter volunteer contact information.

B. View volunteer contact information

Administrator should be able to enter volunteer contact information.

C. Map existing volunteer contact information

Administrator should be able to map volunteer to existing Salesforce customer contact. If volunteer is employed with a partner/sponsor, there should be some mapping to indicate this in the VMS.

D. Track volunteer hours

Administrator should be able to view/edit volunteer hours worked.

E. Assign volunteer to a job

Administrator should be able to assign a volunteer to a particular job/task/event.

F. Run various reports

Administrator should be able to run various reports.

2. Volunteer Functionality

Volunteers must be able to record their volunteer hours worked in application. Application will automatically update their volunteer record.

A. Submit Volunteer Application

Volunteers should be able to complete a [volunteer application](#) online. Application should include:

- Enter their information on VMS.
- Their information should automatically be updated in our VMS.
- Enter their desired volunteer role and upload a resume or other documents to support their skill set that they can offer.

B. Electronically Sign Volunteer Agreement

Volunteers should be able to sign [volunteer agreement](#) online.

C. Update their Volunteer hours Online

Volunteers should be able to enter their volunteer hours online.

3. Reporting Functionality

To ease the process of manual communication for confirming hours, reporting functionality facilitates accuracy in confirming volunteer hours worked.

Some of the reporting features should include:

A. Administrative Reports

Program Managers and Finance departments should be able to run reports based on the following:

- 1. Individual Volunteer Hours**
- 2. Period (Months, Annual) Volunteer Hours**
- 3. Event Volunteer Hours**
- 4. Organization (Company, Partner, Sponsor, Affiliates) Volunteer Hours**
- 5. Program Volunteer Hours**

B. Volunteer Reports

When entering their volunteer hours, each volunteer should be able to receive a confirmation report of hours entered.

- 1. Individual Volunteer Hours by Month, Year, Event, Job/Task**
- 2. Individual Volunteer Hours by Partner/Sponsor**
- 3. Available Volunteers by Region/City, Job/Task**

Appendix

Volunteer Application

The form below is a PDF format that can be distributed via email or Adobe Acrobat Pro. However, to integrate with VMS, we should have a volunteer application form that potential volunteers can complete from VMS and printed.

Volunteer Application

Date:

Name:

Address:

State/Province:

Zip/Postal Code:

SS Number:

Primary Email:

Alternate Email:

Which specific Anita Borg Institute program(s) are you most interested in getting involved with as a volunteer?

☐ Grace Hopper Celebration North America

☐ Grace Hopper Celebration India

☐ Systems

☐ Women of Vision Awards

☐ Top Company Workshop

☐ Technical Executive Forum

☐ GHC Communities

If you are responding to a specific call for volunteers, please name or describe it here:

What specific tasks are you most interested in performing as a volunteer?

What specific skills or experience do you hope to contribute as a volunteer?

What specific skills or experience do you hope to gain as a volunteer?

Will you commit to the following responsibilities? Select each item you commit to.


☐ Complete Volunteer Agreement

☐ Keep your Volunteer Coordinator informed on status of your assignments.

☐ Immediately communicate changes in your availability for timely completion of volunteer assignment(s).

☐ Respond promptly to messages and inquiries from your Volunteer Coordinator.

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Briefly describe your previous involvement with the Anita Borg Institute or its programs, including Grace Hopper Celebration. This can include specific events or online communities you've participated in, email subscriptions, volunteering, etc.:

Do you currently receive the Anita Borg Institute e-newsletter: (Yes/No): *

If you answered No, would you like to receive it?

What questions do you have about volunteering with Anita Borg Institute?


What else would you like us to know about you?

Contact Information

If you have questions about the Volunteer program, please contact:
Rose Robinson, Systems Program Manager at Anita Borg Institute: rosarob@anitasborg.org.

Volunteer Agreement

After submitting a volunteer application and program manager reviews each application, those chosen must complete a volunteer agreement form. The form below is a PDF format that can be distributed via email or Adobe Acrobat Pro. However, to integrate with VMS, we should have a volunteer application form that potential volunteers can complete from VMS and printed.



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ABI Volunteer Agreement

Scope of Responsibility

I agree that I will act within the scope of my volunteer responsibilities as described in the position description for <position>, and to abide by all program policies and procedures provided in the ABI Volunteer handbook, policy manual, and other guidance.

Confidentiality

I understand that in the course of my work as an ABI volunteer, I may have access to sensitive and confidential information about programs and other personal information. I agree to keep such information confidential and to use it only to perform my duties as an ABI volunteer to the extent that a ABI explicitly authorizes it. I also agree to restrict my discussion of any programs.

Conflict of Interest

I understand the vision of ABI and I also understand that as an ABI volunteer, I cannot promote any personal, religious, or business interest while engaged in ABI work. I agree not to solicit any organization towards ABI. I also agree to report any potential conflicts that may arise during my service as an ABI volunteer to my volunteer supervisor and/or coordinator.

Time Commitment

I commit to working the appropriate hours for specified volunteer role during the program. If there are any changes in my personal and/or professional life that may affect my commitment, I agree to contact the volunteer supervisor and/or coordinator appropriately and help with finding a replacement.

By signing below, I confirm that I understand and agree to the volunteer agreement described above.

Your electronic Signature (enter your name):

☐ By checking this box, I agree with the statements above.

Contact Information
If you have questions about the Volunteer program, please contact:
Rose Robinson, Systems Program Manager at Anita Borg Institute: rose@anitaborg.org.