

## Case Study: Social Paws

Social Paws is a fictitious case study, based on a nationwide scheme that enhances health and wellbeing in the community, by organising visits to hospitals, hospices, nursing and care homes, special needs schools and a variety of other venues for volunteers and their pets. The following is the (tidied up) transcript of a fictitious interview with Sally, who is the Director of Social Paws.

[Introductions and pleasantries between the interviewer and Sally]

Q. So can you tell me what your company does?

A. Well, in a nutshell, we provide a service to local communities, by putting our volunteers in touch with organisations that would like to be visited by friendly, well trained pets.

Q. Can you tell me how your current system works?

A. To be honest, it's a bit of a shambles at the moment. Over the last few years, we have grown beyond our wildest dreams, and our system and processes have not been able to keep up. I'll start at the beginning...

If a pet owner is interested in becoming a volunteer with us, they can use our website to request an application form, which has a few different sections. We send that out in the post along with a letter that tells them who their local coordinator is, and what their registration number is.

Firstly they need to get in touch with their local coordinator to have a chat about what they want to do in terms of visits and commitment, and to find out where they can get their pet assessed by a vet or one of our approved assessors. They then need to fill in the application form with some information about themselves and their pet, then there is a section that needs to be completed by the vet or approved assessor, which assesses the behaviour of the pet. The final section requests details of two people who we can contact for character references for the applicant. They then send the completed form back to us by post along with a photograph of themselves and their pet, and a cheque to cover part of the cost.

Q. Okay, that sounds okay so far... what happens next?

A. Once we get the form back, we follow up on the references by email, and wait for them to come back. The form is filed in alphabetical order in the 'pending' folder until we hear back from the referees. Sometimes they reply quickly, which is great, but sometimes they don't reply at all. Once we have both references back, if they are okay, we print a certificate saying they are a volunteer with us, make a badge for the pet and owner, then send all of that back to the applicant along with an information booklet and an agreement form. The application form, copies of the references and any other correspondence is filed in a folder in order of the registration number.

Q. What happens if the referees don't send the references?

A. If they don't reply, the application form just stays in the 'pending' folder. Sometimes the applicant gets in touch to ask what's going on, and if they do that, we will ask the referees again for a reference. Sometimes the applicant gives us another referee.

Q. Okay, so do you keep any of this information electronically?

- A. Not really, no. The website sends an email when someone requests an application form, and the references come in via email, but that's all. We print all of that and keep it in the folders, as I already said.
- Q. So you don't know who you have as volunteers without checking the folders? How do you know how many volunteers you have without manually counting them?
- A. Oh, we have a list of all our volunteers that we keep in an excel spreadsheet. We need that so that we can contact our volunteers about a month before their annual renewal, so that they can either send us their renewal cheque or tell us that they are no longer interested in volunteering with us.
- Q. Right. So you keep a list of volunteers in a spreadsheet, and a paper file/folder with all their details. What happens when one of your volunteers moves house or decides to quit?
- A. If they move house, or change their name or any other of their details, we update the spreadsheet and file a copy of the notification in their folder. If they decide to stop volunteering for any reason, we take them off the spreadsheet and move their file/folder to another drawer labelled 'archive' where we file it alphabetically by surname. To be honest, I'm not sure that the spreadsheet or the folders are up to date. Sometimes the changes only get done in one of those places, which means that we may ask for renewals from people who don't want to be part of it any more, or their address is wrong on the list and we can't get in touch to renew them.
- Q. That's quite a big problem then. What other data do you need to keep track of?
- A. We keep details of all our volunteers as I already said, plus the area coordinators and it would be good if we knew which area coordinators were allocated to which volunteers. We also keep a list of the places that our volunteers go, so that we are insured in case something happens there. It is very rare, but sometimes a patient may get bitten or scratched by one of the pets for example. On the first visit to a new place, the volunteer has to get a form signed by the manager or owner, and send the form back to us.
- We also have a list of places that have requested a visit from our volunteers, so that we have places ready and waiting. This is quite hard to keep up to date, as it changes on a weekly basis as places take on new volunteers.
- Q. Okay, that all sounds reasonable. Is there anything else?
- A. We also have the online shop. Well, it's not really an online shop, but it looks like it is to customers. All our products are up there, and you can buy from it and pay for it, but once an order has been placed, we get an email from the system with the details of the order and it is all dealt with from our office. We don't sell many different items, so it doesn't take up a lot of room, and it is quite easy to pick the order, pop it in an envelope and post it out. Only people registered as volunteers can buy anything from us, so that's one of the reasons we do it this way. We then file a copy of the order email in the volunteer's folder.
- Q. How do you check if the customer is a volunteer?
- A. As part of the ordering process, the customer has to use their registration number. We just trust that they are volunteers to be honest. Once the order has been sent out, we sometimes find that the customer wasn't one of our volunteers when we come to file it. That's a bit of a problem for us, as we only want to sell to our volunteers.
- Q. How many staff do you have?

- A. I now have five staff working for me in the office, they deal with all the queries from volunteers, companies, coordinators and organisations, along with updating the website, sorting the shop sales, renewing volunteers, etc. We are kept very busy. The office staff are full time paid staff; everyone else is voluntary.
- Q. Okay, thanks. I think I have a good idea now of the core of your business. Do you think there is anything else I need to know at this stage?
- A. No, I think that about covers it to be honest. The main problem is that we don't have a completely accurate list of our volunteers, which leads to problems for us. We started up about five years ago, and we only had about twenty volunteers for the first two years, but it has really taken off since then. I think we have over five hundred active volunteers now, and about twenty area coordinators that mentor them.

[Closing remarks between the interviewer and Sally]