

Spanish Red Cross

Informative note: proof of concept for the deployment of web software for volunteer management

BRIEF DESCRIPTION

This document presents the main elements of the initiative to deploy volunteer data management software for National Societies.



Informative note: experiment for the transfer of web software for volunteer data management

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01. context:

One of the lines of work of the volunteering data management team of the Volunteering Alliance is to study options for the identification of volunteer data management software for National Societies that may have an interest in this type of product. The project team, led by the Spanish Red Cross, has pre-identified a web-based technology solution from a software provider. Furthermore, it intends to identify National Societies interested in adopting and deploying this web software.

02. objective:

To identify National Societies interested in participating in the deployment of a volunteering data software package. In the framework of this initiative, subsequent support for upgrades and corrections over a three-year period will be provided.

03. What are the elements that characterise the pre-identified software?

Open-Source Software

The identified software company works with open-source software environments and tools, based on the software package CiviCRM (www.civicrm.org).

The main reason for the decision to work with an open source solution is that it does not entail a regular payment of licenses per use. The final purpose of this initiative is for the Spanish Red Cross to support the use of an efficient and sustainable system of management of the data and information of people, linked to interested National Societies.

Additionally, the project contemplates ensuring the Spanish Red Cross' support, for a period of three years, to National Societies that decide to adopt this online software, in hosting servers, and in developmental and corrective measures. After that time, the user National Society will be responsible for the developmental and corrective measures that they want to implement.

Support for a period of 3 years

The software development company, through the Spanish Red Cross, will provide help and technical support for possible corrections, bugs, updates and development, for a period of three years, taking into account that the software transfer requests, and the possible development and correction measures that may be requested by National Societies, will not be synchronous. The Spanish Red Cross will also provide the hosting of the software and data in a secure and anonymised manner for this period.

Multilingual

The software will be operable and available in the French, English, Arabic, Russian and Spanish languages. In addition, it must be easily adaptable and configurable for use in other languages, different from the ones specified previously. The adaptation to other languages, different from those indicated, will be assessed case by case, within the support framework indicated in the previous section.

Operating system and web navigators

The user-side software is web-based, so it is capable of working in Windows environments and with the latest versions of most browsers on the market (Edge, Chrome, Firefox, Safari).

Network software

A software has been identified in which the user from the National Society can have access, via the web, with a username and password. The package contemplates the fact that, in some contexts, internet access is limited or non-existent. In these cases, the software will have an extension that will allow data entered offline to be stored locally, until the computer that has captured it can connect to the Internet, and the data be transferred to the server.

Hosting and data storage

The required product is a data management software package. When considering options related to hosting, we propose the option of having the data stored on the servers of the Spanish Red Cross. The Spanish Red Cross server architecture complies with European Data Protection Regulations and has high security and reliability standards.

However, the case of National Societies with data hosting possibilities on their servers will be considered. In this situation, it will not be necessary for the Spanish Red Cross to provide the storage service for the data that the user National Societies may capture. Data storage must be developed by the user National Societies. The developer company will specify the requirements that are necessary for the storage of the data on the National Society's servers.

Importing previously existing data of people

In the case that the National Society has previous data of volunteers in csv or xls format, the application allows its import. However, the National Society will be responsible for data import (including data cleaning and data preparation), with support from members of the project team.

Intellectual property

The Spanish Red Cross has prioritised an alternative in which the intellectual property of the software belongs to our organisation, and not the developer company.

Corrective and developmental measures

A procedure will be established by the Spanish Red Cross to ensure that the corrective, bugs and developmental procedures formulated by each National Society using the software, can be managed and solved in the most fluid and simple possible way. It is understood that this procedure must apply throughout the three-year support period that corresponds to each National Society.

04. organisational aspects that the National Society must have to adopt the software:

Time of dedication

The deployment of the software to National Societies interested, will involve a significant percentage of time by the Departments of that National Society with responsibilities in Volunteering and in Information Systems, whether in the Central, Regional / Provincial or Local Headquarters. Time should be dedicated:

1. To attend training processes for the use of the tool
2. To the deployment of the software system in the National Society
3. To carry out training on the use of this system to the entire volunteer structure of the National Society, at the Central, Regional and Local Headquarters
4. To the adaptation or creation of volunteer management processes, coupled with the software
5. To co-ordinate with the National Society information system staff, the preparation of data that may come into master tables, to fit the software to its needs and context
6. To the routine management of maintenance tasks, such as registering / deleting of new users, resetting access codes, identifying problems with the data and reporting failures or bugs in the software

Standards in volunteer management

It will be necessary for the Department of the National Society with responsibilities in volunteering to adopt, prior to the transfer of the software, homogeneous standards that will apply to all its layers (local / regional / national) regarding the establishment of volunteer processes. In other words, the National Society must have standards that apply equally to each and every one of its branches with regard to the information and data that are required and captured:

1. At the time of recruitment, selection, reception and entry of volunteers into the National Society, including any form used to collect personal data
2. In the training actions that volunteers may receive
3. In the record of the participation of volunteers in voluntary action
4. In the support and monitoring of the volunteer

Digitalisation and connectivity

The deployment of a volunteer data management system requires that the person, or people, with responsibilities in the Volunteer Department of the National Society at central office level, have computers connected to the Internet. The same would apply to people with responsibilities in volunteer management and in the capture of volunteer data in other layers of the National Society (local and / or regional).

The software works in Windows environments with the browsers Chrome 5+, Firefox 3.5+, IE 8+, Edge, Safari 4+, so the computers used for data capture must have these versions installed.

05. National societies interested in the adoption of the system:

National Societies interested in participating in this initiative, can indicate their interest by contacting to the project team in the following email address: fch@cruzroja.es.

The volunteer data management team will contact the interested National Societies. Interested National Societies will have to go through a simple analysis process focusing on their organisational capacities in volunteering, information systems and digitalisation.

Once both parties agree to move forward with the software transfer project, they will have to sign terms of reference that will establish the following aspects:

1. Commitments of the Spanish Red Cross to support the transfer and deployment of the system in the National Society.
2. Commitments of the interested National Society in the deployment of the software, where the conditions to be ensured in order for the transfer to be sustainable, including the necessary time dedication for its implementation of previously identified key people, will be made explicit.