

Roadmap for Selection & Implementation of Volunteer Management System

**A Guide for Social Service
Agencies**

Foreword by **Ms Tan Li San**

*Chief Executive Officer
National Council of Social Service*

As society becomes increasingly complex and our needs evolve, the social service sector needs to reinvent itself and find new solutions to challenges while having limited resources. Volunteers can play a significant role in augmenting manpower and the efficient utilisation of resources to improve service delivery and increase community engagement. As the world uncovers the importance of digital readiness in allowing continuity of our daily lives and businesses, social service agencies have turned to the use of digital means to maintain constant engagement with service users and volunteers.

The use of systems and processes in volunteer management are important elements to improve productivity and ensure volunteers are engaged meaningfully. By adopting a Volunteer Management System (VMS), volunteer recruitment, coordination and satisfaction can be easily tracked, enhancing volunteer management practices in an agency. A good VMS will also allow one to readily profile, identify and encourage volunteers to consider other forms of giving in addition to physical volunteer interactions.

Feedback from agencies have indicated that they face difficulties in identifying a suitable VMS. Agencies are unsure of their needs and requirements, and how to optimise the use of the system. To address such difficulties, NCSS developed the Volunteer Management System – Selection and Implementation Roadmap (VMS-SIR) to guide SSAs in their search, selection and implementation of a volunteer management system to increase the adoption and satisfaction rates of this technology, thereby, optimising the volunteer management capability of SSAs.

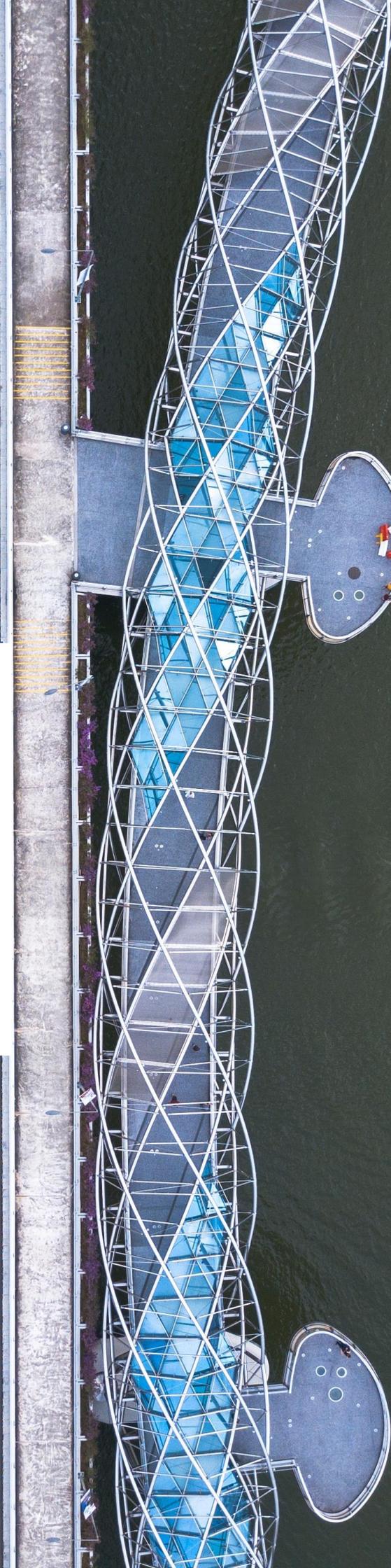
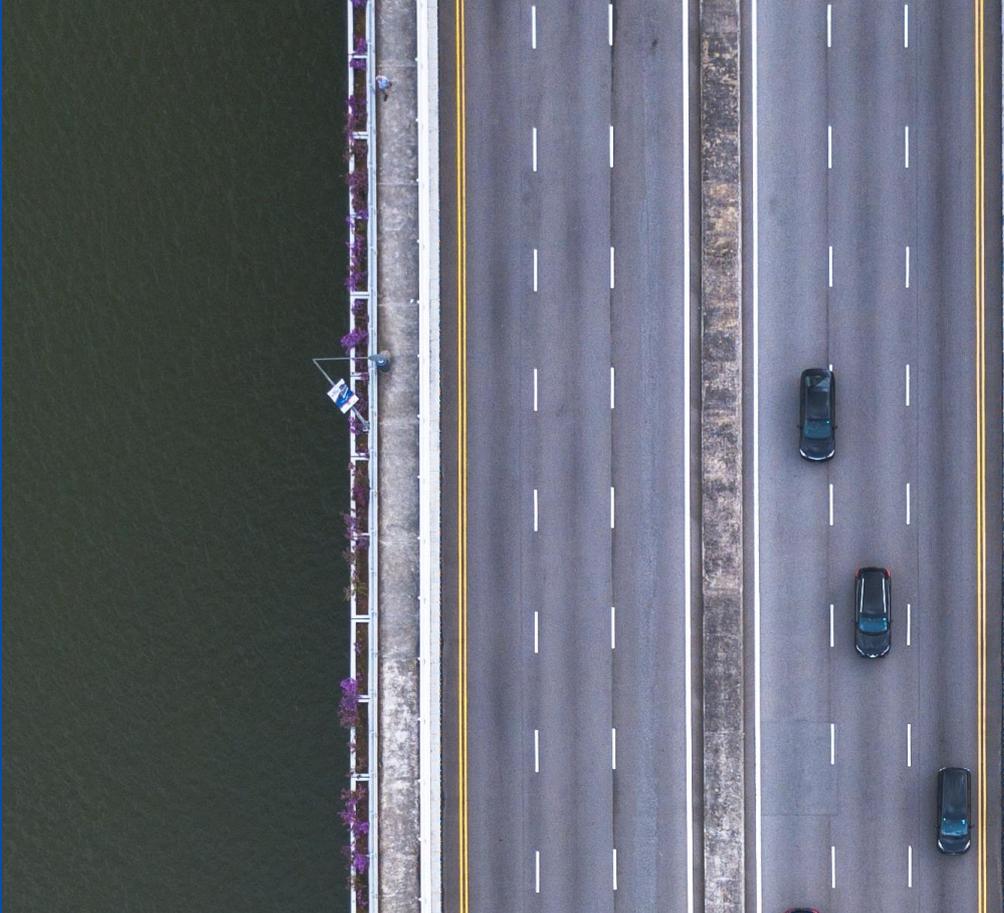
This roadmap, together with the Self-Assessment Template, provides the user with a holistic view of the factors that lead to a positive implementation of a volunteer management system. The Self-Assessment Template allows SSAs to assess their readiness and maturity and identify particular areas in the roadmap that would be useful in selecting and implementing a VMS.

We would like to acknowledge all SSAs and stakeholders including VMS Suppliers, who have participated in the interviews and focus group workshops, allowing us to better design this roadmap, and making it useful for the sector. We hope that you will find this roadmap beneficial in providing you a smooth journey in implementing and optimising your VMS.

As Singapore marches towards its goal of being a Smart Nation, we can all play a role in this transformation. Together, let's embrace and harness technology to improve the lives of those we serve.

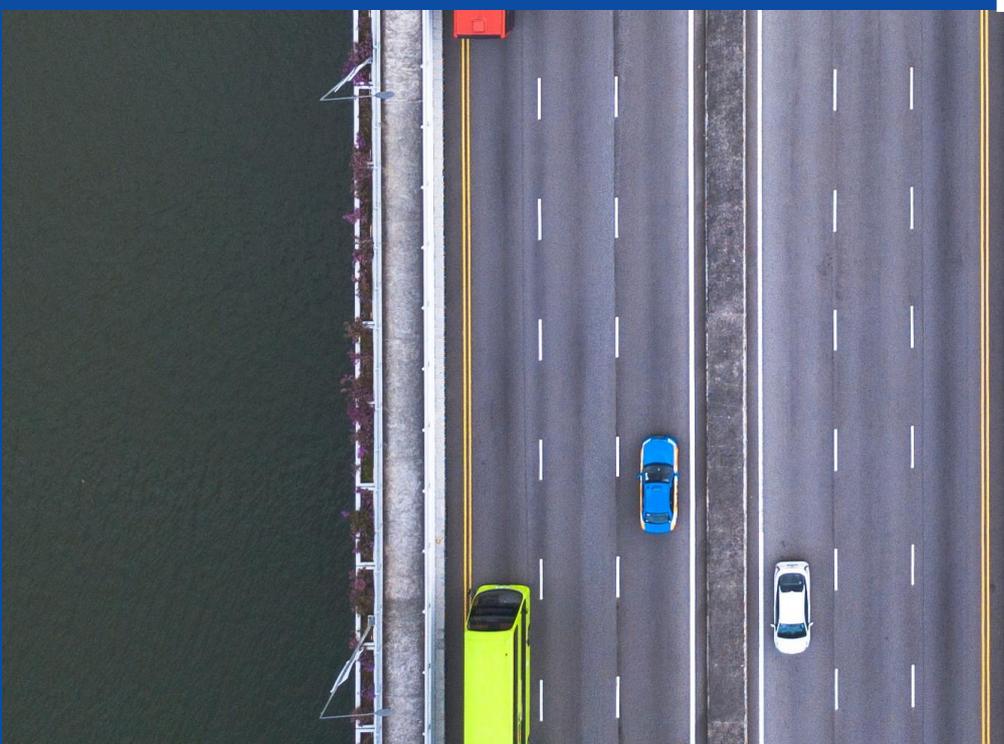
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1

Current trends of the Social Service Sector



The Social Service Sector Today

Trends and their Implications

Demographic Shifts

With an ageing population and shrinking family nucleus in Singapore, there is an increase in challenges for families to provide resources and caregiving needs for their children while caring for ageing parents. These issues will increase demand for childcare and eldercare services.

Increasing Productivity

For-profit organisations are entering the social service sector to provide services in a more cost-effective manner. Social Service Agencies (SSAs) must therefore look for new opportunities and ways to gather and better use resources available to increase productivity and deliver services more effectively.

Advancing Technology

Technology has redefined service delivery and enabled service providers to access new partners, clients and alternative sources of manpower. SSAs need to leverage new technology and transform themselves to stay relevant and sustainable.

NCSS Social Service Sector Strategic Thrusts (4ST)

The Social Service Sector Strategic Thrusts (4ST) is a five-year roadmap for the sector, co-developed by NCSS with stakeholders in the social service ecosystem. It is guided by a person-centred and holistic approach towards advancing the Quality of Life for Individuals.

Challenges

Developing highly capable and purposeful SSAs

Sustainability of the Social Service Ecosystem

Changing Needs



Empowered individuals, their families and communities

People should become more self-reliant: able to independently access resources, self-advocate, and decide on the services that they receive



Effective social purpose entities that deliver quality, innovative and sustainable solutions

Solutions should be innovative and sustainable, with a focus on improving organisational health and the experience of service users by attracting and retaining skilled professionals



Caring, collaborative and impactful social service ecosystem

Collaborative efforts across the People, Public, and Private sectors must be strengthened so that solutions can have greater impact and improve the service user experience

How Volunteers Add Value

Why are volunteers important

Volunteers contribute to community development by committing time and effort for the benefit of society. Volunteering is undertaken freely and without expectation of financial reward, but they should not be viewed as a low cost way to provide service.

Volunteers play a significant role in community building and bring significant benefits to organisations, communities and people. Organisations reap enormous contributions of time, talent and skills, and communities become more cohesive through active citizen engagement.

For the SSAs, involving volunteers in their cause can enhance service delivery and add to the quality of life of their service users. There is a constant need to build greater commitment from volunteers and create deeper connections between the individual, the organisation and their mission and values.

How volunteers can value-add to your organisation



Promoting the interests and welfare of SSAs as ambassadors



Increasing engagement with the community



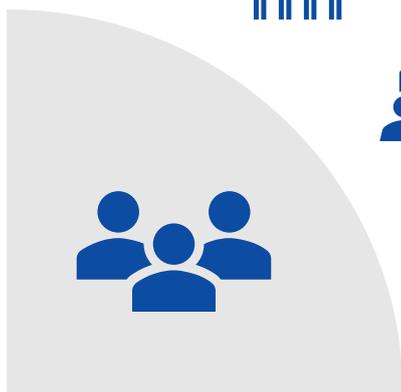
Complementing the jobs of full-time staff



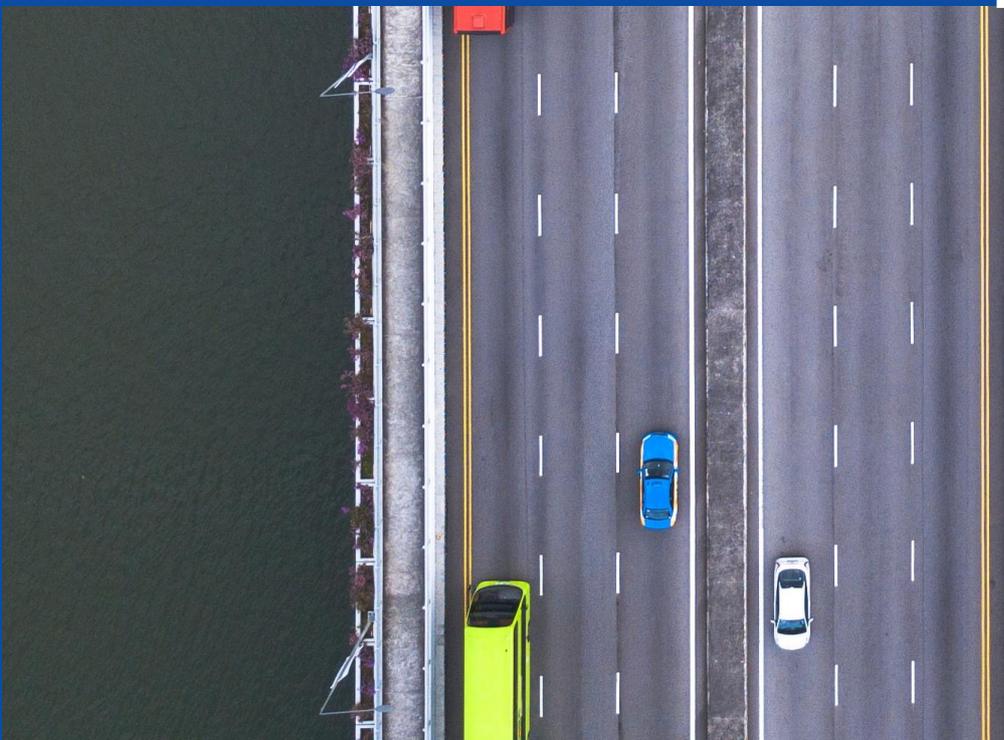
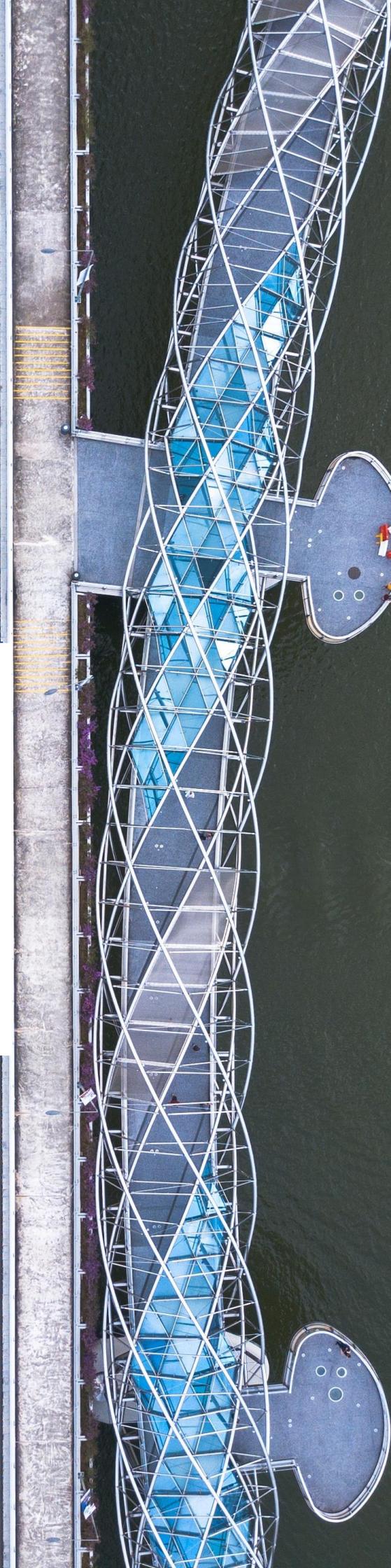
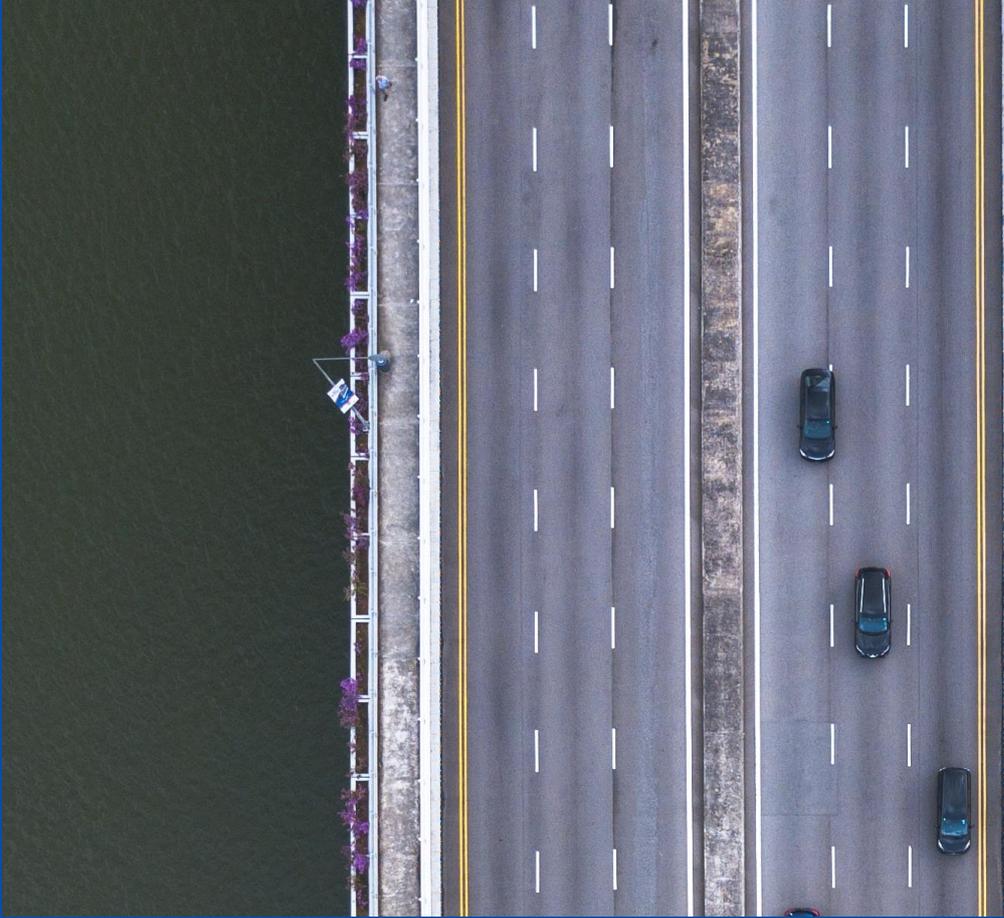
Injecting energy and enthusiasm



Bringing talent, skills and experience to augment an organisation's resources

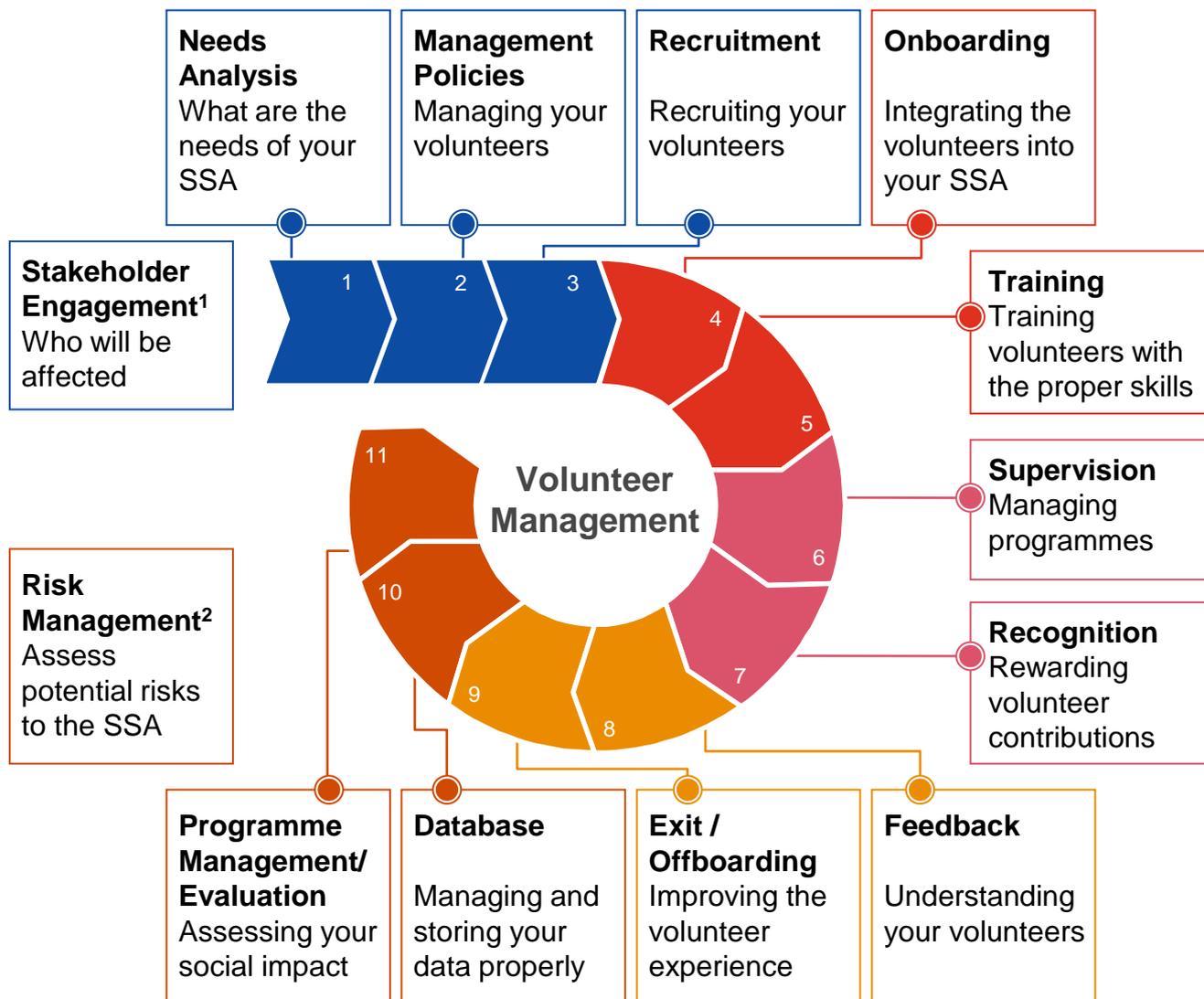


2 Managing Volunteers



The Volunteer Management Process

The Volunteer Management Process



Having a thorough Volunteer Management Process is important to track the end-to-end volunteer experience, which helps in understanding volunteers' satisfaction and what would retain them. The NCSS Volunteer Management Framework, which includes Stakeholder Engagement and Volunteer Risk Management, is a useful tool for reviewing your volunteer management processes.

¹Stakeholder Engagement is the first step and involves engaging with stakeholders (e.g. board members, senior management, staff, service users and volunteers) to understand the impact of a project.

²Volunteer Risk Management involves assessing the potential risks to your SSA, service users and other stakeholders, including the impact and likelihood of such risks and potential preventive strategies or controls. Assessment should be done if risks have changed, new volunteer roles or opportunities are identified, or there has been a change in regulation or new / revised compliance guidelines.

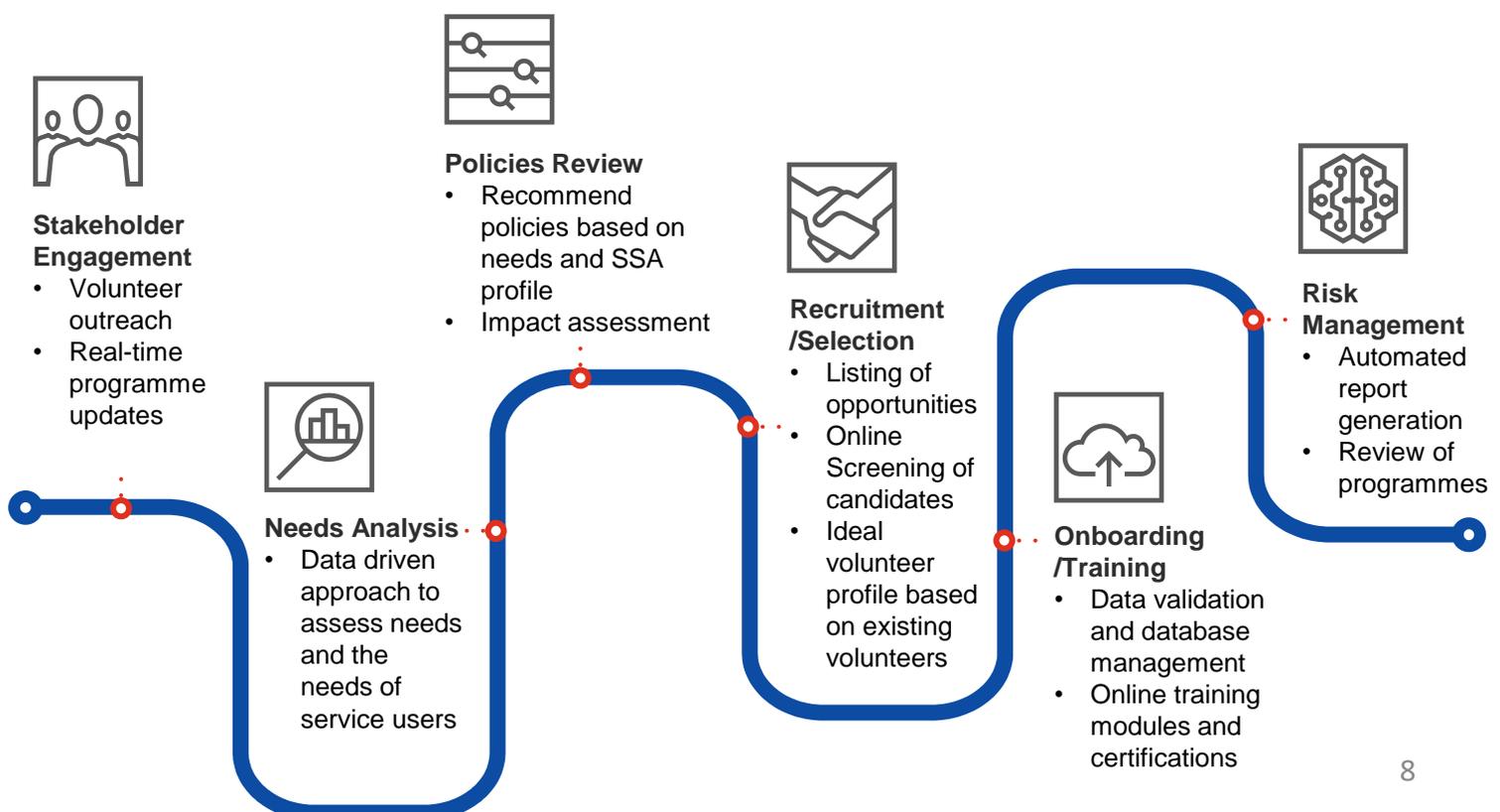
Enhancing Volunteer Management

What motivates volunteers to volunteer?

Understanding the motivations of volunteers is important as they may have varying reasons on how they like to contribute to an organisation and manage their expectations. Based on the responses* of the survey conducted using the Volunteer Engagement Tool, the majority of volunteers are motivated by the nature of the work. Volunteer engagement and touch points with SSAs are key to maintaining volunteer satisfaction and retaining volunteers. The Volunteer Management Framework is the foundation to deliver that experience and the effective use of VMS (after proper selection and implementation) will provide a better all round volunteer experience.

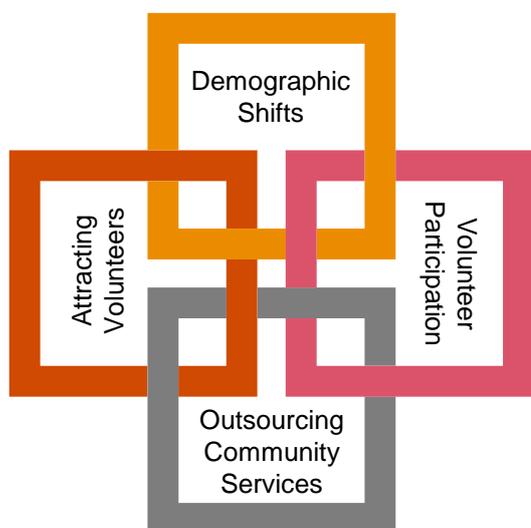


Incorporating NCSS Volunteer Management Framework



Challenges and Improvement

Challenges in Volunteer Management and Participation



Source: Doing Good in Singapore Part 2 – Chapter 3:
Developing Volunteers for the Social Service Sector



Volunteer Participation

SSAs may face difficulties in attracting volunteers if their programmes do not appeal to the volunteers. Technology empowers SSAs with more time for volunteer and service user engagement, creating a better experience for them.



Demographic Shifts

A declining volunteers rate will affect SSAs who rely heavily on volunteers. This can be mitigated by expanding volunteer opportunities to all groups, who can form a substantial pool of volunteer resources.



Attracting Volunteers

In a changing volunteer landscape, SSAs may need to design more innovative programmes that appeal to a wider base of volunteers, allowing them to proactively participate in volunteering and catering to the needs of service users.



Outsourcing Community Services

While the outsourcing of some administrative work increases productivity, SSAs should avoid outsourcing and replacing community services as it may reduce the spirit of volunteerism in the community. Volunteer activities should continue to be people-centred, instead of task- and activity-focused.

Enhancing Volunteer Management and Participation



Promote Corporate Volunteerism

Involving skilled volunteers with relevant experiences will enhance the volunteers' personal growth and development. Professionals are equipped to understand and support needs of service users.



IHL Volunteer Management Centre

With effective volunteer management practices, volunteer training and development programmes, students from Institutes of Higher Learning (IHL) can become a pool of substantial resource.

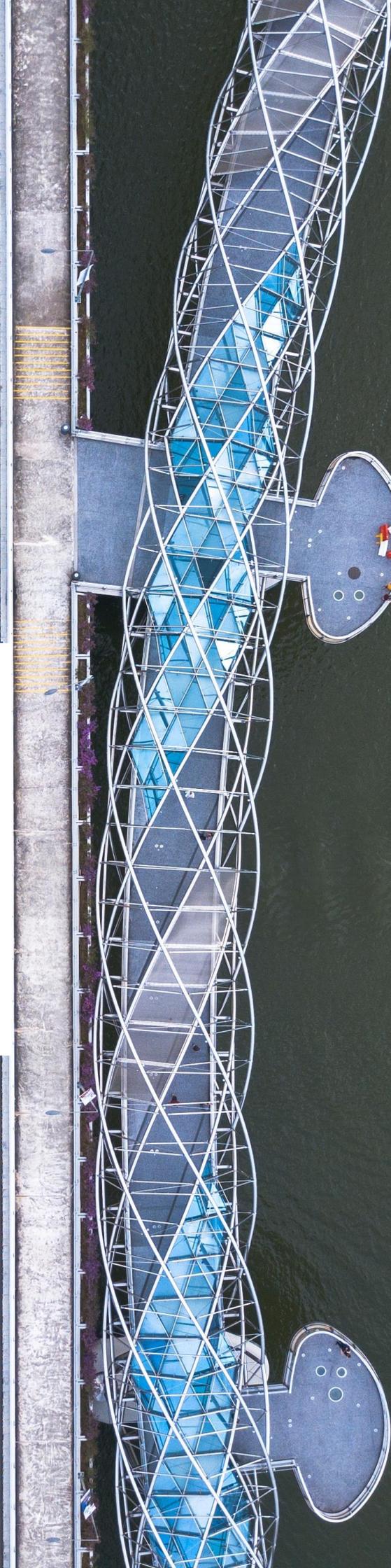
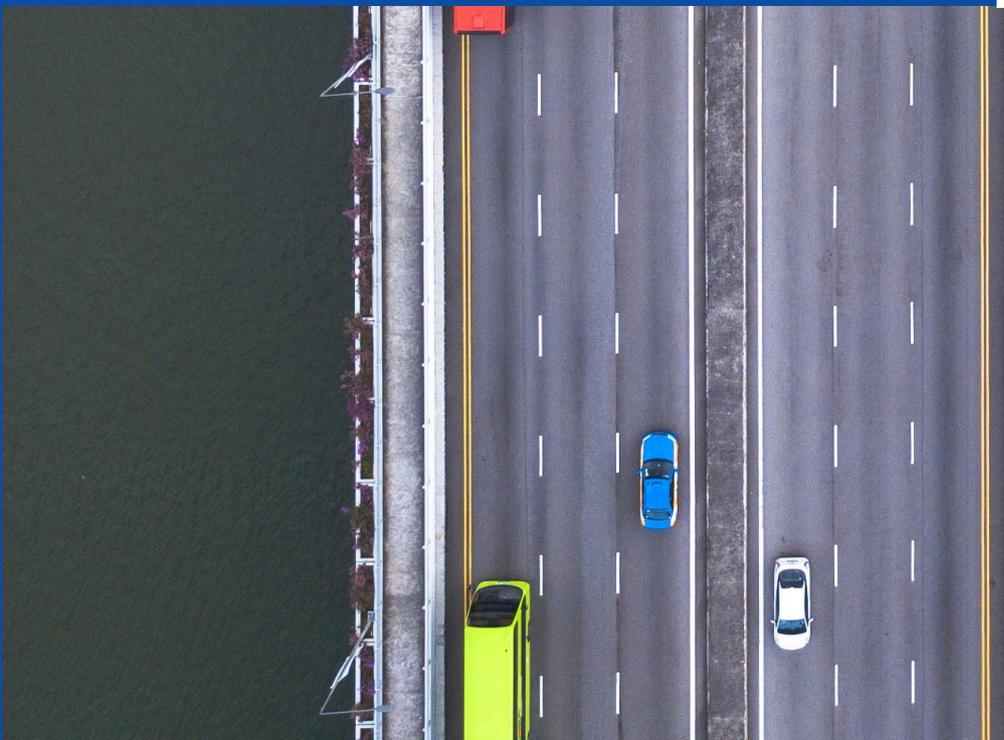
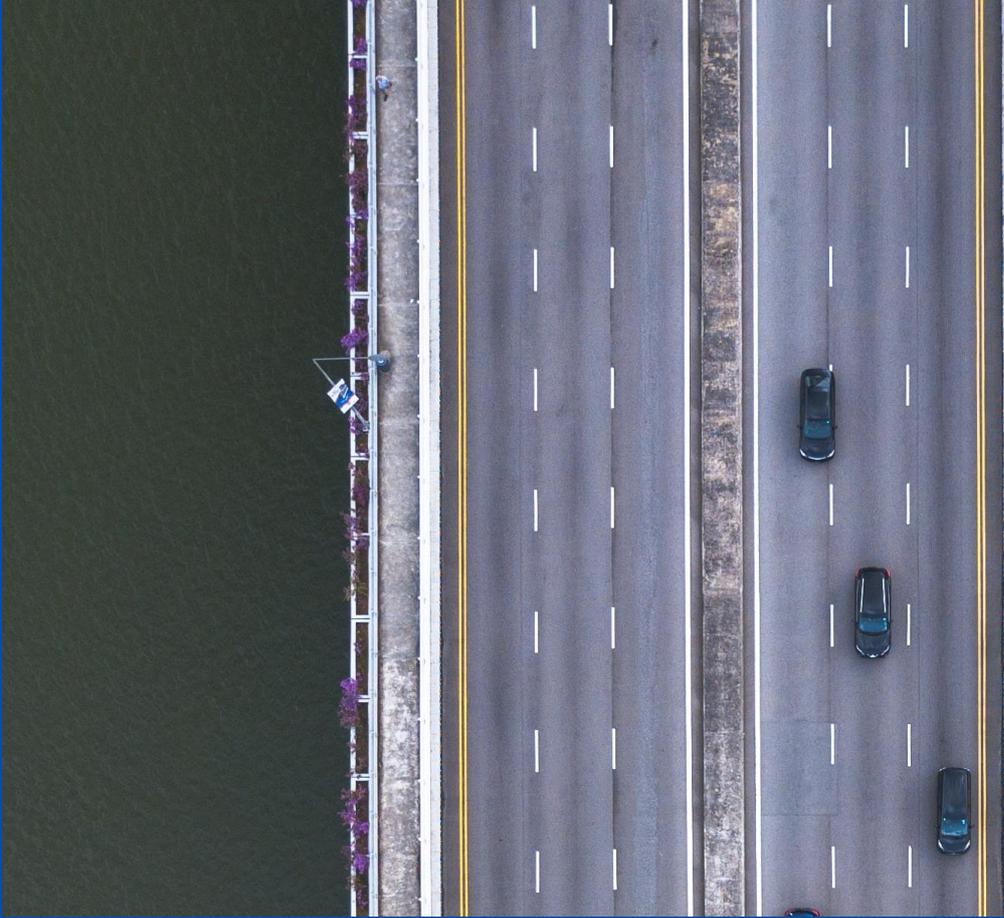


Embrace New Technologies and Modes of Communication

Technologies like Cloud Hosting and Analytics are becoming commonplace and more affordable. Social media is also an increasingly important tool for outreach and increasing awareness.

3

What is a VMS & Why Implement VMS



Digital Evolution and the Smart Nation

Embracing Digital Change

Today, digital technologies are becoming an integral part of society. They have brought about greater ease in navigation, new ways of learning and fostering deeper connections with family, friends and our community.

As Singapore moves towards a Smart Nation and becomes increasingly connected through technology, organisations must also seize the opportunity to innovate and upgrade themselves to better serve the community.

The SSAs can take advantage of this climate and use technology to improve productivity and do more for the service users.

The Smart Nation*

A Smart Nation is a Singapore where people will be more empowered to live meaningful and fulfilled lives, enabled seamlessly by technology, offering exciting opportunities for all.

Technology disruption is a reality today and is happening around us. In order to proceed with, and not be left behind on our Smart Nation Journey, we should confront, adopt and harness technology to our advantage.

Developments in digital technology present opportunities for SSAs to enhance strengths, overcome challenges and physical limits, and deploy the use of resources to better deliver services to service users.



**Source: Smart Nation Singapore*

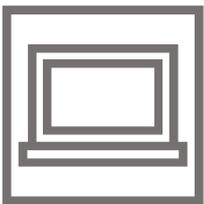
Embark on the Digital Journey

Assess the Level of Digital Sophistication of your SSA

The Level of Digital Sophistication of any organisation can be categorised into 3 stages: No or Low Digital, Some Adoption and Digital Innovation. Identifying your current level will allow you to discover opportunities for productivity improvement and move towards the “Digital Innovation” level.

The key to stay ahead of the digital curve is the commitment to change which includes the alignment and commitment of the majority of your stakeholders towards the change. Implementing a VMS is a major step forward in your digital journey and will greatly enhance your productivity.

1 No or Low Digital



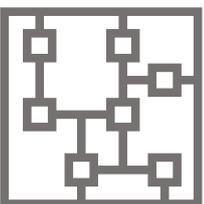
- Minimal to no digital presence and connect directly with service users within a specific geography or community
- Records and processes are mostly manual
- The first ‘digitalisation’ is usually an online presence (website, social media)

2 Some Adoption



- Branding and online presence
- Spreadsheet based internal operations and some investment into IT and ‘back office’ systems
- Handle financial, HR, donor and service user data (Cybersecurity is an issue)
- Use of some technology for efficiency (e.g. QR code for registration, social media)

3 Digital Innovation



- Use data and technology to innovate new programmes and services to serve service users and increase productivity
- Leverage digital marketing and crowdfunding platforms
- Have a digital strategy that encompasses not only internal operations but addresses external stakeholders’ changing needs

Volunteer Management System

What is a Volunteer Management System?

Volunteer Management System (VMS) is a digital volunteer management tool designed to aid the organisation in the management of volunteers to improve productivity and potentially enhance the volunteer experience.

With the support of a VMS supplier, a VMS is simple to implement. The VMS can be set up with various features to reduce volunteer managers' workload, increase their efficiency and give them useful insights into their agency's programmes and volunteers.

Here are some recommendation for basic features to be included in a VMS. These digital features have been implemented by most organisations and have proven to greatly improve their productivity and efficiency in volunteer management.

Basic Features



Home/Landing page (Indices dashboard, upcoming programme viewer)

- Overview of all programmes & volunteer statistics



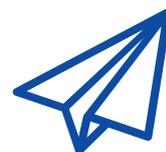
Volunteer Database (Registration forms, database & search, volunteer profiles, data export)

- Overview of all volunteer information



Email interface (Compose emails, email sent history, group broadcasts)

- Easy communication with various volunteer groups



Email RSVP (Send activity invites, capture invitees' response)

- Facilitate registration for events or collect volunteer feedback on the programme



Messaging interface (Compose messages, message sent history, group broadcasts)

- Real-time communication in chat groups (e.g. WhatsApp groups)



File sharing (sharing documents with staff, sharing documents with volunteers)

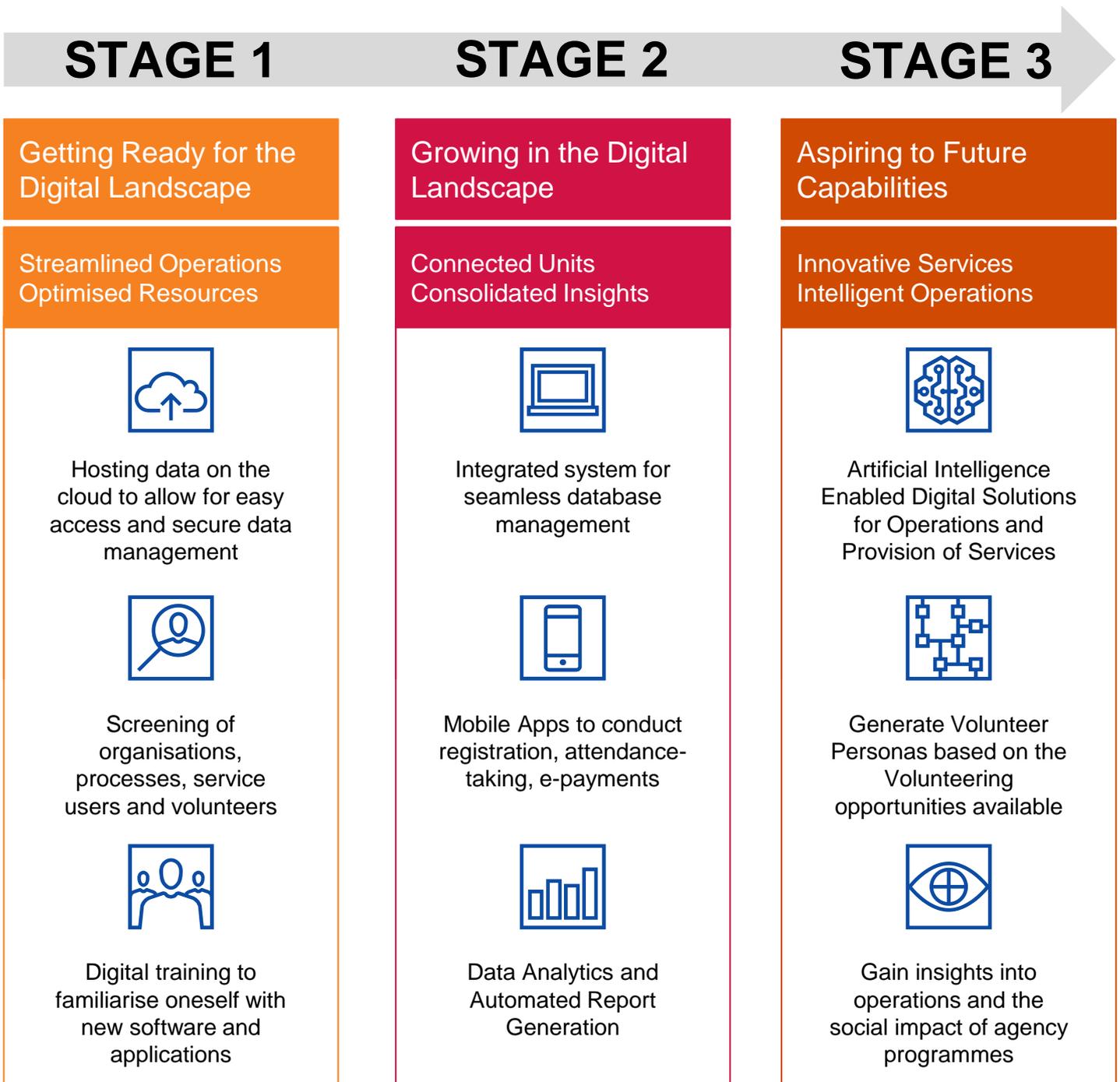
- Sharing instructions, information, forms, etc.

**For a detailed list of VMS features available in the market, please refer to "Features of VMS" in the Additional Information*

Stages of Advancement of VMS

VMS incorporate many Innovative Solutions

Digitalisation offers endless possibilities to transform businesses, groom talent, and enrich the way we live. Organisations must harness these technologies and innovate, equipping their staff with new skills and capturing opportunities from the digital space. We identified 3 stages of advancement – Stage 1 sets the foundation for your SSA, Stage 2 is what you should explore now, and Stage 3 is what you should consider in the future.



Why SSAs should adopt VMS

Digital Technologies are positive investments for SSAs



Rising demand for services

Demographic trends are driving demand while fundraising potential is on the decline. A VMS can help to create more capacity to manage both donors and volunteers.



Drive to remain sustainable

Doing more with less. A VMS can save staff and volunteer's time spent in processing documents or answering basic questions.



Growing need for collaboration

Millennials prefer to support causes rather than specific organisations. Matching potential volunteers with the right causes can improve the volunteer experience.



Prove they are trustworthy

Donors and stakeholders are demanding more transparency to see that resources are well used. Automated programme reports can be generated to show the results.



Pressure to show impact

Analytics can be a powerful tool for tracking impact on service users and quantifying the value created. Volunteer managers will be able to measure the impact of their initiatives with a VMS.



Essential to get the word out

Technology enables real-time communication and increases outreach, facilitating the need to communicate (and receive feedback) with donors, volunteers, service users, and other stakeholders..

Most common concerns about digitalisation in the Social Service sector

“It is challenging to learn new technology”

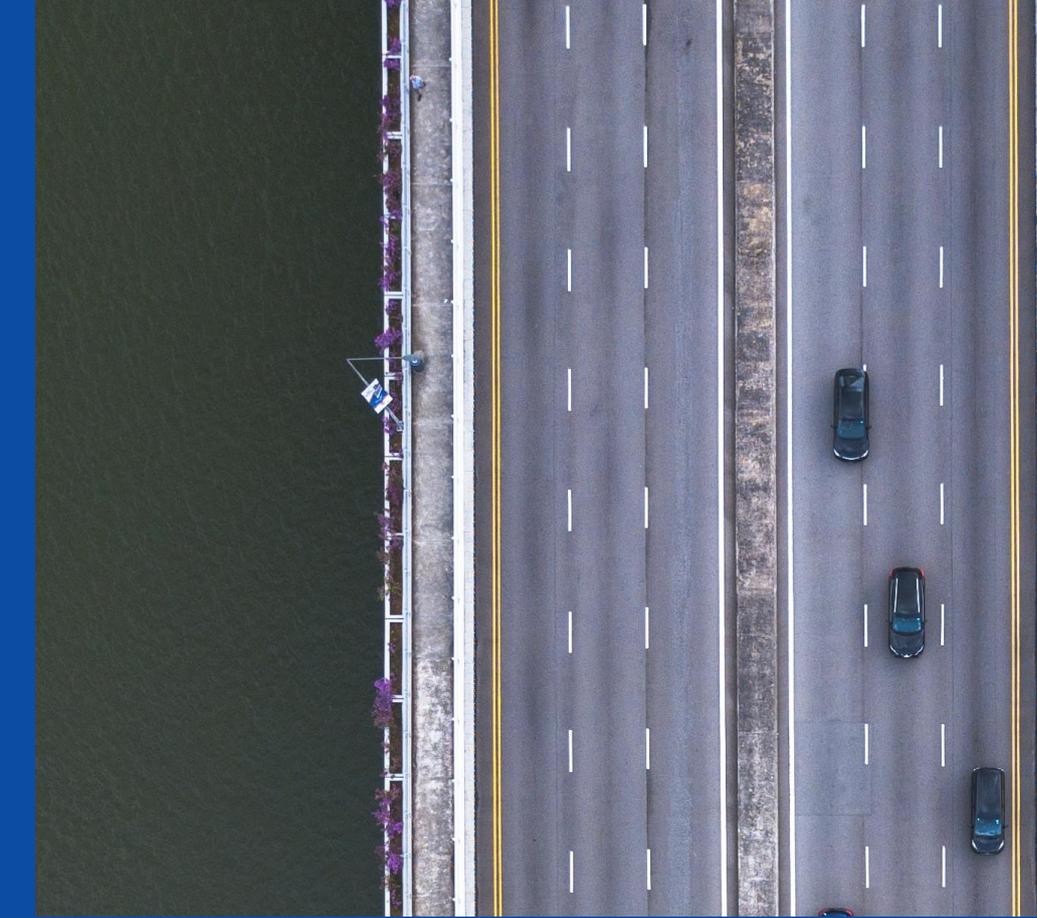
Technology today is built around users' demands and are designed to be user-friendly and self-explanatory. The focus should not be on the technology, but what it allows the user to do. A good implementation plan must be based on change management.

“How do we manage our data”

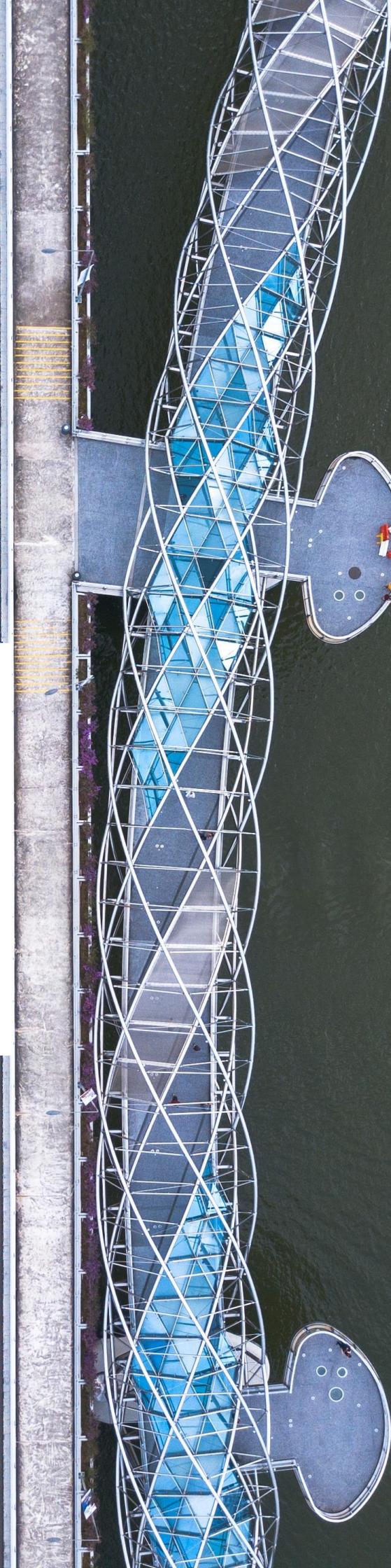
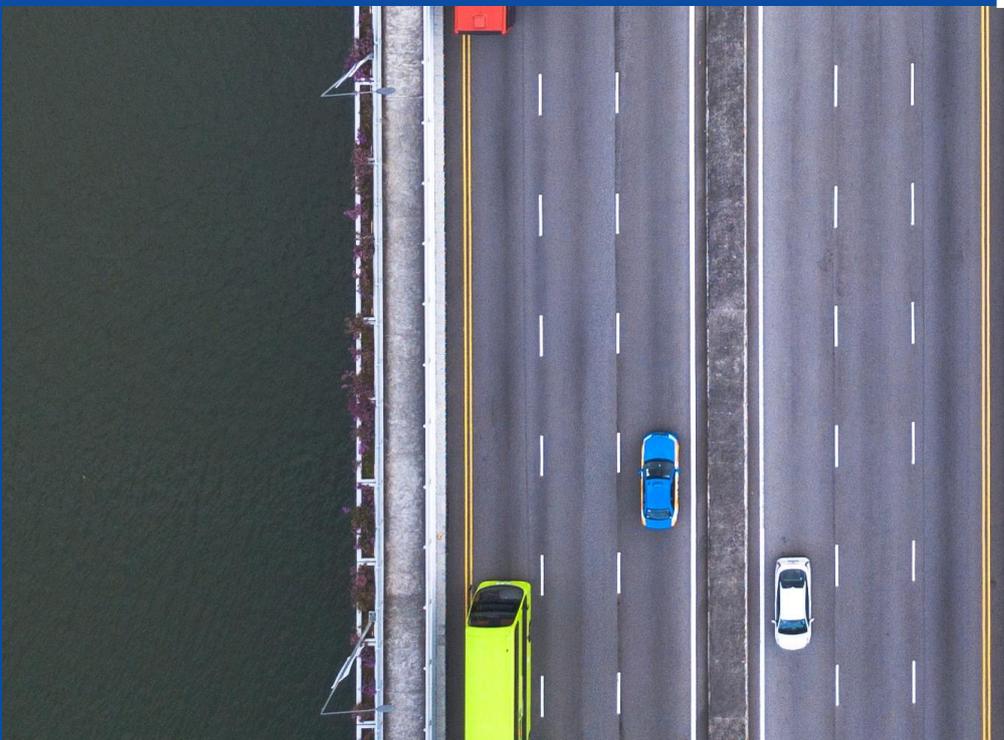
Start by asking yourself if a shift to digital technology would be a step up. Digital solutions have a strong interest in keeping trespassers and viruses out with requirements of redundancy and back-up services. Cloud computing is a more secure and flexible way of storing data.

“We may not have the resources”

New technology requires strong management and clear purposes and outcomes. Once in place, you can more easily measure and quantify the quality and gains. Digital solutions have been proven to enable SSAs to better secure and manage resources.



4 Search and Select your VMS



The VMS Roadmap

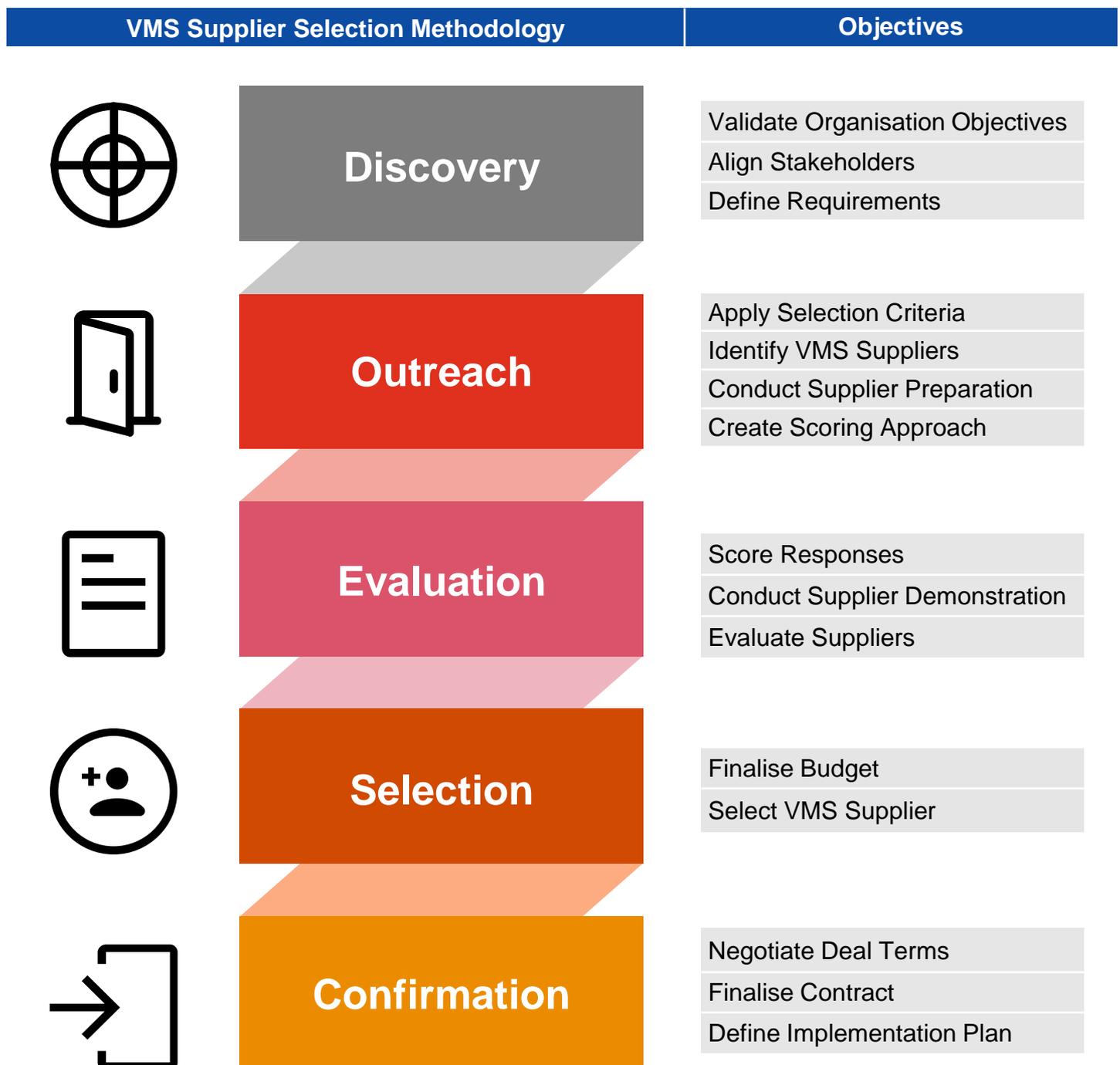


*For additional information (e.g. funding available), please refer to Section 7 (page 27)

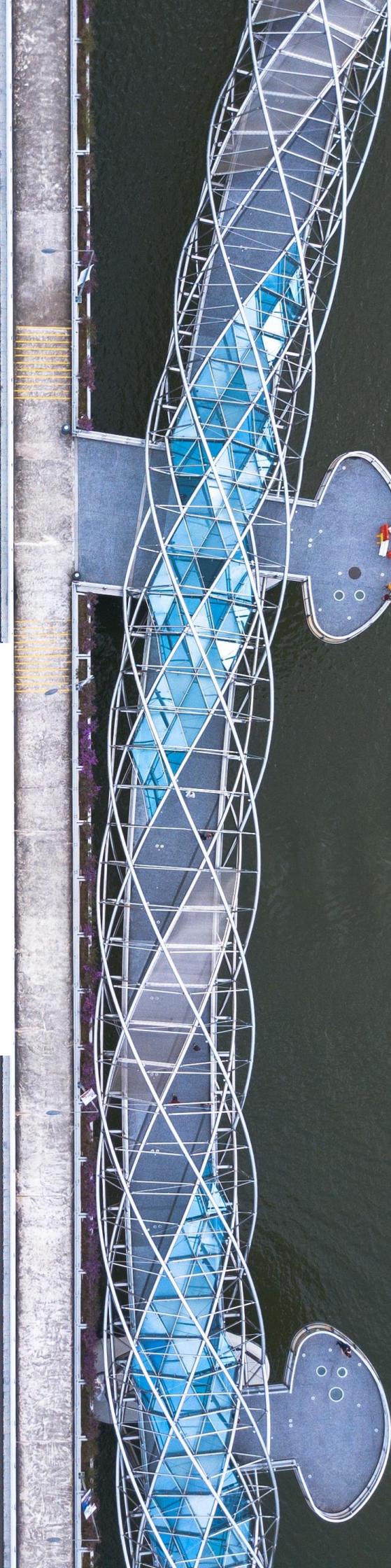
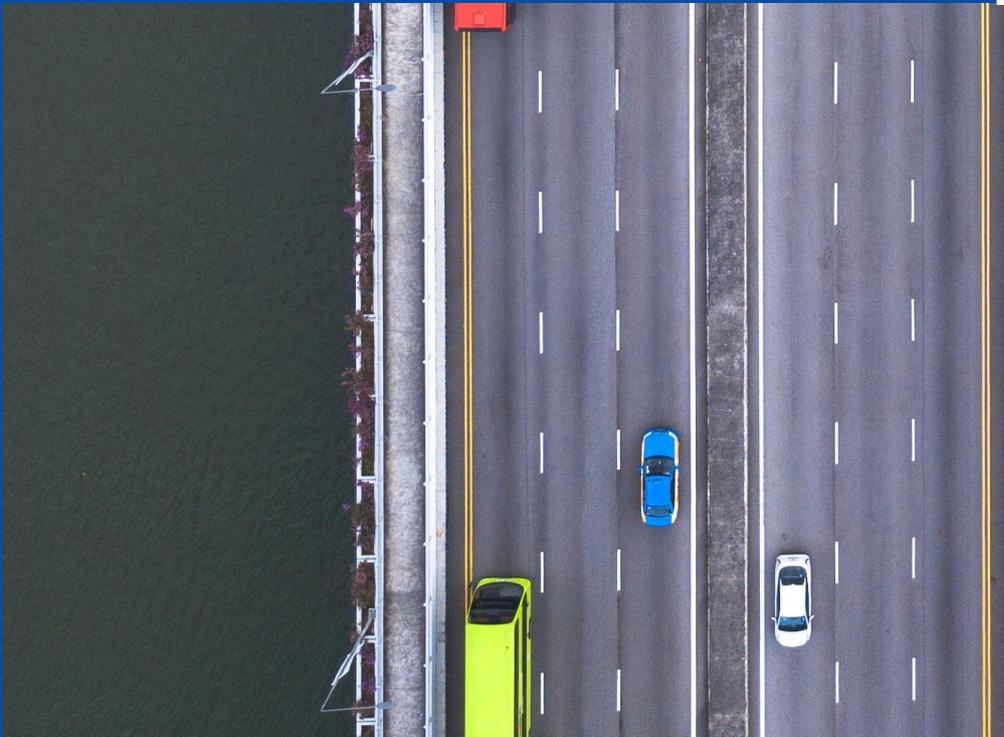
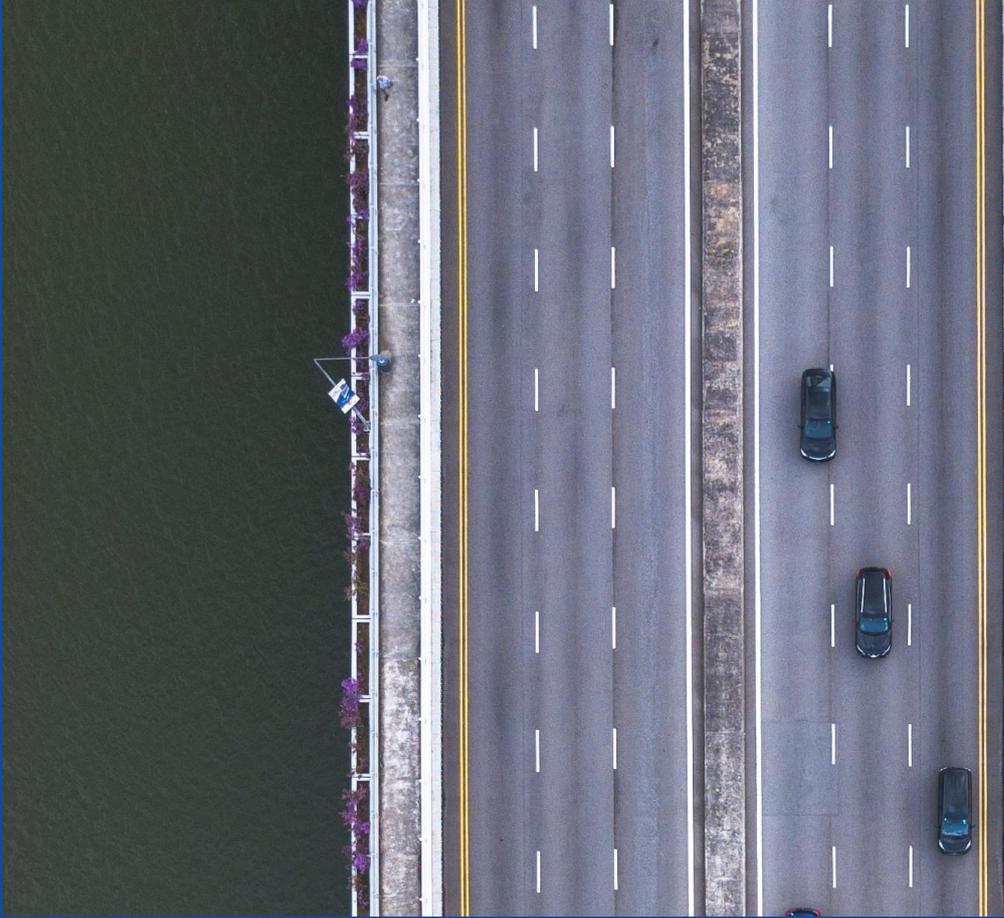
Search and Select your VMS

How To Go About Selecting your VMS

Searching for your VMS is a crucial step that requires the commitment of your organisation. It is important that you select the right VMS supplier as your partner to implement a VMS that is beneficial for your organisation. The steps to search and select for a VMS can be summarised in the following ways.



5 Implement your VMS

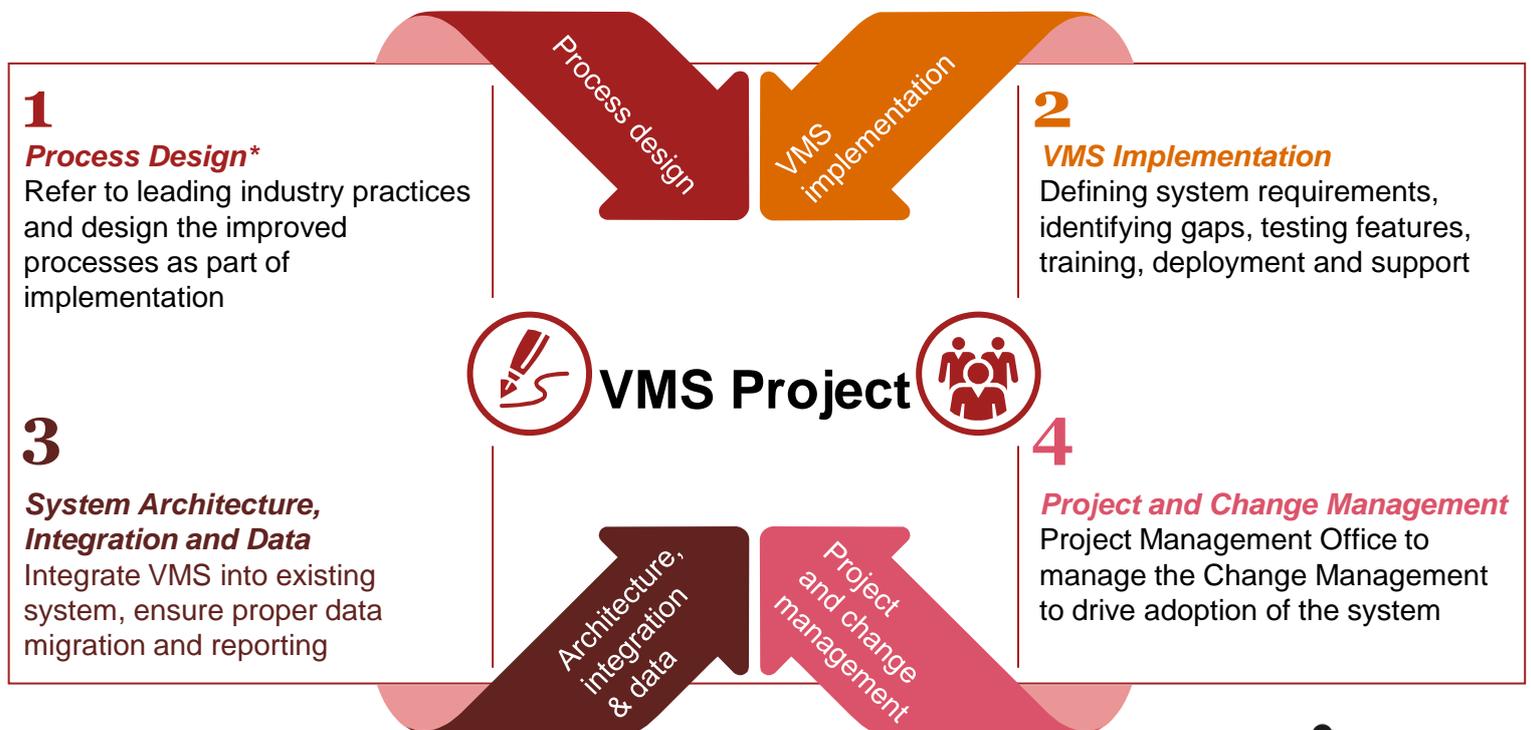


Overview of How to Implement your VMS

Key Components of a Successful VMS Implementation

A successful VMS implementation will require clear communication from all stakeholders involved. Prior to implementing a VMS, you should define your Volunteer Management Process and understand which processes can be supported by the VMS.

The appointed VMS supplier will be able to support you with the technical aspects of the implementation, but it is crucial that you supply them with the resources and information they would need. Appointing a Project Manager to oversee your change management plan will also help the implementation go more smoothly, and reduce the risk of delays or exceeding the budget.



*Refer to Process Design in Additional Information (page 34)



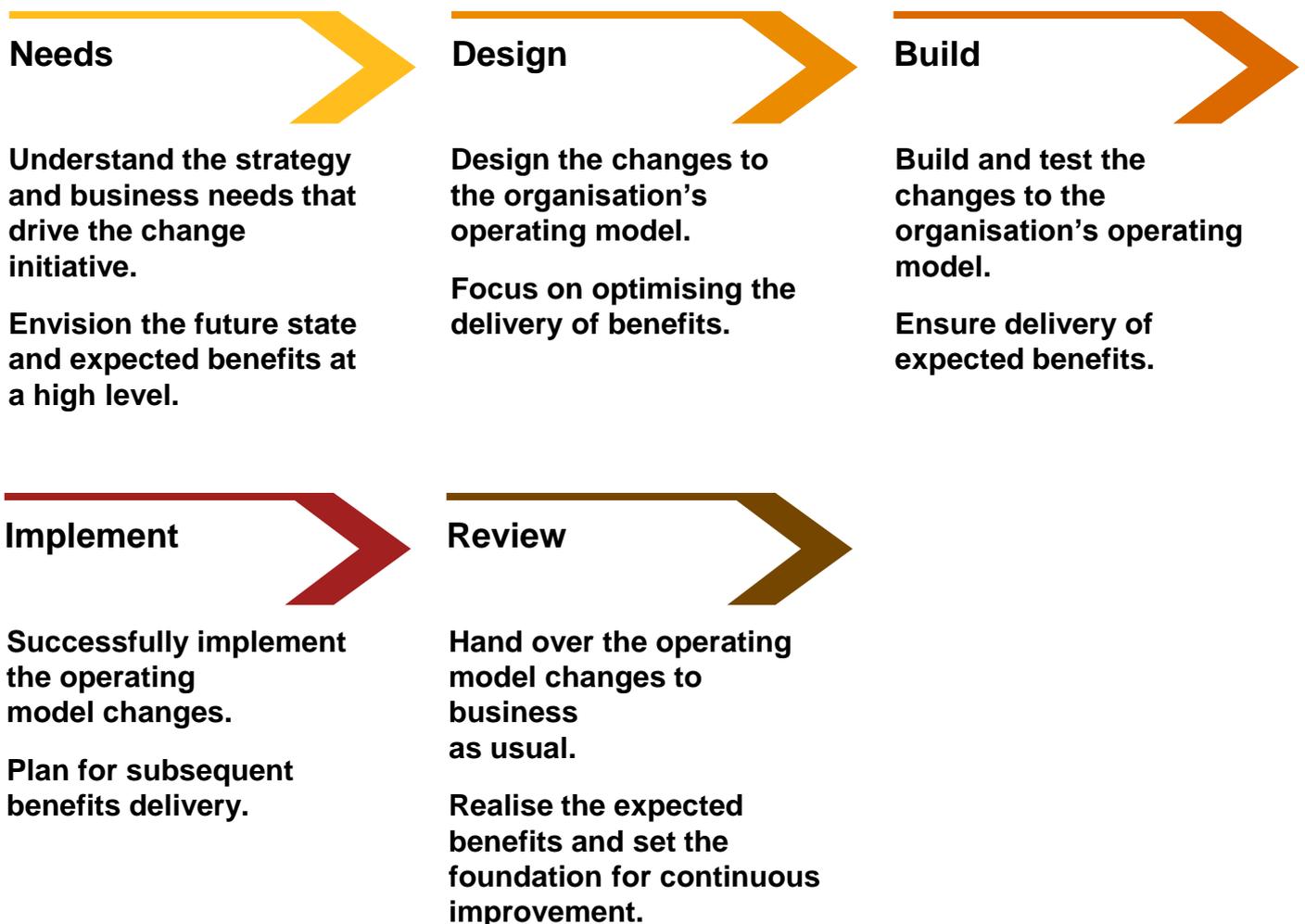
Phases of VMS Implementation

Communicate with your VMS Supplier

As your organisation grows, it is important that the VMS is flexible enough to accommodate your growing requirements. The selected VMS should also be configurable and scalable to your needs.

Before the implementation, discuss with your VMS supplier on your required (must-haves) and optional (good-to-have) features. This will allow them to prioritise the roll-out of the system and ensure that your most critical features are working before your transition to the new VMS.

Agree on a feasible timeline and budget for the implementation. Constant and consistent communication is crucial to ensure that any issues are immediately raised and handled by the staff-in-charge.



The Importance of Change Management

What is Change Management?

Change Management is a technique to manage the people involved in the implementation and help you to achieve your desired organisation outcomes. It is the systematic management of staff engagement and adoption when the organisation changes and how work will be done.

Refer to the Change Management timeline and plan (page 35-36) for more information.

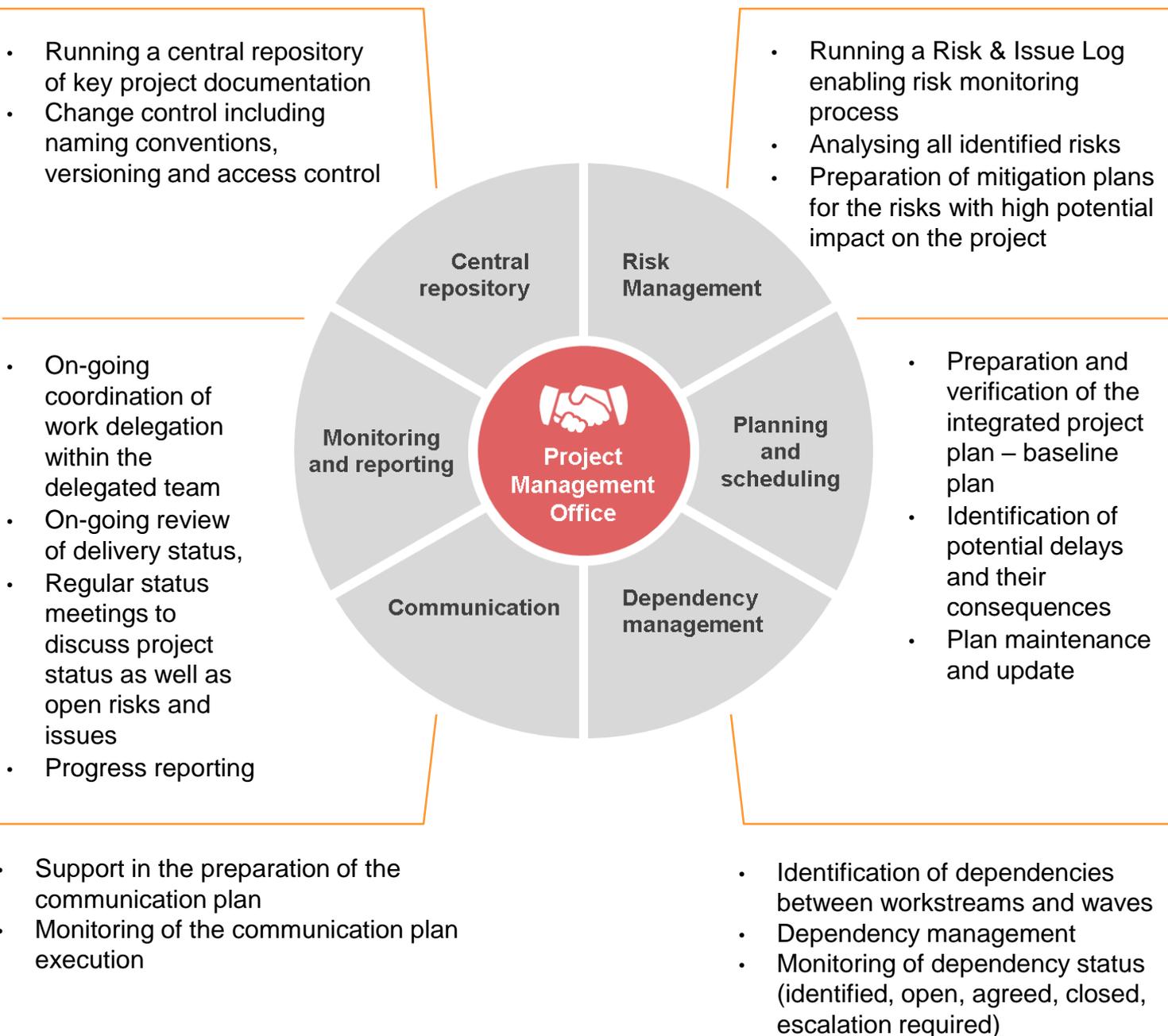


The Need for Project Manager(s)

Appoint or assign someone to oversee the Project

For a successful project implementation, appoint a dedicated Project Manager to ensure collaboration and manage deadlines. Ideally, there should be a single decision maker in charge of the project, as it reduces the potential for miscommunication and unnecessary rework.

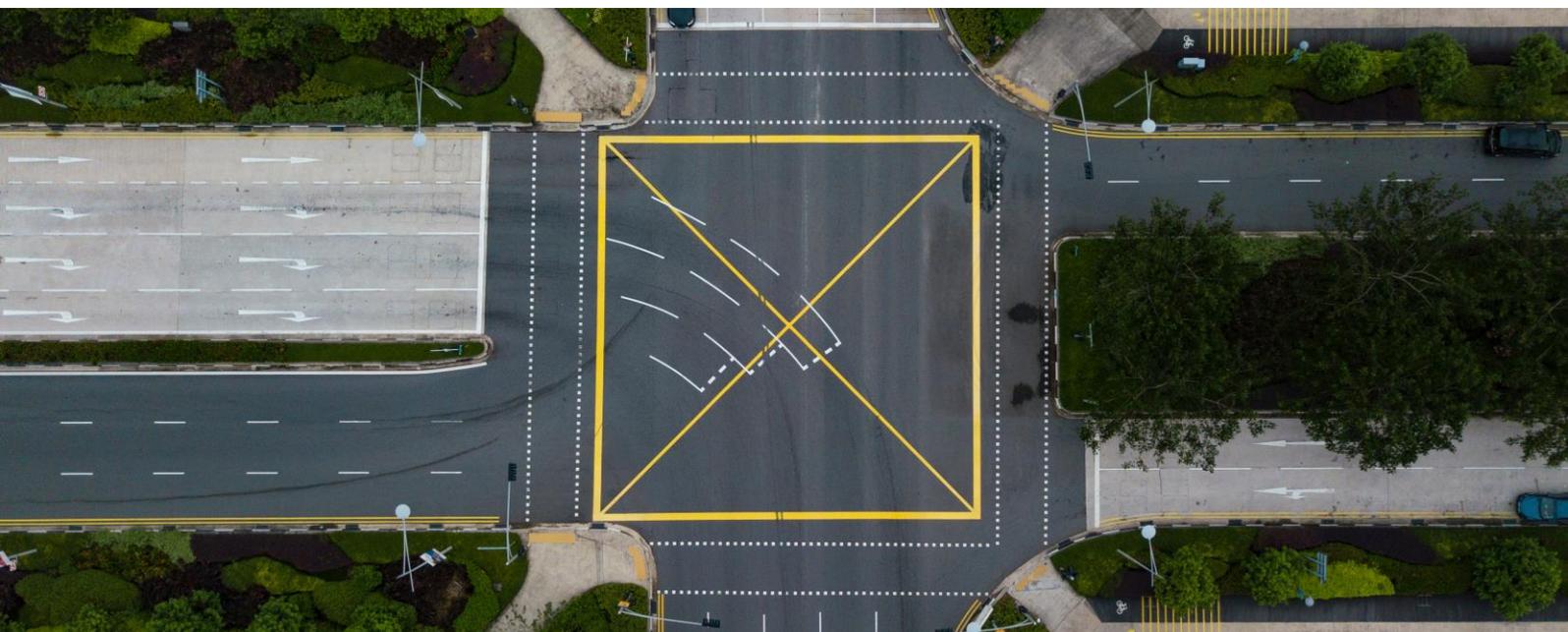
Depending on the scale of the VMS implementation, a project team, led by a project lead, may be required. The project lead should be in direct communication with the project team and be able to provide them with live updates on the progress of the implementation.

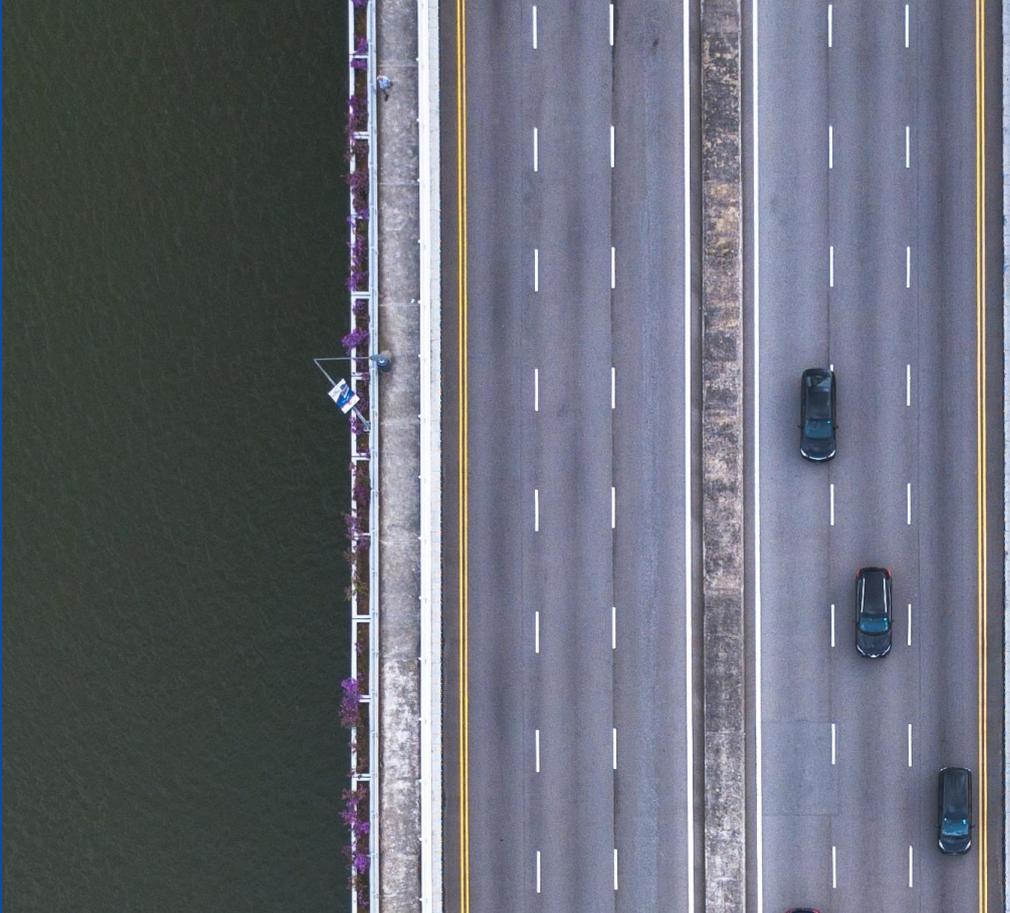


How to succeed in your VMS Implementation

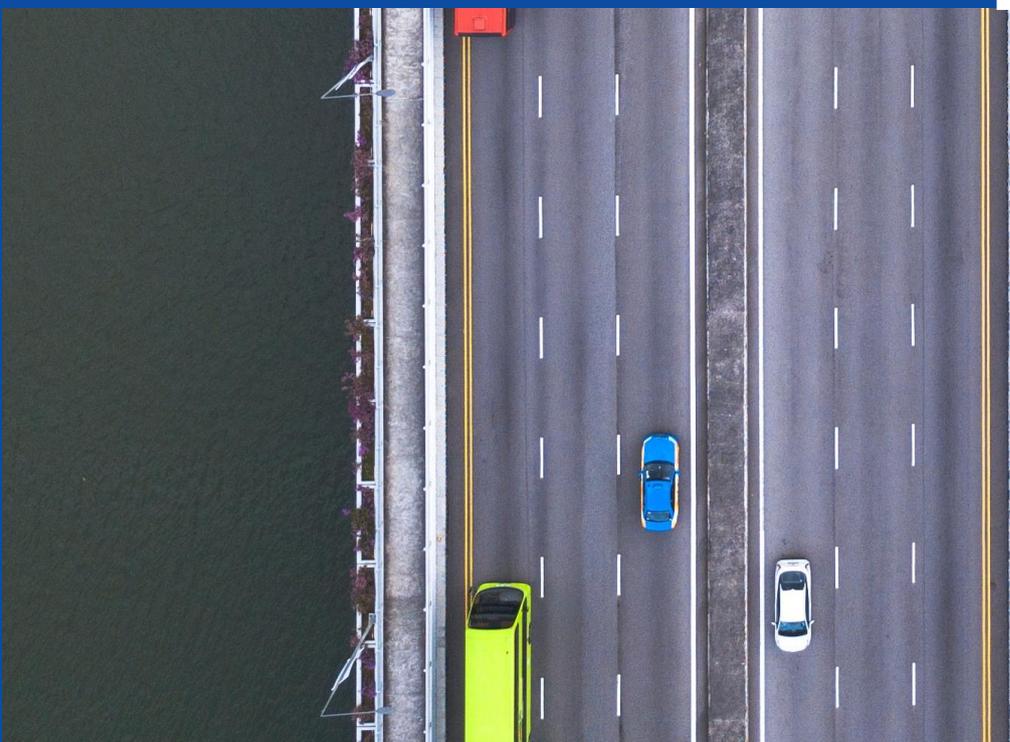
Common success factors for VMS implementation

- Senior Management support and governance
- Running the engagement as a people-led, technology-enabled approach tied to outcomes (instead of as an IT initiative)
- Overcoming resistance to change and low end user adoption / involvement
- Equipping core team with sufficient resources and skills
- Clear focus on project management (scope, schedule, budget, resources, quality)
- Defining change management and end-user adoption at the initial stages of the project
- Strong end-to-end testing and implementation methodology (design, build, test, deploy, support)
- Recognising data as a critical factor in the success of the project
- Collaborating with a VMS supplier (partner) to provide their expertise (industry, process, technology, PMO, change) rather than simply serve as an “order taker”
- Sufficient local / regional resources from partner coupled with “onsite” presence





6 Get Started Today



Get Started Today

Self-Assessment Template

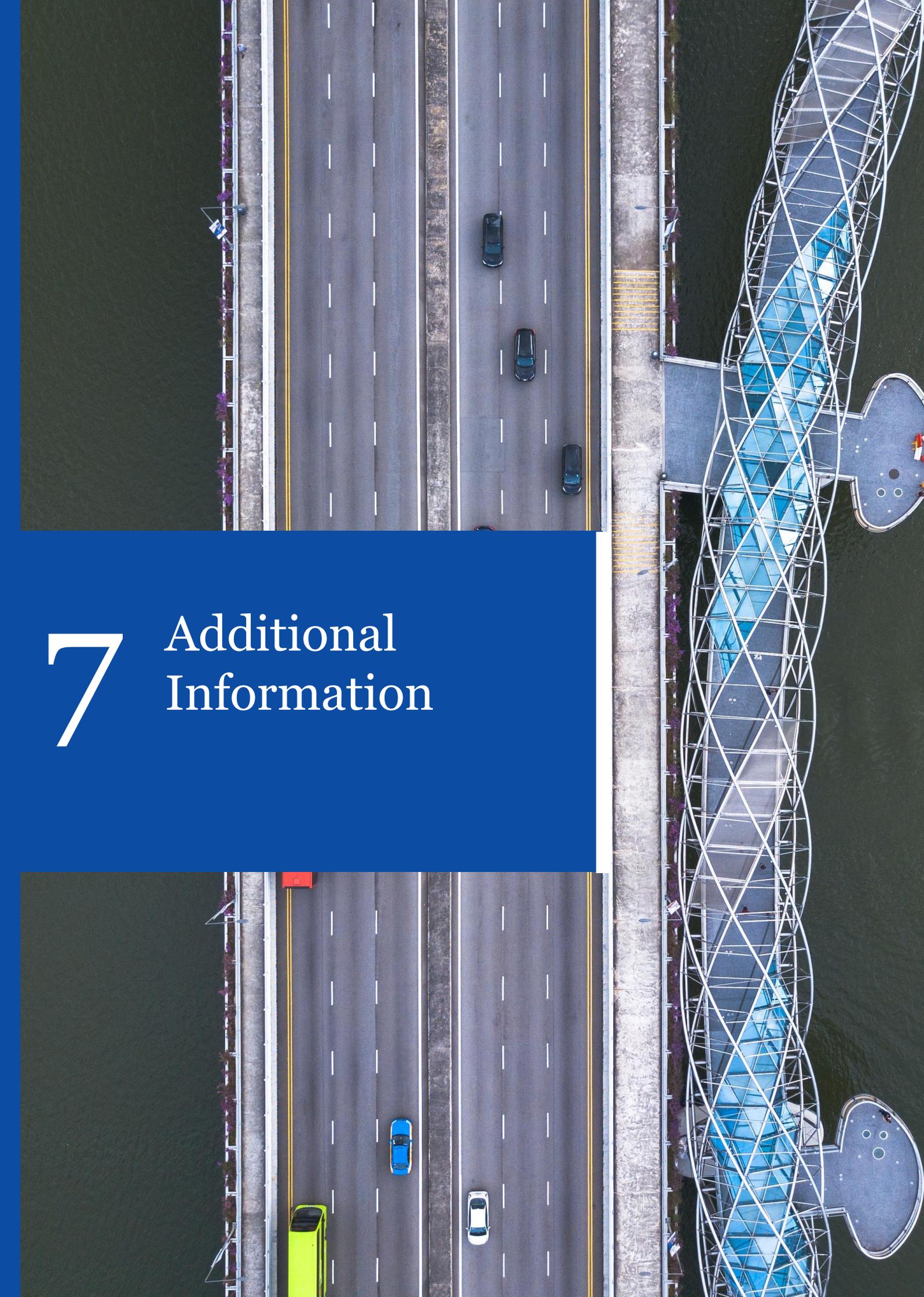
This Self-Assessment Template is designed to be used in conjunction with the Roadmap. The Self-Assessment Template will give you a better understanding of the current state of your SSA and your Volunteer Management Process.

To facilitate a smoother journey in aligning with your stakeholders and the search for a VMS, do complete the Self-Assessment Template. It should take about 15 minutes to complete.



Scan the above QR code or head over to <https://go.gov.sg/ncssvro-vmssir-sat/> to download the Self-Assessment Template.





7 Additional Information

Additional Information Contents

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Upcoming Trends that will impact SSAs



Employee friendly work environment

Create a friendly working environment to allow for informal engagement and interaction, proven effective for organisational outcomes



Use of Technology

The use of real-time analytics, the application of gamified systems and big data will rise exponentially



Engaging the millennials

Managers and organisation leaders will design stakeholder engagement programmes focusing on the younger generation



Employee empowerment

Leaders should continue entrusting their employees with decision making capabilities



More transparent conflict resolution process

Organisations will become more transparent in their conflict management and resolution process



Use of social media in stakeholder engagement

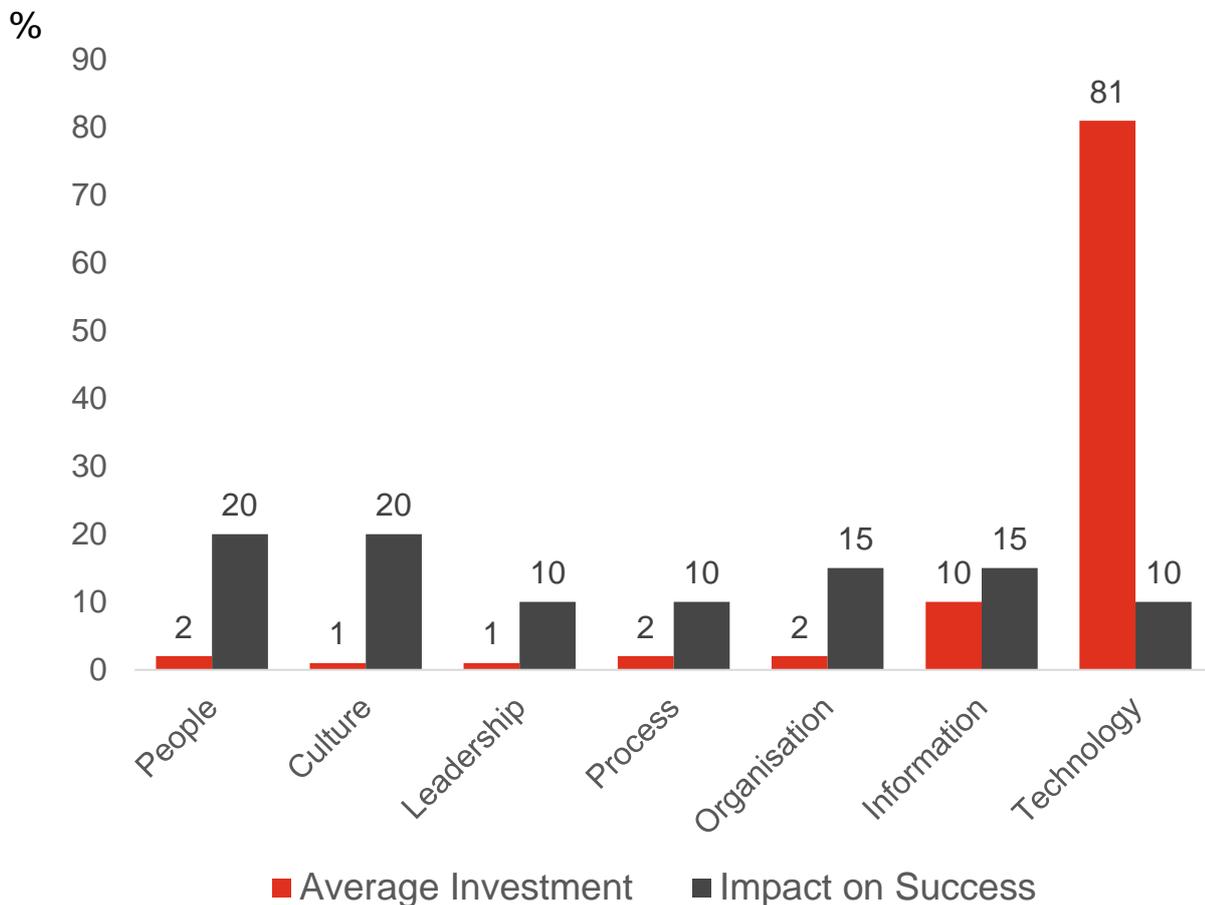
The use of social media platforms in stakeholder engagement, especially in employee appreciation, will become the norm



Work-life balance

The concept of balancing work pressure and personal life is becoming more important. There is no doubt that this will only become increasingly popular in the future

Success Factors for Projects



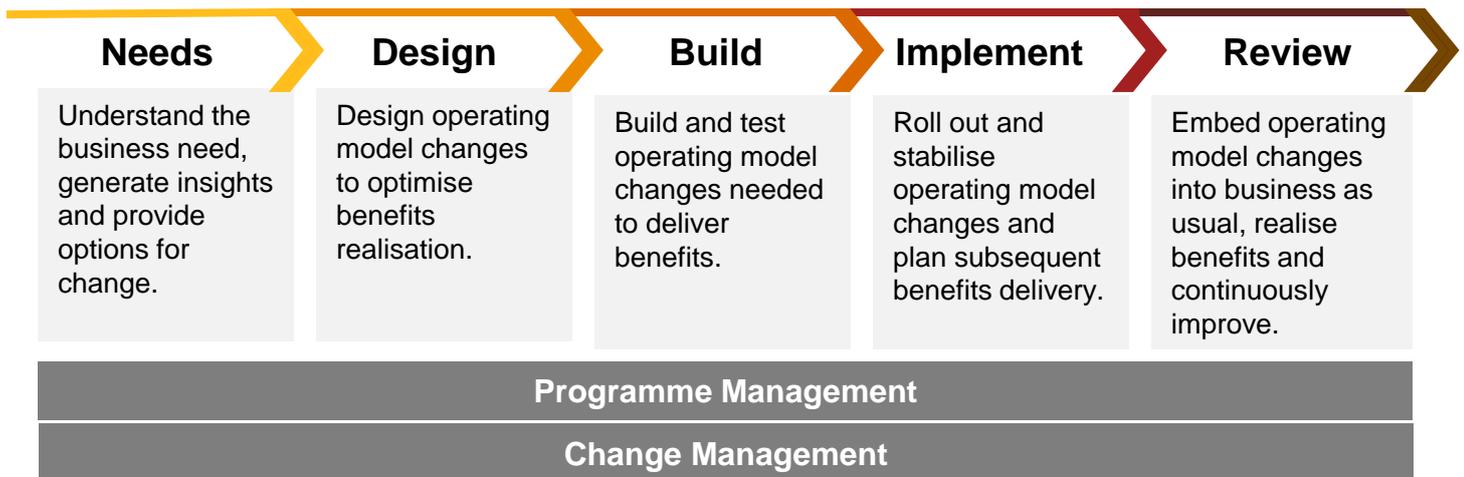
Organisations tend to emphasise Technology in projects

- Despite contributing more than 50% to a project's success, People, Culture and Leadership only receive 4% of a project's overall investment
- 75% of projects fail because the "people aspect" was not considered
- Higher investment in these elements leads to quicker realisation of the benefits of the change
- Focusing on your people and culture, leadership and process alignment are key to the overall success of your journey as it requires a change in mindset and behaviours, rather than just focusing on a change in system
- To ensure a successful project for your SSA, you should develop a robust Change Management Approach to support your Volunteer Management Process transition

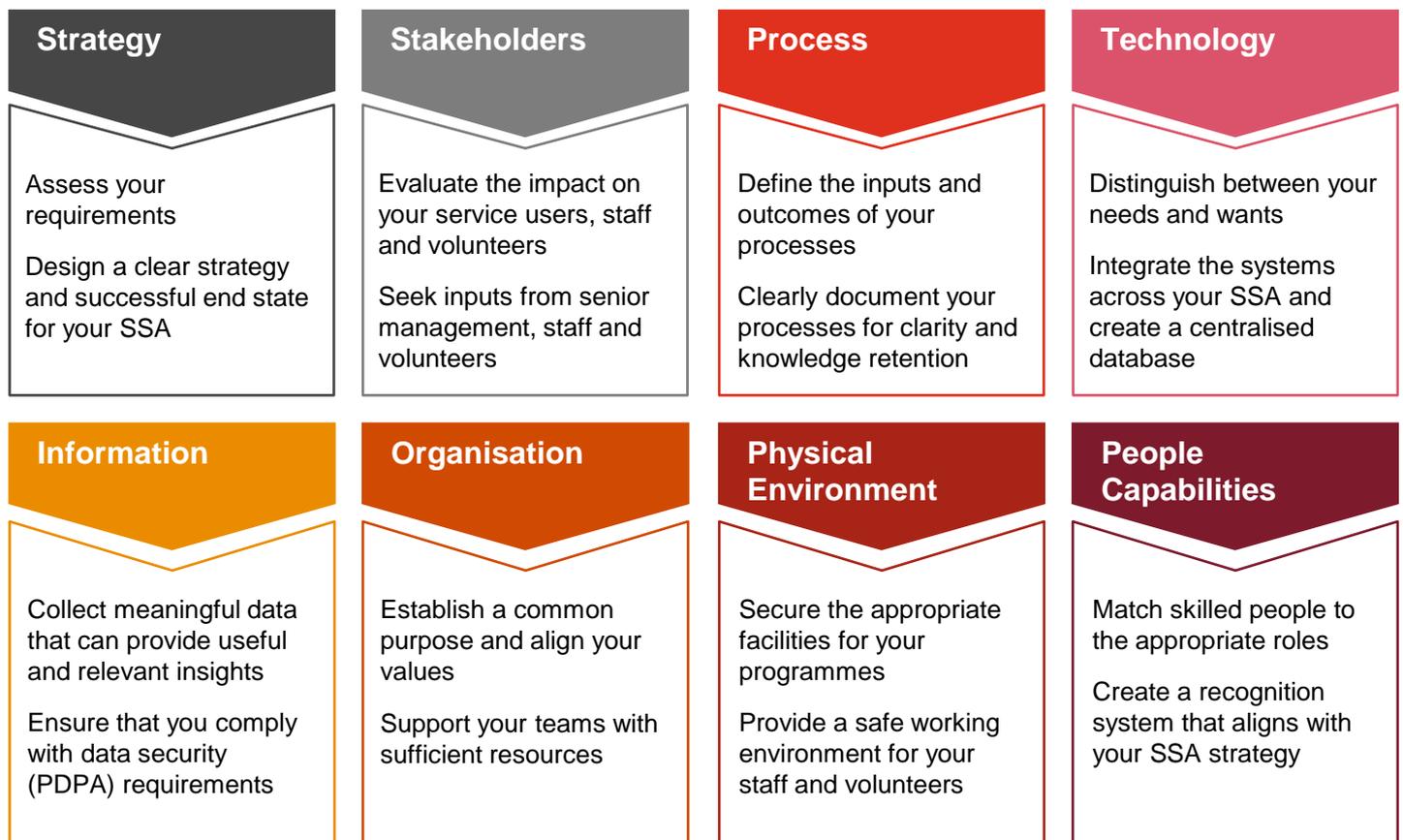
The Transform Framework

The Transform Framework provides a guide for your VMS implementation

Before the implementation of a VMS, leverage the Transform Framework to address all aspects of your SSA. This will allow the SSA to go through a smoother and clearer transformation.



Steps for each aspect of your SSA Transformation



Importance of Digital Strategy and Project Management

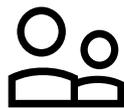
The essential outcomes of a Digital Strategy

A digital strategy is comprehensive, flexible, and empowers an organisation to respond to both current and future opportunities and threats. A digital strategy should deliver relevant results for SSAs.



Engage donors and volunteers

Strengthen support and participation



Empower employees

Increase productivity and creativity



Optimise operations

Accelerate non-profits' mission



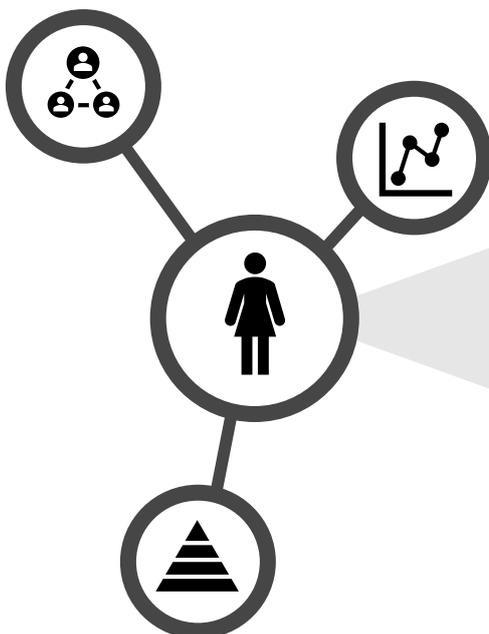
Innovate for impact

Do more good from field to office

Security

Security is the foundation of a digital strategy and critical to driving these outcomes.

Responsibilities of a Project Manager



- Develop a clear project scope
- Responsible for stakeholder engagement
- Ensure project governance and reporting
- Measure realisation of benefits
- Report risks, issues and opportunities
- Control finance/budget
- Track project schedules and plans
- Assure delivery quality
- Manage change control
- Ensure knowledge retention
- Resource and manage teams
- Embed lifecycle assurance and training

Considerations for Budget, Planning and Approval

Pre-selection and Engagement

1. Engage stakeholders to establish a clear understanding of current processes & issues
2. Align on issues, needs and wants of a VMS
3. Clarify the specific requirements of my SSA
4. Understand what my SSA wants to achieve with the implementation of a VMS
5. Commit to changing ways of working where necessary
6. Assess the budget and resources available for the selection and implementation of a VMS
7. Establish communications channels for stakeholders to discuss and raise issues on a regular basis

Tips to engage stakeholders and obtain their buy-in

Suggesting specific solutions and funding ideas increases your chance of success. If we do not see a solution, suggest a sensible process for discovering one, such as by involving people with diverse knowledge, experience and expertise.

Tailoring the pitch to the key decision makers is strongly associated with success. Familiarise yourselves with the audience's goals, values and knowledge and use that to shape your message.

Knowledge of organisational norms, such as what kind of data your leaders usually prefer to use to make decisions, how they prefer to receive information, and whether they tend to support similar issues. It is important to differentiate when to use a formal or an informal approach.

Involving colleagues in pitching your idea will generate organisational buy-in more quickly and on a larger scale. Reaching out to relevant experts can add to your credibility, provided they are trusted by your target audience.



The priority of an issue depends on whether people can see how it fits into the big picture. If we can explain how it supports a goal or benefits the organisation, they will be more willing to devote resources to the initiative.

To secure buy-in from decision makers, it is important to understand and manage their emotions. One should seek to inspire positive emotions by focusing on benefits or showing how action is possible.

Keep a close eye on larger trends and be mindful of deadlines. It is vital to find the right timing to raise your ideas, such as when priorities shift or when decision makers are not preoccupied.

Process Design

Translate Strategy into Process Design, Organisation Design & Technology

1. Strategise & Assess

Project initiation and understanding the strategy:

- Identify project team/design roles and governance, reconfirm planning
- Plan key workshops
- Training for small project team
- Identify burning platform and create vision, ambition, case for change, design principles
- Gain as-is understanding (pain points, organisational structure, culture, system landscape)

Create conceptual design (level 1-2):

- Determine value stream (customer/product offering, business model canvas)
- Develop to-be Process Delivery Model (Level 1 + 2)
- Determine design principles (high level requirements)
- Determine and appoint Business Process Management roles
- Determine L2 designs
- Initiate business case

3. Construct (country specific)

Construct the design

- Support iteration to L4 Design which includes functional specifications, iteration of RACIs, interfaces
- Business impact analysis and localization requirements
- Create local specific designs
- Support translation of process and organisation design to technology *where required* (build and test – unit test, integration test, user demo/UAT for system, test roles and responsibilities)
- Support translation of process to detailed org design *if required*: Create job descriptions, assigning roles to workforce, and size & layer the organisation, determine detailed governance framework
- Create training materials
- Create implementation plan

2. Design (template)

Phase set up:

- Inform key stakeholders
- Assign project resources & arrange logistics
- Initiate tool & vendor selection
- Have basic walkthrough of system to learn to-be options *if required*

Design processes (level 3) *workshop cycle per process**

- Deliver training
- Determine RACIs
- In/outputs
- Determine KPIs, key reports
- Determine business requirements for any system change
- Clarify risks
- Identify key policies and owners
- Determine business process management governance

Design high level organisation design *if required* *workshop cycle per process**

- Design function profiles
- Design to-be organisation structures for each function considering the cross-functional processes
- Determine high level governance framework

4. Implement, Operate & Review

Deliver training sessions:

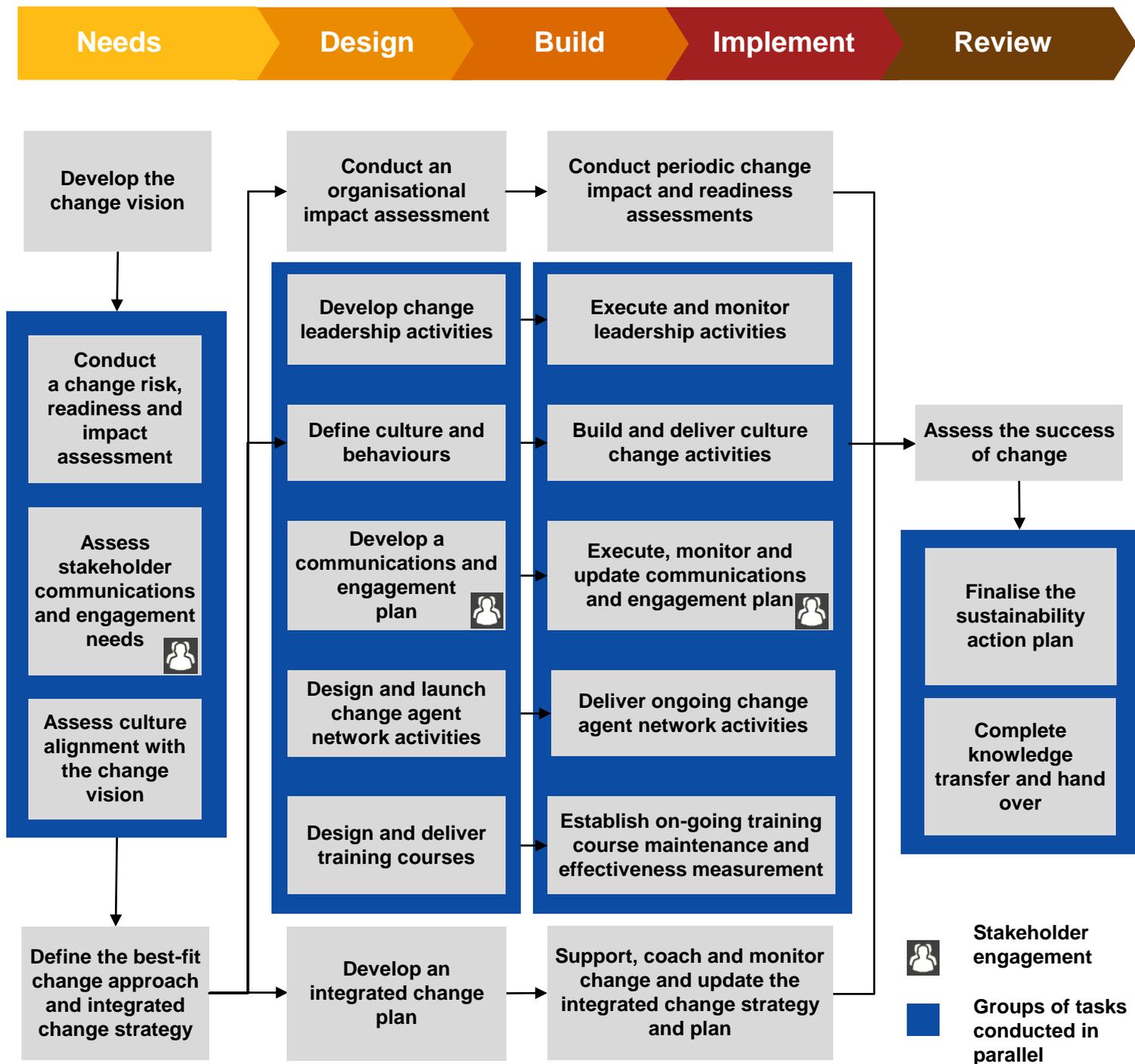
- Train employees in new roles, way of working, and system changes

Go-live and after care:

- Go-live for the constructed design
- Support employees and track benefits

Change Management Key Steps

What are the steps in Change Management?



Change Management Plan: Stage 1

Develop the Change Management Plan

Step 1: Determine the best format to create and maintain your change management plan

Your change management plan can be created and maintained in a number of applications. Generally, plans are managed in Microsoft Project, Excel or PowerPoint. When deciding what application to use, you should consider the size and complexity of the project and the ease of updating and maintaining your plan.

Step 2: Create your change management plan

Upon deciding the application and format, you can create your change management plan which should:

1. List all the change management activities e.g. stakeholder management, communications, change network, learning & development, organisational design, change impact assessment, change readiness, post go-live support
2. Detail when the change management activities are taking place
3. Clearly display all change management deliverables and milestones e.g. change impact assessments (detailed), learning needs analysis, learning & development strategy, change readiness assessments, transition plans
4. Identify who is responsible for each change management activity

Be sure to reference the change management strategy when detailing the change management activities. This ensures your change management activities are aligned with the change management principles and overall best-fit change approach.

Step 3: Integrate your change management plan into the overall project/ work stream plan

Change management is part of the overall project/ work stream. Ensure the change management activities are reflected in the overall project/ work stream plan.

Execute and maintain your plan

Step 1: Execute and track progress against the plan

Once the plan has been created and endorsed, you can begin to execute the change management activities detailed in the plan. Ensure you track your progress against the plan.

Step 2: Continue to update and refine the change management plan throughout the project lifecycle

As you progress through the project life cycle, risks and issues will become known, and further details on the future state and change impacts will become clearer. As a result you will have to continually revise and update your change management plan to ensure the change management activities are addressing the change appropriately and supporting the project/ work stream's objectives.

Change Management Plan: Stage 2

SSA Change Management Toolkit: EXAMPLE CHANGE MANAGEMENT PLAN												
Change Management Activities	Year 1											
	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Stage 2: Solution Design												
Develop stakeholder engagement and communications plans												
Develop stakeholder engagement plan												
Develop communications plan												
Plan and deliver Stage 2 engagement and communications activities												
Develop and launch change network activities												
Identify change leaders and launch change network												
Construct change network processes and materials												
Develop change leadership capability												
Engage and utilise the change network (Stage 2)												
Design L&D strategy												
Confirm the Learning & Development Scope												
Complete Learning Needs Analysis												
Develop the L&D Strategy and Approach												
Complete the learning plan and schedule												
Complete the Learning Plan												
Complete the Learning Schedule												
Develop Implementation Plans												
Develop the CM Implementation & transition plans												
Integrate CM Implementation plan into the project plan												
Execute the CM Implementation Plan												
Continue to revise and update plans												
Revise and update Change Management Plan												
Revise and update Stakeholder Engagement Plan												
Revise and update Communications Plan												
Revise and update Change Impact Assessments												
Revise and Update Stakeholder Analysis												
Revise and Update Change Risk Register												

Change Management Plan: Stage 3

SSA Change Management Toolkit: EXAMPLE CHANGE MANAGEMENT PLAN												
Change Management Activities	Year 1											
	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Stage 3: Solution Delivery												
Execute L&D programme												
Develop learning materials												
Conduct train-the-trainer and learning pilots												
Update learning schedule												
Conduct learning sessions												
Execute Change Management activities												
Plan and deliver engagement and comms activities (Stage 2)												
Engage and support the change network												
Complete Business Readiness Assessment												
Execute Change Management Implementation Plans												
Execute activities in the implementation plan												
Update and revise implementation plan throughout phased delivery												
Monitor & measure adoption												
Continue to manage risks and issues												
Continue to revise and update plans												
Revise and update Change Management Plan												
Revise and update Stakeholder Engagement Plan												
Revise and update Communications Plan												
Revise and update Change Impact Assessments (Macro and Micro)												
Revise and Update Stakeholder Analysis												
Revise and Update Change Risk Register												

Change Management Plan: Stage 4

SSA Change Management Toolkit: EXAMPLE CHANGE MANAGEMENT PLAN												
Change Management Activities	Year 1											
	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Stage 4: Close & Handover												
Complete Lessons Learned												
Conduct a post transition assessment												
Assess change management effectiveness												
Transition training to BAU												
Continue to monitor & measure adoption												
Embed continuous improvement activities												
Develop an initial, high-level continuous improvement framework												
Evaluate and support continuous improvement activities												
Evaluate Benefits												

The Key Elements of Project Management (1/2)

1. **Governance-enabled decision-making:** Decisions will be required throughout the life cycle of a project — such as how to deal with an issue, or whether to implement a change. Effective project management ensures that information and reporting flows, meeting cycles and governance bodies are all appropriate to the needs of the project allowing decisions to be made promptly.
2. **Managed risks and opportunities:** It is important that risks are defined, understood and managed throughout the lifecycle of a project. Managing risk involves identifying and analysing the risk, developing a plan to reduce, eliminate or tolerate the risk, then monitoring the risk.
3. **Delivery-enabling plans:** Plans show who does what, when, and how many resources are needed to achieve each of the project milestones. It is essential that milestones are clearly defined and that detailed, realistic planning are in place in order that the whole project team can work together to deliver.
4. **Focused benefits management:** This is about estimating, measuring and monitoring the benefits the organisation will gain from the project and the rationale behind the project. In most cases benefits will be achieved after the project has completed - so plans and monitoring must be in place.
5. **Engaged stakeholders:** This is about identifying, evaluating, informing and influencing the individuals and groups who are affected by, or who influence, the project. It is important that those individuals and groups who are essential to the success of the project are working effectively towards achieving its objectives.
6. **Clear scope:** The scope should be realistic, managed and defined in terms of key deliverables and associated cost, time and quality constraints. The business case must be clear and have ongoing validity.
7. **High-performing teams:** It is essential that everyone involved in a project, at every level, understands who is doing what, how, why and when. To develop a high-performing team with good project management, clear roles and responsibilities and shared ownership of the project vision is essential.
8. **Smart financing:** This is about efficient and effective management of the project budget, making the most of the money available. Project managers should be creating efficiencies within the project to ensure that benefits are realised at minimum cost whilst still delivering appropriate quality.

The Key Elements of Project Management (2/2)

9. **Integrated suppliers:** It is important to liaise with suppliers, understand and plan for dependencies on supplier products or activity, and bring them into project management plans and processes.
10. **Active quality management:** It is critical to define and track quality considerations from the outset of a project. There must be a shared understanding of what outputs the project will deliver and how these will be monitored and judged, taking into consideration the wider context of the work.
11. **Embedded life cycle assurance and learning:** Project assurance is designed to check that a project is well-founded and being conducted appropriately — regular assurance activity should be built into the life cycle. In addition, lessons learned should be recorded and shared on a regular basis.
12. **Agile change control:** All projects experience changes - in scope, timeline, budget, quality or purpose. A clearly defined change control process ensures that the impact, costs and benefits of changes are known before sign off is sought with the client/project governance.

Features of VMS (1/5)

Stage	Features
 <p>Needs Analysis</p>	<ul style="list-style-type: none"> • Automated report generation (organisation insights, recruitment insights, volunteer insights, custom reports) • Volunteer analytics (demographics, attendance and hours, years of service, report export) • Activity analytics (activity aggregation, attendance & hours by activity/batch/session, report export) • Volunteer persona (automated generation of matching of ideal volunteer profile for opportunities)
 <p>Management Policies</p>	<ul style="list-style-type: none"> • Automated report generation (organisation insights, recruitment insights, volunteer insights, custom reports) • Volunteer persona (automated generation of matching of ideal volunteer profile for opportunities)
 <p>Recruitment</p>	<ul style="list-style-type: none"> • Volunteer recruitment platform (applications, background screening, approval) • Orientation (orientation batch & session creation, add volunteers as attendees, attendance marking, attendance export) • Volunteer analytics (demographics, attendance and hours, years of service, report export) • Activity analytics (activity aggregation, attendance & hours by activity/batch/session, report export) • Volunteer persona (automated generation of matching of ideal volunteer profile for opportunities) • Volunteer matching (automated matching of volunteers to activity based on history & personality profile) • Social media integration and targeted outreach

Features of VMS (2/5)

Stage	Features
 <p data-bbox="197 819 355 853">Onboarding</p>	<ul data-bbox="451 528 1468 1061" style="list-style-type: none"> • User Creation (Account creation, Password expiry date, password change) • Groups (Group creation, database, assign volunteers to groups) • Organisations/CSR Partners (Registration forms, database & search, org. profiles, org. volunteer database) • Volunteer recruitment platform (applications, background screening, approval) • Orientation (orientation batch & session creation, add volunteers as attendees, attendance marking, attendance export) • Membership (registration, renewal, export of membership receipts) • Volunteer matching (automated matching of volunteers to activity based on history & personality profile)
 <p data-bbox="221 1512 331 1545">Training</p>	<ul data-bbox="451 1115 1468 1780" style="list-style-type: none"> • Groups (Group creation, database, assign volunteers to groups) • Organisations/CSR Partners (Registration forms, database & search, org. profiles, org. volunteer database) • Automated attendance taking (check in/out, session attendance selection) • Training (trainings batch & session creation, add volunteers as attendees, attendance marking, attendance export) • Internal course registration (Course display and selection page, volunteer registration, integration with activity attendance) • Mobile app (Listing of opportunities, online registration, attendance taking, alerts and reminders) • Virtual kiosk for mobile devices (for attendance taking, volunteering activities, etc.) • Volunteer matching (automated matching of volunteers to activity based on history & personality profile)

Features of VMS (3/5)

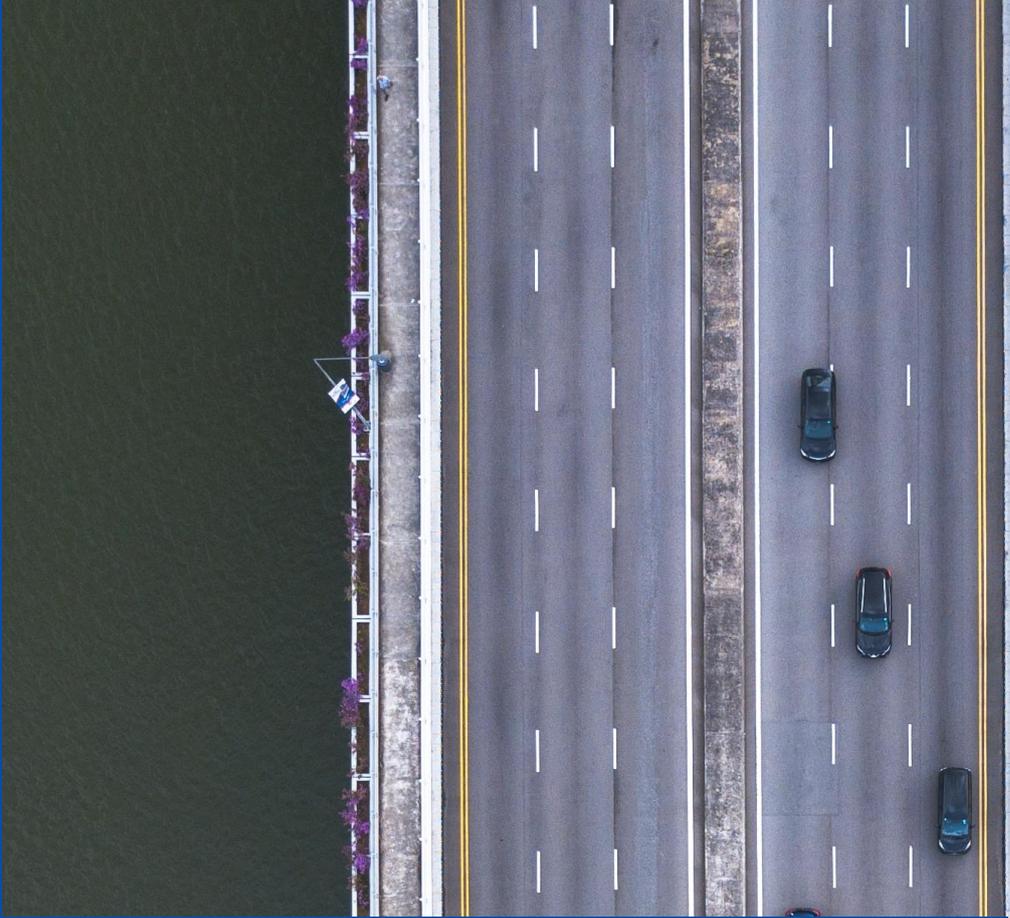
Stage	Features
 <p>Supervision</p>	<ul style="list-style-type: none"> • Automated attendance taking (check in/out, session attendance selection) • Volunteer interface platform (publish scheduled opportunities by date/event/etc, filter volunteers based on availability/proximity/language spoken, wait listing, volunteer review/feedback of activities) • Regular activities (regular activities & session creation, add volunteers as attendees, attendance marking, attendance export) • Events (event & session creation, assign roles, add volunteers as attendees, attendance marking, attendance export) • Services & skilled volunteer activities (create service-based activities, add volunteers as attendees, attendance marking, attendance export) • Automated alerts (Thank you notes, reminder alerts, birthday messages) • Mobile app (Listing of opportunities, online registration, attendance taking, alerts and reminders) • Virtual kiosk for mobile devices (for attendance taking, volunteering activities, etc.)
 <p>Recognition</p>	<ul style="list-style-type: none"> • Regular activities (regular activities & session creation, add volunteers as attendees, attendance marking, attendance export) • Events (event & session creation, assign roles, add volunteers as attendees, attendance marking, attendance export) • Services & skilled volunteer activities (create service-based activities, add volunteers as attendees, attendance marking, attendance export) • Automated alerts (Thank you notes, reminder alerts, birthday messages) • Mobile app (Listing of opportunities, online registration, attendance taking, alerts and reminders) • Virtual kiosk for mobile devices (for attendance taking, volunteering activities, etc.) • Volunteer analytics (demographics, attendance and hours, years of service, report export) • Activity analytics (activity aggregation, attendance & hours by activity/batch/session, report export) • Volunteer badges (automated reward system when volunteers reach specific milestones or achievements)

Features of VMS (4/5)

Stage	Features
 <p>Feedback</p>	<ul style="list-style-type: none"> • Volunteer interface platform (publish scheduled opportunities by date/event/etc, filter volunteers based on availability/proximity/language spoken, wait listing, volunteer review/feedback of activities) • Regular activities (regular activities & session creation, add volunteers as attendees, attendance marking, attendance export) • Events (event & session creation, assign roles, add volunteers as attendees, attendance marking, attendance export) • Services & skilled volunteer activities (create service-based activities, add volunteers as attendees, attendance marking, attendance export) • Mobile app (Listing of opportunities, online registration, attendance taking, alerts and reminders) • Virtual kiosk for mobile devices (for attendance taking, volunteering activities, etc.)
 <p>Exits/Offboarding</p>	<ul style="list-style-type: none"> • Volunteer interface platform (Review/feedback of activities, volunteer interview) • Volunteer analytics (demographics, attendance and hours, years of service, report export) • Activity analytics (activity aggregation, attendance & hours by activity/batch/session, report export)
 <p>Database</p>	<ul style="list-style-type: none"> • User Creation (Account creation, Password expiry date, password change) • Admin Rights (View, Create, Edit, Delete admins and sub admins) • Volunteer interface platform (publish scheduled opportunities by date/event/etc, filter volunteers based on availability/proximity/language spoken, wait listing, volunteer review/feedback of activities) • Groups (Group creation, database, assign volunteers to groups) • Organisations/CSR Partners (Registration forms, database & search, org. profiles, org. volunteer database) • Membership (registration, renewal, export of membership receipts) • Automated report generation (organisation insights, recruitment insights, volunteer insights, custom reports)

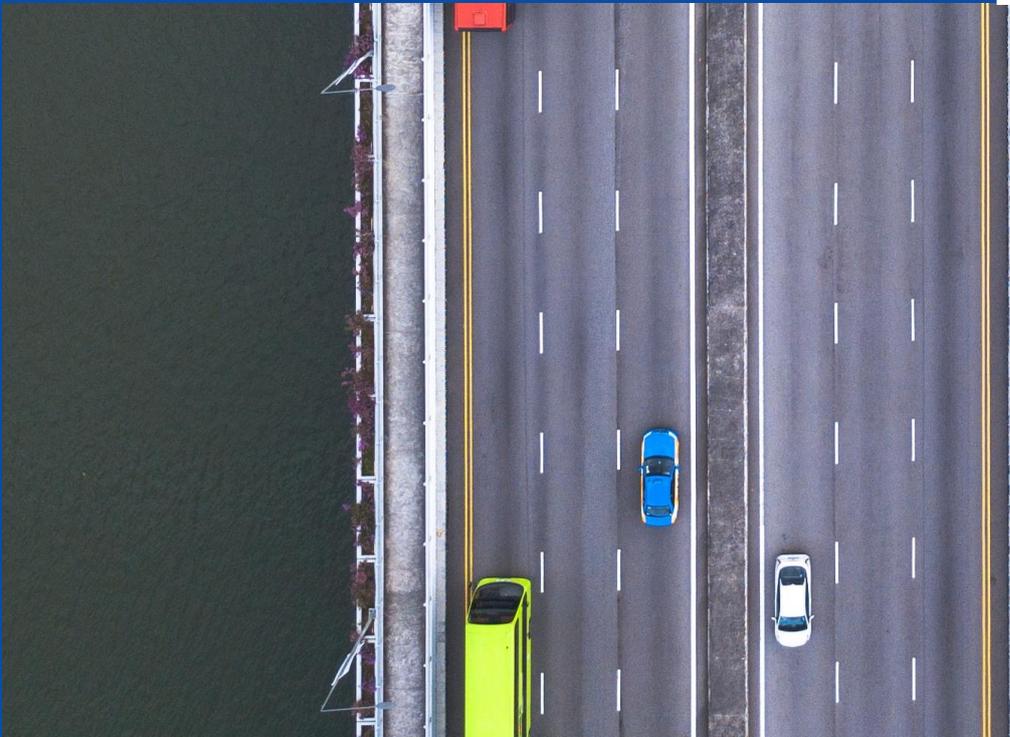
Features of VMS (5/5)

Stage	Features
 <p data-bbox="183 757 370 857">Programme Management/ Evaluation</p>	<ul data-bbox="451 533 1469 1081" style="list-style-type: none">• Regular activities (regular activities & session creation, add volunteers as attendees, attendance marking, attendance export)• Events (event & session creation, assign roles, add volunteers as attendees, attendance marking, attendance export)• Services & skilled volunteer activities (create service-based activities, add volunteers as attendees, attendance marking, attendance export)• Automated report generation (organisation insights, recruitment insights, volunteer insights, custom reports)• Volunteer analytics (demographics, attendance and hours, years of service, report export)• Activity analytics (activity aggregation, attendance & hours by activity/batch/session, report export)



8

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