

Volunteer Engagement Platform (VEP) Frequently Asked Questions

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- 1. What new features have been released so far in the new Volunteer Engagement Platform (VEP)?**
 - Q3 2023:** Our release in August of 2023 centers around **enhancements to the Supervisor experience**. This release includes:
 - Brand new Assign Roles screen that will allow Supervisors to see and manage access for all Recruiters & Supervisors in their chapter
 - Ability to have multiple Recruiters on one opportunity, and sunseting of the Reviewer role
 - Q2 2023:** In June of 2023, **we partnered with the ThoughtSpot team to deliver two new volunteer reports** providing access to data from VEP. These reports provide chapters with self-

service access to volunteer data for the first time. See the below *Data* section for more information on accessing this data.

- **Q1 2023:** In March of 2023, the first iteration of updates to the Volunteer Engagement Platform was released. This release prioritized **enhancements to the user interface and styles**. Included in that update was:
 - New mobile-friendly webpages
 - Updated styles throughout the web app
 - Transition from VRMS to VEP in naming
 - URL change from VRMS.pmi.org to Volunteer.pmi.org
 - Shift from Coordinator to Recruiter in naming conventions
 - Updated guidance for chapters on how to best use the system
 - New “Chapter Opportunities” screen that allows Chapter Supervisors to see all opportunities at the chapter, view applications, and extend offers
 - Also included in this release are bug fixes and minor enhancements.
2. **How can this new platform improve my experience recruiting volunteers for my chapter?**

The VEP is PMI's official volunteer recruitment tool and is the primary place interested volunteers can go to get involved. By utilizing the updated platform, your chapter can tap into over 100,000+ volunteers who have already expressed an interest in volunteering. With updated functionality and increased efficiencies, the new platform will provide a more user-friendly and integrated volunteer recruitment experience for chapters. In addition, use of the platform will ensure a chapter's volunteer community is integrated into PMI's global volunteer engagement efforts, training support, data collection, and recognition programs.
 3. **I have never used the VRMS, but I want to start using the VEP. How can I get started?**

Simply login to volunteer.pmi.org using your credentials for PMI.org (single sign-on) and start browsing the opportunities we have available. To use the system to recruit volunteers for your chapter, please contact your chapter partner or the Volunteer Engagement team at volunteer@pmi.org.
 4. **How can I access the new VEP?**

The new VEP can be accessed at Volunteer.PMI.org.
 5. **We have VRMS links saved on our chapter website. What should we do with those?**

To provide a seamless experience for your chapter members, we are asking for your help making updates to your chapter's website. All chapter websites should include a link to the VEP. Thousands of people seeking to engage with PMI via volunteering do so through the PMI.org website and search for opportunities in the VEP. Make sure your chapter is utilizing the new VEP to take advantage of connecting with new volunteers.
 6. **What changes are coming next?**

Later in the year into early 2024, VEP feature releases will focus on the volunteer experience, including search, applications, orientation, & onboarding. Stay tuned to PMInsight to stay in the loop on upcoming new features!
 7. **Why was the VRMS replaced?**

In support of PMI's continued commitment to our community, the project aims to provide a more user-friendly and integrated volunteer engagement platform. In support of PMI's volunteer

engagement strategy, the new platform will lead to greater impact through effective volunteer engagement, increased access to data and improved efficiencies for both individual volunteers and staff/chapter recruiters.

8. How is PMI approaching building the new Volunteer Engagement Platform?

PMI is taking great care to ensure we provide the best solution to meet the needs of the Institute, our chapters, and individual volunteers. We are taking an iterative and agile approach to the system replacement to allow us to deliver improved functionality to users faster. Currently, we are working on upgrading the user interface, testing features with users, and adding volunteer data to the ThoughtSpot platform. ThoughtSpot, recently launched as a replacement of the Chapter Reporting System, is a reporting service that allows chapter leaders the ability to customize reports to view and analyze data. Through our initial scoping exercises, we have determined that the Volunteer Engagement Platform will be overhauled in a phased approach throughout 2023 and beyond. As more information becomes available, we will communicate updates to the volunteer and chapter community.

9. I was a Coordinator/Supervisor/Reviewer in VRMS. Has any of my access changed in VEP?

No. If you were a Supervisor or Coordinator in VEP, you would still have the same access in VEP. Please note that Coordinator View is now called Recruiting. All PMI.org users are still able to access their volunteer profile to view and manage their information and service history, including current and/or previous volunteers, as well as continue to access functionality to recruit volunteers as a Supervisor/Coordinator. As new features are released, we will continue communicating instructions and updates to all users.

10. I can't find Coordinator view in the new VEP. Where is it located?

Coordinator View is now called Recruiting. If you were a Coordinator in VRMS, you would be a Recruiter in VEP. None of your access has changed, and all your opportunities are still assigned to you. You can click "Switch to Recruiting" in the side menu to access your Recruiter functions.

11. Will the VEP offer increased or enhanced reporting?

One objective of this project is to provide staff and chapter volunteer recruiters better access to on-demand reports and metrics related to volunteer interest, opportunities, applications, service history, etc. Two volunteer reports are now available in ThoughtSpot:

- Chapter Opportunities & Applications
- Chapter Member Service History

For access to ThoughtSpot, please reach out to your chapter president or PMI regional staff. They are most familiar with your specific chapter data needs! Your regional contacts can be found [here](#).

For ThoughtSpot specific questions, please contact ThoughtSpot@pmi.org.

12. What is ThoughtSpot, and where can I learn more about it?

PMI launched ThoughtSpot in July of 2022. Launching ThoughtSpot has enabled PMI to provide chapter leaders with the ability to access and analyze data like never before. This platform hosts the same data found in the Chapter Reporting System (CRS) like Prospective Membership, Certification, and Survey being analyzed in entirely new ways by leadership. **More information can be found [here](#).**

13. How is the new Volunteer Engagement Platform different from VRMS?

The VEP has an updated interface, mobile-friendly webpages, a new URL, and other new features. We are continuing to update the functionality with significant improvements based on user feedback while maintaining core features of VRMS.

14. How can I provide input into the new platform, as someone that used VRMS?

We appreciate your interest in this process and improving the volunteer engagement experience. PMI has already begun conducting user testing and gathering feedback on prototypes of the new platform through unmoderated testing, focus groups, and individual interviews. We will be asking volunteers and staff/chapter recruiters to continue to provide input into the new platform in a variety of ways, including via interview, survey, and user testing. We will communicate specific opportunities to participate. If you are interested in participating in this research, please contact us at volunteer@pmi.org.

15. Who is leading the project for this new platform?

Lauren Peiffer is the Volunteer Engagement Platform Owner. The project is owned by PMI's Volunteer Engagement department and the project team consists of cross-functional members from Digital Experience, UX, Data, Chapter Engagement, IT, and more.

16. Can I contact the project owner to provide my input?

You may contact the Volunteer Engagement department with VEP-specific inquiries/information at volunteer@pmi.org.

17. What is the new platform called?

The new platform is called the Volunteer Engagement Platform (VEP).

18. What training resources will be available for the new volunteer platform?

PMI will hold information sessions virtually over the next few months for volunteers to attend as needed. Stay tuned to [PMInsight](#) for more information when they become available.

19. How often can I expect updates on the new platform?

The new platform will follow a continuous delivery model designed to build, test, configure, and deploy new features and enhancements on an ongoing basis. You can expect new features to be released at least each quarter.

20. Is the VEP integrated with other PMI platforms such as the Component System (CS)?

There is a one-way sync from CS to VEP, meaning that when a new chapter leader is added to CS, that role will also appear in their service history in VEP on their profile. The VEP will eventually be integrated with several of PMI's core enterprise platforms, including chapter-specific systems such as ThoughtSpot, Component System, and the Learning Management System, among others.

21. What kind of access will be available to PMI chapters in the new VEP?

With the new platform, our goal is to provide PMI chapters with even more autonomy including necessary permissions and authority to manage your opportunities, applications, service history and reports on demand.