

Volunteers: How to Define Skills and Skill Types

| <i>Speech</i> | <i>Cursor/On-Screen</i> |
|---|--|
| The Volunteer Add-on allows you to record a number of things about your volunteers, like their skills and abilities. Before you can record this information about your volunteers, your Sumac Administrator must define the Skills and Skill Types that will be available in your database. | |
| In your Sumac console, expand Utilities, Customize Database, then choose Lookup Lists | Show console. Expand Utilities, Customize Database, Lookup List |
| Choose the Area: Volunteers, then choose the Lookup List you want to edit. | Choose Area: Volunteers. Point to available Lookup Lists |
| In Sumac, all the Skills you record about your volunteers are organized into different Skill Types. With that in mind, before you can define a Skill, you must define some Skill Types. | Point to Skill. Point to Skill Types. Select Skill Types. |
| You'll see all the existing Skill Types at the bottom of this window, and we click New to add a New one. | Point to Skill Types at bottom. Click New |
| When defining a Skill Type, all that is required is a description, so it's a good idea to think about how you would like to classify the different Skills your volunteers. | |
| For example, you might want to record that your volunteer can speak different languages, like French or German. That ability would fall under a Skill Type like "Language Skills." | Enter "Language Skills" in Description field. |
| Click OK, and Sumac saves the new Skill Type into the database. | Click OK. Point to new Skill Type |
| Many organizations track whether or not a volunteer has completed any necessary volunteer training for things like workplace safety or training on how to interact with clients. Those Skills could be classified under a Skill Type like "Training." | Enter "Training" in Description field. Click OK, point to new Skill Type. |
| Another common Skill is whether or not a volunteer has submitted any necessary references, or a criminal background check. Those Skills could be classified under a Skill Type called "Background Check." | Enter "Background Check" in Description field. Click OK, point to new Skill Type. |
| Now that we've defined the Skill Types, we can start adding the Skills to the database. | |
| Choose the Lookup List for Skills, | Select Skills Lookup List |
| and click New to add a new one. | Click New |
| Let's use some of the examples mentioned earlier and set up Skills for things like languages, training, and background checks. | |
| First let's add a Skill to use when a volunteer can speak French. | |

| | |
|---|---|
| The name for this Skill is French, and it falls under the Skill Type “Language Skills.” | Type “French” in Name field. Choose Skill Type: Language Skills |
| Click OK, and Sumac saves this Skill into the database. | Click OK. |
| | Add a similar skill for Spanish and German to create more examples |
| Now we'll add some Skills for training programs. | Click New. |
| The name for this Skill is “Training Complete,” and it falls under the Skill Type “Training.” | Type “Training Complete” in Name field. Choose Skill Type: Training. Click OK. |
| | Add similar skill for Volunteer Induction Course and Organization Procedures Course |
| Finally, we'll add Background Checks. | Click New. |
| The name for this Skill is “Police Check,” and it falls under the Skill Type “Background Check.” | Type “Police Check” in Name field. Choose Skill Type: Background Check. Click OK. |
| | Add similar skill for Employer References |
| Now that we've defined these Skills in the database, we can start recording them for our volunteers. | Close Lookup List window. |
| In your contact list, open a volunteer's contact record. | Open Contacts. Open a Contact record. |
| In the contact record, Skills are recorded on the Facts tab. | Go to Facts tab. |
| Click New, | Click New |
| and choose that you want to add a new Skill. | Click Skill |
| Click the Choose button, | Click Choose |
| And expand the Skill Type you're interested in. For this example, let's mark that this volunteer has a valid police check, which falls under “Background Check.” | Expand Background Check |
| Select the Skill, then click OK | Select Criminal Background Check. Click OK. |
| You could also record the name of the person who checked this Fact, the date the checked it, and the next validation date for this Skill. | Point to Checker, Checked When, and Next Validation. |
| This is especially handy for qualifications like police checks, or driver's licenses, which might need to be updated on an annual basis. If you have Sumac's Reminders module, Sumac can automatically create a reminder for you to verify the skill a year from now. | |

Click OK, and Sumac saves the Skill for this volunteer into your database.

Click OK.

Check out more training videos to learn more about Sumac.