

# Data Management of Emergency Phone Service: Using a commercial product for non-profit groups



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Wildlife Victoria’s growth over the last few years has been enormous. It became necessary to find a better contacts management system than access to manage members, donors and volunteers. Having done some research into the products the options were narrowed down to two. First was a system designed for non-profits and the cost of the basic system was around \$15,000. The second option was Salesforce, an online system designed for commercial operators whose focus is Customer Relationship Management (CRM)”. CRM includes Sales, Marketing and Support, however the administration licenses were offered free of charge and we decided to trial the Salesforce version. Since then we have discovered that Salesforce is a very modifiable system and we now also manage all our rescue records through the emergency phone with plans for implementing management practices to enhance our system further.

The system is divided into two major functions:

1. Contacts management
2. Emergency Phone data-management and resource tool

## 1. Contacts Management

Manages all Wildlife Victoria’s contacts details for:

- a. Members
- b. Donors
- c. Volunteers

This includes all the standard information:

- a. Address
- b. Phone
- c. Email
- d. Membership status
- e. Do not mail/email options

And has non-standard facilities like:

- a. Type of volunteer
- b. Available hours
- c. Vehicle type
- d. Gun license

Records all Salesforce generated correspondence

- a. Merge documents including:
  - i. Membership renewal
  - ii. Donation receipting
- b. Emails including bulk emails

Records any financial payment made

Records any animal rescues that have been referred to contact via the Emergency Phone Operator



Records any training days attended  
 Records HTML emails separately  
 Option for up loading notes and attachments  
 Shows the postcodes that are covered as a volunteer  
 Types of volunteering contact is involved in  
 Records equipment on loan to the contact  
 Records rescue records (cases) input by the contact  
 Records cases managed by contact as an Emergency Phone Operator (EPO)  
 Shows all EP shifts covered by contact

Links to our website so that it automatically updates any:

1. Donation payments
2. Membership payments
3. Supplies payments
4. Volunteer registration
5. Training day registrations

## 2. Emergency Phone data-management and resource tool

This is a database that works alongside the Contacts Management (CM) database. It is linked and looks up the CM database for data and also updates some info to the CM database like animals referred via the EP, however it limits access to certain data allowing for confidentiality. This co-dependence means that the EP database is instantly updated when the CM is updated.

Features:

1. Password protected
2. Look up options
3. Roster integration including 'take' and 'cancel' options
4. Solutions search
5. Ideas tab for input by users
6. Recent items open

More features:

- Quick links to frequently used options
- Downloadable rescue record form for paper-based recording
- Download roster to Excel
- Download form for reimbursement submissions
- Download latest postcode manual for manual look-up
- Link to frequently used email addresses

Some of these features are to support dial-up users. The pages take a long time to load up on dial up so these users can record manually or download the latest contacts details and input their records after their shift or send to the office for input.

Solutions search links to items such as Wildlife Victoria protocols and procedures outlines, lists of lysavirus inoculated carers, species advisors, frequently asked questions and a host of other information for EPO's

Enter keywords to find matching solutions.  
 Search for:  in

**Browse Solutions**

**All Solutions**

- [Wildlife Rescue Procedures](#) [Wildline Operator](#)
- [Animal Information](#) [Fact Sheets for Animal Incidents](#)
- [Bands/Tags, Bats and Flying Foxes, Birds, Cetaceans, Dasyurids...](#)
- [Other Contact Numbers](#) [Postcode Manual](#)
- [Emergency Services and Electricity Corps](#)

**Solution Views**

View:

**Recent Solutions**

Solution Title	Solution Number	Status	Author Alias
<a href="#">Vagrant and Displaced Reptiles</a>	00000077	Reviewed	jchal
<a href="#">Reptiles/amphibians - Species Advisors</a>	00000074	Reviewed	jchal
<a href="#">Snakes and Reptile Veterinarians - Contacts</a>	00000075	Reviewed	jchal
<a href="#">Reptiles/amphibians - Other Contacts</a>	00000075	Reviewed	jchal
<a href="#">Inoculated Carers for bats and Flying Foxes</a>	00000077	Reviewed	jchal
<a href="#">Snake Handlers</a>	00000078	Reviewed	jchal

Entering a case:

All details of a call are recorded as a case and allocated a unique case number

We gather information such as where our number was sourced, caller information and we ask the callers permission to send out information about Wildlife Victoria and EPO tick a box to show they asked permission.

**Case Information**

Status:   
 Operator:   
 Call Date/Time:  [  
 Referrer Type:   
 Subject:

**Caller Info**

Caller Agreed to WV   
 Contact  Phone Number   
 Firstname:  Mobile Phone:   
 Lastname:  email:   
 Street:   
 Suburb:   
 State:   
 Postcode:   
 Country:

**Rescue Address**

Rescue at Callers Address   
 Address   
 Rescue Street:   
 Rescue Suburb:   
 Rescue State:   
 Rescue Post Code:   
 Rescue Country:

**Helpful Links**

- [Create New Rescue Record](#)
- [Printable Rescue Form](#)
- [Latest Roster Schedule](#)
- [Wildline Expense Reimbursement Form](#)
- [Post Codes](#)
- [Support for Wildline Online System](#)

**Helpful Contacts**

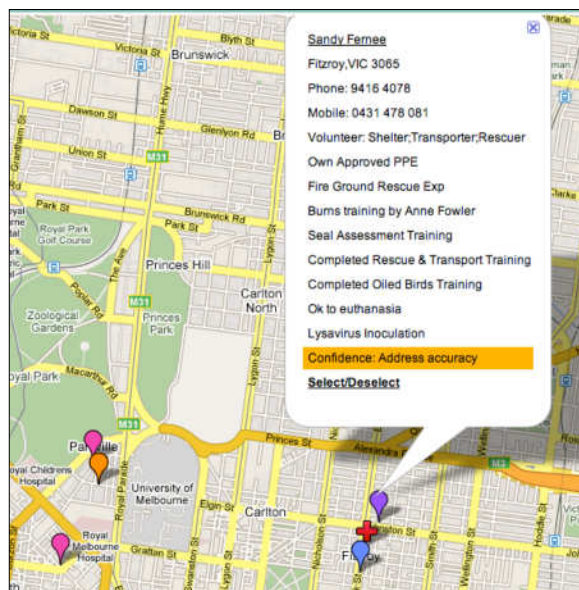
- [Roster Coordinator](#)
- [Manual Coordinator](#)
- [Liaison Officer](#)
- [EPO Manager](#)
- [Sandy](#)

An easy tick box if the rescue is at the same address as the caller or option to put in a different address

Details of the animal are then recorded. The red bars indicate required fields and the magnifying glass indicates a pick-list has to be used – this is for data-quality control Cause and Injury type are based around DSE reporting requirements for shelter operators, however we have added a few extra options where we saw a need to clarify some types of causes or injuries and also where DSE lacked options that occur frequently

The case is then submitted and a outline of the information is shown (part screen shot below)

Status	New	Date/Time Opened	7/07/2008 09:23
Operator	Sandy Fernee		
Call Date/Time	7/07/2008 09:14		
Referrer Type	White/Yellow Pages		
Subject	Flying Fox		

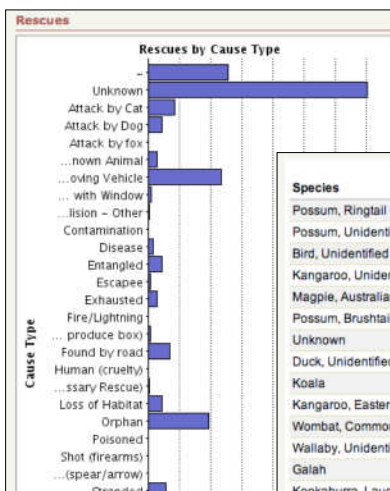


The final part of completing the case is to add the fate of the animal which can be done in 3 ways:

1. Add fate if the name of the shelter/foster/rescuer is known
2. Look up a list of referral options based on the postcode of the rescue
3. Go to map to view referral options. The rescue is shown by red cross, shelters indicated by a purple balloon, vets by a pink balloon, rescuer – orange, police – blue. Others include snake handlers. By clicking on the balloon the portal looks up relevant information from the CM database. Double clicking the balloon and then pressing 'submit adds the chosen person to the case and also

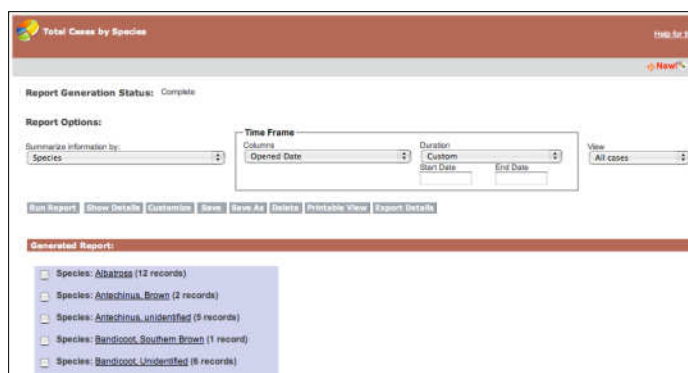
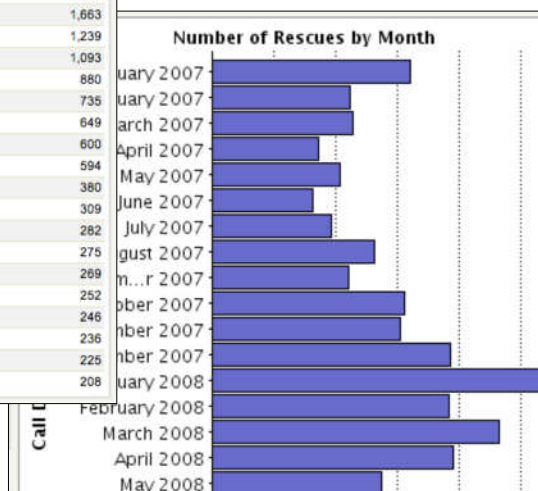
records this case against their contact details in the CM database.

Reports are generated through the Customer Management site and are only available on request.



Standard reports can be generated quickly and turned into graphs

Species	Record Count
Possum, Ringtail Common	1,976
Possum, Unidentified	1,889
Bird, Unidentified	1,663
Kangaroo, Unidentified	1,239
Magpie, Australian	1,093
Possum, Brushtail Common	880
Unknown	735
Duck, Unidentified	649
Koala	600
Kangaroo, Eastern Grey	594
Wombat, Common	380
Wallaby, Unidentified	309
Galah	282
Kookaburra, Laughing	275
Echidna, Unidentified	269
Pigeon, Unidentified	252
Rosella, Unidentified	246
Tawny Frogmouth	236
Possum, Eastern Ringtail	225
Owl, Unidentified	208



Other reports can be customised to suit the enquiry

Reports can be exported to Excel and we have had data requests from different sources including

### Future Plans

1. Integrate MYOB for easier reporting for the treasurer
2. Create a system of 'follow-ups' for each phone call to ensure that appropriate outcomes were had for each animal
3. Liaise with DSE to help Shelter Operators' reporting requirements by using this system
4. Cut down version of the portal site to make it easier for dial-up users
5. Create a 'Compliments and Complaints' process through the website for easy facilitation of mediation for complaints and addressing issues that arise

**Other benefits of the Salesforce system**

Online system:

Accessible anywhere internet access is available

No need for server

Multiple users

No program installation/costs

Latest technology instantly

Grows with the organisation

Our system is now easily transferable to any Salesforce Customer and can be tweaked for specific needs

**Costs for system:**

Salesforce Foundation donation:

10 administration licenses

100 Portal licenses – these were applied for separately and are not part of the standard offer for not-for-profits

**Salesforce Philosophy:***The Power of Us*

*The Salesforce Foundation was created through our unique 1/1/1 integrated philanthropy model: 1% time, 1% product, and 1% equity. We call this global vision the power of us. More than 4,000 nonprofits including hundreds of educational institutions participate in the Salesforce CRM product donation and discount program.*

***Requirements to make your system work:***

- *Strong executive leadership*
- *A requirement that usage is compulsory*
- *Time spent to get a good understanding of best practices and capabilities (or a good volunteer to help out with install/config).*

**<http://www.salesforcefoundation.org/>**

**Thanks to:**

Jeff Challis - Salesforce guru

Salesforce Foundation