

# VMS



**BLACKLAND PRAIRIE CHAPTER  
CONVERSION TO VMS  
AND  
TRAINING THE ADMINS AND CHAPTER  
SEPTEMBER 21, 2015**

# Overview



- This presentation is intended to pull together the tools and techniques that the Blackland Prairie Chapter used to both
  - Implement the VMS system for the chapter and
  - Train the Admins and chapter members in its use
- Provide some Lessons Learned

# Background



- The Blackland Prairie chapter was formed in 2006
- It has trained ~320 people with ~180 people active in 2015
- A proprietary web-based hours entry system was implemented in 2010 and used through 6/31/2015
- Very good annual records were kept by our previous Membership chair in the form of an excel spreadsheet
  - One line per member
  - One AT/VH column pair for each year

# Primary Conversion Issues



- (Minor) resistance to change from a working system
- (A few) members who had difficulty (i.e. did not want to change) adjusting to the change
- Getting the initial Member info uploaded
  - Harmonizing people already in the TPWD with those in our TMN Chapter – we had a dozen potential conflicts but only one that actually caused a problem
  - Getting our data (CBC, Names, Contact info, awards info) pulled together from a variety of spreadsheets and put into the state's required upload format
- Getting the initial Historical Hours info uploaded
  - Changing from our hours database format to the state's required upload format

# 45-Day Policy Objections



There was a significant amount of grumbling about this restriction. These complaints largely went away once the following email was sent to the entire chapter.

***The reason for this limit is NOT arbitrary or just to make things difficult. It is a requirement of all Federal and State Grants that the TMN program receives.***

*For each hour of Volunteer time, the state gets \$23 in 'credit' or recognition that can be used to apply for and justify federal and state Grants. Michelle and the local Agrilife office are often required to generate reports on Grants awarded to both the Federal and State levels as to how much volunteer time is expended each month. In the past, at least for our chapter, there have been instances where people have not put in hours for months at a time (in at least one case 6-months). Multiply this by the 50+ chapters across the state and this means that the reports Michelle has generated can seriously under-report the hours expended.*

*Yes, it probably all gets entered and averaged out over the year, but it gives a misleading record of when TMNs are most active (and least) and it most likely does not meet the conditions of the Grant.*

*In addition, there is or may be some level of auditing by the entity giving the Grant money. If they see fewer hours expended compared to what was forecast, this can cause a problem as well.*

# Conversion Tools Developed



- An Excel VBA program that converted the historical VH/AT info
  - FROM: our simple 320-rows by 20-columns spreadsheet
  - TO: the state's format of almost 7000-rows by 15-columns
- An Excel VBA program that converted our Member contact info
  - FROM: our simple 320-row by 10 column spreadsheet
  - TO: the state's format of 320-rows by 86-columns
- An Excel program to calculate year hours awards were earned based on our by-year hours data
- These programs took a while to generate but eliminated human error once finished

# Conversion Timeline – Things happen Fast

## Phase I – Initial Preparation & Upload



- 4Q14 – Chapter volunteered to be in the 2<sup>nd</sup> group
- 4/8/15 – Michelle announces 2<sup>nd</sup> phase update
  - Provides info links and upload templates
  - May 1<sup>st</sup> Deadline for people and historical hours spreadsheets
- --- Big Denial (lets be honest) and I put it off until -----
- 4/25/15 – We finally get started and I ask for extension
- 5/1/15 – Michelle extends deadline for 1 week and panic work begins on Excel VBA programs to convert our people and hours records to state's format
- 5/4/15 – We ask about bulk uploads of Opportunities.
  - Michelle says must be entered manually and sends example project spreadsheets
- 5/7/15 – Spreadsheets for 320 people and 7000 Historical hours sent to Michelle
  - General notice to Chapter Board and Membership that switchover time was eminent

# Conversion Timeline – Things happen Fast

## Phase II – Opportunities and Admin Training



- 5/13/15 – Initial work on Opportunity Spreadsheets begins and continues through next 4 weeks
- 5/21/15 – Query to Michelle on “*When’s Training?*”
- 6/2/15 – First communication with Cheryl Foster about Training
- 6/4/15 – Specific Rollout Plan announced at June Board and Chapter meetings
  - Members encouraged to archive and backup their personal 1H15 hours - Just in case - and told to keep track of their hours on paper between 7/1 and 7/15
  - Old electronic hours entry system would be shut down and archived June 28<sup>th</sup> at midnight (actually done at midnight June 31 to allow for the inevitable stragglers)



# Conversion Timeline – Things happen Fast

## Phase II – Opportunities and Admin Training



- 6/8/15 – VMS team identified and notified about initial training date
  - Cheryl gets People data uploaded into VMS system and work begins to resolve CBC discrepancies and already existing TPWD usernames
- 6/17/15 – 3-hr Initial Training webinar with Cheryl
  - Opportunity Spreadsheets were a good exercise but had to be junked as the Opportunities organization was rethought wrt the BPTMN needs & previous practice
- 6/18/15 – First Opportunity entered
- 6/30/15 – Initial Opportunity entry completed including an  
Old → New Opportunities Cross Reference ( 200+ → 72)

# Conversion Timeline – Things happen Fast

## Phase III – Beta Testing



- 7/1 /15 – Beta test of VMS system using 21 Board & Chapter Members
- 7/7/15 – Preliminary dropdown lists pre-entered for 140+ Members in Good Standing based on 1H15 hours they had already entered
- 7/8/15 – Rollout finalization plans complete
- 7/9/15 – Board approves Rollout plans & 1H15 Historical Hours sent to Cheryl

# Conversion Timeline – Things happen Fast

## Phase IV – System Rollout to Chapter



### **7/14/15 – Rollout at July Chapter Meeting**

- UserIDs and Passwords were handed out
- VMS Rollout Reference Manual was handed out
  - (4 pages) Quick-Start guide to Login & Service Entry
  - (2 pages) Opportunities List (72 Opportunities)
  - (6 pages) Old → New Opportunity Cross Reference
  - This is also sent via email to people not at the meeting and also available from the chapter website
- 1/2 hour Power Point training to ~60 members after July chapter meeting (also available from the website)
  - Additional 1/2 hour sessions after August & September meetings that were more Q&A elaborations of repeated questions or problems we've seen
- Series of *short 1-page* How-To documents (more being developed)
  - VMS How to – Accept volunteer hours entered
  - VMS How to – Find life hours
  - VMS How to – Determine if you've re-certified for the year

# Statistics



- Conversion time span – 11 weeks – Late April through mid July
- ~ 300+ Emails sent by me with VMS in title or body
- ~275+ Emails sent to me with VMS in title or body
- Approximate Hours expended - ~325
  - ~ 150 President/Webmaster/VMS Coordinator (initial data load)
  - ~ 40 VHAT Chair (Opportunities)
  - ~ 40 Volunteer Assistant (Opportunities)
  - ~ 15 CBC Agent (CBC verification – with AgriLife office here)
  - ~ 80 Membership Chair (membership entry)
- Official Rollout – July 14
- Usage from July 1 – September 20(11.5 weeks)
  - 100 people out of 166 active members have used 42 out of 78 Opportunities
  - They've entered 2903 VH and 368 AT hours by going to the system 1149 times.

# Recurring Issues



- People forgetting to enter # of hours
- People not matching Opportunity Title to Opportunity type
  - Service Hour Opportunity type selected for AT in dropdown and vice versa.
- People complaining that they put in TMN hours but their TPWD totals show zero
- Confusion over logging into our site vs logging into the state VMS site.
  - Solved by creating a login page on OUR site.

# BPTMN Hours Login Page



- Our previous Hours entry page was re-directed to a new VMS entry page on *our* site instead of the TPWD site
- This had the following Benefits
  - No confusing TPWD features or advertisements
  - Faster loading than TPWD login site
  - Members still see our site's notifications and announcements
  - Members have a “stoplight” warning reminder about the 45 day rule

# BPTMN Hours Login Page (cont)



Home Calendar Info Hours Docs/Forms Class Info

**T E X A S**

## Blackland Prairie Master Naturalists

Texas AgriLife Extension Service and Texas Parks & Wildlife

Master Naturalist 

**Useful Links**

[Report Website/VMS Issue](#)

**Member Login**

Login

**Current Weather**

McKinney 7:16 PM  
73°F

  
LIVE su mo tu  
ToWindows.com MWS

**Contact Us (email the chair)**

### BPTMN Volunteer Management System (VMS) Login

This is a quick-loading no-frills log-in link to the State VMS Hours Reporting system.

- ✓ [One-page cheatsheet](#) on how to enter your hours
- ✓ [VMS FAQ](#) and [VMS Help Page](#)
- ✓ See [TPWD's Official Volunteer login site](#) if you need to reset a lost password.
- ✓ Contact [vhat@bptmn.org](mailto:vhat@bptmn.org) to have an [Approved Opportunity](#) added to your dropdown list

VMS UserID:

Password:

**Hours on or before Aug 05, 2015 may not be entered**

You have until the end of	To enter Hours worked on
Today	Aug 06, 2015
Sep 28, 2015	Aug 09, 2015
Oct 07, 2015	Aug 28, 2015
Oct 21, 2015	Sep 06, 2015
Nov 04, 2015	Today

**Hours on or after Sep 21, 2015 may not be entered**

# BPTMN Hours Login Page (cont)



- <http://bptmn.org/hours>
  - Code to implement this on your website is available to your chapter's webmaster
  - A version of this will become the login site for the TMN program in the near future, eliminating the TPWD login site

VMS UserID:	<input type="text" value="crcamp"/>
Password:	<input type="password" value="●●●●●●●●"/>
<input type="button" value="Login"/>	

<b>Hours on or before Aug 05, 2015 may not be entered</b>	
You have until the end of	To enter Hours worked on
Today	Aug 06, 2015
Sep 23, 2015	Aug 09, 2015
Oct 07, 2015	Aug 23, 2015
Oct 21, 2015	Sep 06, 2015
Nov 04, 2015	Today
<b>Hours on or after Sep 21, 2015 may not be entered</b>	



# Lessons Learned



- Don't procrastinate getting started
- State issued deadlines are pretty solid
- VMS Staff people are incredibly knowledgeable, innovative and helpful
- Your chapter may have some unique requirements
- Get your documentation straight first
  - The People & Historical Hours spreadsheets need to be accurate - they can only be bulk uploaded once
- Take the offered VMS Admin Training
- Pick a clean break point to switch from old system to new – IMO, end of quarter is best
- Decide how you want to organize your Opportunities and how to distribute them to members

There are two basic mechanisms

- All Members get all Opportunities in their dropdowns and delete the ones they don't want
- Each member gets only those Opportunities they request in their Dropdowns

# Lessons Learned



- Have a roll-out plan
  - It doesn't need to be extensive but does need to be thought out
- Expect *minor* setbacks and delays – there is a lot that the state staff have no control over
- Use experiences of other chapters who have already gone through this
- Plan on developing your own documentation that is customized to the needs/expectations of your own chapter – We have two sites for this if you want to look at them
  - [vmshelp.bptmn.org](http://vmshelp.bptmn.org) for general member help
  - [vmsadmin.bptmn.org](http://vmsadmin.bptmn.org) for admin help

# Member Mental Adjustments



From an Admin standpoint, we found the following helped some members bypass some mindsets

- New Opportunities have to be requested and approved by the Board – no different from before
- Adding items to members' dropdown lists
  - No approval necessary as long as its already on the Approved Opportunity list
  - We don't "approve" new dropdown requests – we just add them based on an email request
  - They have to ask us only so that we can "customize" their dropdowns
  - We preloaded members dropdowns with those Opportunities they had already used in 1H15
- Approving Hour Submissions – We "accept" them as the mechanism that VMS uses to enter hours. We don't accept them immediately to allow people time to make changes.

# Useful Hidden VMS Tools



- Members can *delete* items from their dropdown lists themselves if you have the right settings on the Opportunity Logistics Tab
- Admin *Email* is an extremely powerful mail-merge tool for notifying multiple people in an individually customized fashion. You can make and save your own templates
- You can make and save your own grids with data that you find most useful.

# BPTMN Resources Available to Help



- <http://vmshelp.bptmn.org>
  - Our set of member FAQs and 1-page How-to documentation
  - Specific to TMN w/o TPWD generic items
- <http://vmsAdmin.bptmn.org>
  - Our set of Admin Documentation
  - Specific to TMN w/o TPWD generic items
  - Includes Word Source Files for both Admin and Member help
- <http://bptmn.org/hours>
  - Our “Stoplight” login page
  - Code available to your webmaster
  - Our Login page can be used by anybody if you want to try it out

# Questions?

