Purpose and scope of this document

The purpose of this document is to provide vendors with a basis to provide solution proposals. Accordingly, this document only provides a high-level view of the scope, requirements, and vision of the Volunteer Management Online Project platform.

This document does not provide detailed requirements, solution architecture or data architecture. These artefacts will be developed in collaboration with the selected vendor (service integrator and/or service provider).

Design Concepts: Objectives of the document include providing potential vendors with an understanding of the...

- Delivery Horizons
- Platform Requirements Framework
- Design Framework and Platform Model
- Illustrative User Journeys

Contents

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1. High-level timeline and milestones
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Section B – Design Concepts

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Part A – Project Context
1. High-level timeline and milestones

The development of a central platform will support the coordination, strategic focus, and transformation of the volunteering sector over the next 10 years. The project will be delivered using iterative and agile design and delivery methodologies – proposed commencement is July 2023.

Human-centred, agile methodology across all facets – prototype, test and assess with real people in real time, iterate/improve
2. Program of Work

Proposals are being sought for workstreams 1. Platform – Horizon 1; 2. Implementation; and 3. Sustainability and continuous improvement. Where one supplier can’t provide the full suite, consortia/partnerships are welcome to apply through joint or separate applications.

Outcomes

The funding agreement between the Australian Government and Volunteering Australia sets out the expected outcomes to be achieved from the funding provided:

“The Volunteer Management Activity – Volunteer Management Online Project will provide a nationally consistent, online approach to volunteer recruitment and management.

This includes providing online tools, training and resources to build capacity and capability of volunteer involving organisations to increase the numbers, retention and diversity of volunteers across Australia and build the capacity of those organisations to successfully recruit and retain volunteers through an online mechanism.

The intended outcomes of the grant opportunity are that volunteer involving organisations (VIOs) and volunteers have easy access to online volunteer management tools, training and resources that are nationally consistent and contribute to:

• an increase in the number of community members participating in volunteering;
• increased capacity of VIOs to recruit, train and manage volunteers online;
• increased quality and standards of volunteer management practices;
• increased numbers of community members engaged in volunteering;
• increased retention of volunteers by VIOs;
• an increase in the diversity of volunteers across Australia; and
• reduced duplications across state and territory jurisdictions of volunteer management tools, training and resources (including volunteer recruitment/contact points).”

Workstreams

1. Platform – Horizon 1

Deliver a single digital entry point, which consolidates relevant existing online services, to enable access to nationally consistent volunteer management tools, training and resources that are easy for volunteer organisations and volunteers to find and use. See next page for Horizons.

2. Implementation

Design and deliver an implementation plan for effective and supported roll-out of the platform and new approach. This would include policies, processes, communications, training and other change tactics to enable effective participation across the volunteering ecosystem.

3. Sustainability and continuous improvement

Define a sustainable business model, embed a process of iterative platform improvements, and report on the short and long-term ability of the platform to support the National Strategy for Volunteering in achieving stated outcomes.

4. Partnerships and engagement

Implement a collaborative approach to design, delivery, management and ongoing resourcing (people and funds) of the digital infrastructure and online platform between Volunteering Australia, state and territory volunteering peak bodies, a technology partner and other skilled groups as needed.

5. Project management

Establish program governance and management to oversee all associated digital projects from planning and expert advice through to decision-making and reporting.

Mandatory for this Request for Proposal

To ensure breadth of capability to implement the full project, consortia / partnerships are welcome to apply through joint or separate applications.
3. Delivery Horizons

The delivery horizons provide a view of how the capability can be matured overtime to achieve the 2033 strategic vision. Note: Horizon 1 is focused on foundational development – final scope and schedule will be co-developed with the selected delivery partner.

**Delivery Approach**

The full vision of the platform will be delivered across three horizons.

While Horizon 1 establishes the foundations of the platform – it is through Horizons 2 and 3 that the platform capabilities will deliver value and outcomes for the sector through the transformation and standardisation of practice across the sector.

Horizon 1 provides a proposed scope for delivery – the scope, service offerings, delivery, and design activities will be validated, refined, and reconsidered in the delivery phases of the project.

**IMPORTANT NOTE**

THIS PROCUREMENT LOOKS AT DELIVERING HORIZON 1 ONLY. HORIZONS 2 AND 3 ARE NOT CURRENTLY FUNDED.

**Agile Delivery**

Within each horizon, there will be multiple agile delivery phases focused on rapid deployment, discovery, and user assurance activities.

The project team in collaboration with vendors and stakeholders will develop the agile methodology, including:

- Sprint planning
- Backlog development and prioritisation
- Epic and User Story Development

**Minimum Viable Product – Current Focus...**

<table>
<thead>
<tr>
<th>HORIZON 1</th>
<th>Build the platform foundations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Digital Presence</strong></td>
<td>Modernise the UI to be consistent in presentation and function across national and state jurisdictions. In doing so provide a single digital front door – piloting of primary service offerings.</td>
</tr>
<tr>
<td><strong>Common National Digital Experience</strong></td>
<td></td>
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<tr>
<td>Digital Front Door</td>
<td>eMarketplace (Pilot)</td>
</tr>
<tr>
<td>Learning Management Services (Pilot)</td>
<td>Volunteering Management Services (Pilot)</td>
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<tr>
<td>Platform Design and Configuration</td>
<td>Data Management Services</td>
</tr>
<tr>
<td>Service Management</td>
<td>Passport and Identity Framework</td>
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<tr>
<td>Business process for self service</td>
<td>Establish service level agreements</td>
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<tr>
<td>User Experience Design</td>
<td>Information Architecture</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HORIZON 2</th>
<th>Define and build the national infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DX Platform</strong></td>
<td>Incorporating SDD, extend to include a common marketplace – providing preferred/endorsed technology and service options. Dependence on agreed protocols and standards.</td>
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<tr>
<td><strong>Composable Digital Services</strong></td>
<td></td>
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<tr>
<td>Volunteer Passport</td>
<td>Volunteer Marketplace</td>
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<tr>
<td>Virtual Matching Service</td>
<td>Predictive Campaign Management</td>
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<tr>
<td>Advance Data Analytics (forecast and simulate)</td>
<td>TBA</td>
</tr>
<tr>
<td>Digital (API) Gateway</td>
<td>TBA</td>
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<tr>
<td>Collaborative and campaign tools</td>
<td>Permissions and Consent Framework</td>
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<tr>
<td>Linked credentialing services</td>
<td>Service Mining</td>
</tr>
<tr>
<td>Define preferred technology suite</td>
<td>Define integration strategy</td>
</tr>
<tr>
<td>Define business rules and criteria</td>
<td>Service Ecosystem Architecture</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HORIZON 3</th>
<th>Operate as a connected service-ecosystem</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Virtualised Service-Ecosystem</strong></td>
<td>Apps and digitally mobile providers connect on a need’s basis for social impact. Service outcomes driven by smart services that are platform-less and unbounded. Data-driven services with gateway connections to key stakeholders (e.g., emergency services, social and economic forecasting)</td>
</tr>
<tr>
<td><strong>Virtualised Smart Services</strong></td>
<td></td>
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<tr>
<td>TBA</td>
<td>TBA</td>
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</tbody>
</table>

**Delivery Platform Design and Configuration**

- Data Management Services
- Platform Services
- TBA

**Design Activities**

- Business process for self service
- Establish service level agreements
- Marketplace registration criteria
- TBA

**Service Offerings**

- Digital Front Door
- eMarketplace (Pilot)
- Digital Passport Services (Pilot)
- TBA

**Scope Description**

- Digital Enhancement
- Digital Transformation

**Minimum Viable Product – Current Focus...**

Iterative/agile delivery to accelerate controlled and continuous development

Draft backlog Draft backlog Draft backlog

3 April 2023
Part B – Design Concepts
The design concepts have been developed through collaboration and partnership between Volunteering Australia and AKAD Consulting with support and guidance from the Volunteer Management Online Project Expert IT Advisory Committee.

Who and how we have consulted
Consultation has been conducted through a range of methods, including:

- Volunteering Australia CEO and Executive
- State and Territory Volunteering Peak Bodies and Volunteer Involving Organisations (VIOs)
- National Strategy for Volunteering (2033 Vision)
- Discovery Insights Report - Co-designing the National Strategy for Volunteering
- Early Design Stories Report
- Volunteer Management Online Project Market Place Report
4. Design Framework

The aim of the design framework provides a summary of the high-level architecture concepts that have been developed to guide the early phases of the project to develop the platform foundations.

Key element of the design include:

Strategic Context
1. Social and Community Impact: primary objective of organised volunteering.
2. Volunteer Management Online Project: provides the foundations for ecosystem transformation over the next ten years.
3. Delivery Horizons: high level phases of platform maturity and development.

Design Concepts
4. Design Framework: provides the holistic canvas aligning the primary key design concepts.
5. Platform Composition/Role: outlines the composition to drive coordination and consistency across the ecosystem.
6. Platform Capabilities: provides the core capabilities required by the platform to deliver outcomes.
7. Platform Sustainability Principles: provides the guiding principles to ensure the design and operating approach is sustainable.
8. Volunteering Service Ecosystem Requirements Framework: provides the core value chain and high-level requirements of the platform.
9. Volunteering Service Ecosystem – Level 1 Domains: details the primary domains, sub-domains, and solution categories identified across the service-ecosystem.

Note: the current project covers ‘Horizon 1’ only – the canvas represents the matured framework as it progresses through horizons 2 and 3.
5. Volunteering Service-Ecosystem Platform

The concept of developing a single digital entry point is targeted at supporting a coordinated and consistent approach to volunteering management across Australia.

DRAFT PLATFORM VISION

The purpose of the platform is to enable the Australian volunteering sector to operate as a connected service ecosystem.

Volunteering Australia’s role as an ecosystem steward is to enable volunteer involving organisations to:

- Coordinate and scale volunteering activities of social importance.
- Provide a marketplace to access endorsed resources and services.
- Provide the digital foundations for volunteering to be mobile in the ecosystem.
- Support the ongoing transformation and modernisation of the sector.

PLATFORM COMPOSITION CONCEPT

A platform can take many forms, but at its most basic, it’s the enduring ability to configure and connect digital services for a common business purpose.

Platform Composition and Concept

The multi-sided platform would consume and expose services. The platform is a host for a range of digital service offerings to aid volunteer involving organisations – primary services could include:

- Information repositories (guides and standards)
- Credentialing/identity services
- Preferred (endorsed) technologies and services (digital marketplace)
- Volunteering and learning management services.
6. Platform and Service Architecture Sustainability Principles

The architecture principles provide the gold standard for the selection of services which will be hosted or accessible via the platform. This will support achieving outcomes that are sustainable, secure, low touch and adaptive to emerging social need and impact.

Future Proofing and Risk Mitigation

The purpose of the sustainability principles is to future-proof the platform by providing guidance on achieving design excellence and to mitigate against critical technology and project risks - these including:

- Ensuring that Volunteering Australia isn’t required to provide technical expertise and budget to maintain and innovate technology products. (1)
- Avoiding complexity by mitigating against the need to create, manage, and retire legacy solutions (1 and 3)
- Assurance that technologies and data are cyber-secure with clear controls and protocols. (3 and 5)
- Ensuring that solution and design evolve according to volunteer user and sector needs – leveraging a rapidly evolving market. (3 and 5)
- Ensuring and promoting solutions that have established APIs and interoperability protocols to reduce fragmentation (4)
- Ensuring that the platform is not limited and constrained by propriety standards and protocols. (3 and 5)

1. Evergreen Managed Services (PaaS/SaaS)
   Evergreen platform and software products are sourced as managed products/packages.
   Applying this principle assures:
   - Currency, support, and security of software and technology assets
   - Provision of ongoing technology asset lifecycle management
   - Minimisation of critical technology risks (e.g., support, vulnerability, and performance management)

2. User Centric and Naturally Connected
   Services designed, exposed, and consumed in a user/customer-centric context.
   Applying this principle assures:
   - User centric role based design (e.g. provider, volunteer)
   - Ability to expose and link services to user contexts (e.g., credential services for VIOs)
   - Design and process reflect the voice of the customer.

3. Adaptive and Dynamic Capabilities
   Ability for the platform and service offerings to be adaptive to provide emerging fit-for-purpose services.
   Applying this principle assures that:
   - As new volunteering sector technologies and services emerge – these can be exposed on the platform
   - The sector won’t be bound to old technologies or legacy

4. Composable (modular and interoperable)
   Services are composable to provide connected experiences and service outcomes.
   Applying this principle assures:
   - Ability to bundle services and technology across the ecosystem (e.g. Passports to learning management to volunteer management services)
   - Services can be (re)composed by being discoverable, modular, autonomous and orchestrated
   - Continuous improvement and adaption (to best of breed) services.

5. Federated
   No one size fits all – the service ecosystem and platform are composed of a range of diversified solutions and options to provide service outcomes that are representative of the interests in the volunteering ecosystem.
   Applying this principle assures:
   - Services, technologies, architecture will be diversified – not centralised
   - Services will include a broad range of ecosystem providers including state and territory volunteering peak bodies, volunteer involving organisations, and technology/cloud solution vendors

6. (zero)Trust and Secure
   Services and interactions are authenticated, secured, and assured.
   Applying this principle assures:
   - Security is provisioned for users and devices explicit access
   - Leverages permission and consent frameworks to access functions and data
   - Benchmarks for security standards are met
   - Cyber-security capabilities are inherent to SaaS and PaaS offerings

Note: While the principles represent a high level of maturity of platform capability – where, the principle can’t be immediately met, the pathway or roadmap should be addressed.
7. Platform Capabilities
These are the basic capabilities we need the platform to provide to meet the basic requirements and to be able to mature across horizons.

1. Single Digital Presence
   Ability to provide a common point to access and manage content, resources, and information.
   Features include:
   • Access for members to manage content
   • Consolidation of information resources from across the sectors
   • Hosting of e-marketplace, passport access, and other services
   • Role based access for administrators, providers, and volunteers

2. Volunteering Passport (credentialling and identity)
   Ability to enable a volunteer to manage their digital volunteering credentials.
   Features include:
   • Registration and determination process
   • Linking of Digital Identity and other credentials services (e.g. working with children, training and skills)

3. eMarketplace
   Ability to provide a consolidated volunteering sector provider and service marketplace.
   Features include:
   • Registration and linking process
   • Shop front of digital volunteering services for volunteer involving organisations, providers, and volunteers
   • Hosting a range of services categorised by roles and functions
   • Linking of services as a part of passporting

4. Permissions
   Ability to assess, determine, and apply the right for an individual to take actions, undertake specific roles, or manage information.
   Features include:
   • Process linking identity, application and assessment
   • Rules and criteria-based assessments (permission types and eligibility)
   • Applied for peak bodies, volunteer involving organisations, and service providers to undertake specific roles in a volunteer response

5. Work Management
   Ability to configure and re-configure workflow and manage workflow items.
   Features include:
   • Configure work-flow tasks and actions
   • Process optimisation and recommendations on next action
   • Provision of performance data and analytics
   • Work management and prioritisation of tasks (e.g. assessments, on-boarding activities, and platform service management)

6. Collaboration and Knowledge
   Ability to provide messaging, collaboration, and information services across the ecosystem.
   Features include:
   • Services linked through a common passport or provider inbox
   • Virtual collaboration spaces, meetings, and tools

7. Account Management
   Ability to automate the management of accounts, payments, and collections for the provision of volunteer related services and technology.
   Features include:
   • Account management
   • Utilisation of agnostic payment delivery capabilities
   • Compliance and reconciliation functions
   • Linking to permissions, transactions and service capabilities

8. Trusted and Secure
   Ability to protect systems and information from unauthorised or consented disclosure, theft or damage.
   Features include:
   • Consent framework
   • Identity and access management
   • Cyber and information security
8. Platform Requirements Framework

The concept of developing a platform is targeted at supporting a coordinated and consistent approach to volunteer management across Australia.

**Business Requirements**
The volunteering management requirements framework provides the high-level requirements that describe the scope of the platform. In effect, it provides the framework for the development of functional and non-functional requirements to be developed in the later design and delivery phases of the project (by the selected vendor).

R1 – Policy and Guidance:
Repository of endorsed guidelines, regulations, obligations, and best practice.
R2 – Learning Management:
Access to nationally accredited learning and development opportunities.
R3 – Volunteering Services:
Provides active listings of endorsed software or service providers.
R4 – Credential and Authorisation:
Provides a single-entry point or credentialled role-based authorisation across services.
R5 – Service Coordination:
Provides the tools and framework that aligns and coordinates volunteering activity within and across jurisdictions.
R6 – Data and Analytics:
Data and analytics that supports insights on costs, benefits, value, forecasting, and investment.
R7 - Accessibility:
User design that promotes accessibility and inclusion.
R8 – Scalable and Responsive:
Scalable and responsive to a range of business scenarios and roles (e.g. emergency responses).

**Framework Purpose**
The Platform Requirements Framework provides the high-level requirements to describe the broad scope based on the National Strategy for Volunteering, Volunteer Management Online Project Charter and Market Analysis opportunities. The framework describes the end-to-end core process of volunteer management and the supporting requirements. By developing the platform, Volunteering Australia will better be able to provide the coordination, services, and standardisation required to support the National Strategy for Volunteering Focus Areas and Aims of:

1. Individual Potential and the Volunteer Experience
2. Community and Social Impact
3. Conditions for Volunteering to Thrive

Volunteering Australia Management Platform – Requirement Framework

3 April 2023

National Volunteer Management Online Project – Vendor Design Pack
National Volunteer Management Online Project

Enquiries should be addressed to the Procurement Manager via this form