

## Charitylog Training Survey Report

A survey was conducted in May 2021 to identify the Charitylog training and development needs of Age UK brand partner staff. It collected information about the respondents' role, their Charitylog usage, and training areas they were interested in.

In total, 370 individual responses were received from 88 brand partners with most organisations represented by 1-5 staff members. 86% of respondents were regular users of Charitylog, with 7% being infrequent or new users each. The most frequent role types among the staff members were Service Co-ordinator or Manager (118), Case Worker (97), and Administrator (77), while there were a smaller number of Senior Managers (40), Support or Care Workers (27), and Activity Workers (11). The survey offered a selection of 22 different areas of training, with respondent being able to choose any number of these.

Our findings indicate that the training areas to focus on initially should be around reporting, outcomes, as well as letter templates as these were the most popular across all role types. Basic training designed for new users should also be suitable for those who use the system infrequently such as Support or Care Workers. Furthermore, interest in training was correlated with role types, therefore role-specific training should be developed for frontline staff such as Activity and Case Workers, as well as the high number of interested managerial and administrative staff. It is important to note that the setup of Charitylog varies significantly across brand partners, therefore reduced popularity might indicate a less used feature rather than a lack of training need from those who use it.



40% of respondents said they were interested in expanding their skill and knowledge of Charitylog, and a further 30% indicated they lacked confidence or experience in using the database. It is worth noting that those who respond to a survey about training are more likely to be interested in further learning, which might not be representative of all staff members.

The most popular training area across all role types was “General Reporting” with 54% of respondents favouring it. Other key areas of training with over 25% of respondents interested were letter templates (“Letter Templates and Texts”, and “Setting up letter templates”), outcomes (“Entering Outcomes”, and “Setting up Outcomes”), and “Volunteer and Staff management”. Although “Extension Databases for forms and calculations” was also popular at 25%, it was primarily regular and confident users who were interested. Infrequent and new users placed “Data Entry for basic users” while “What is Charitylog” training was not as popular with them. Other less popular areas were concerning operations and IT, such as “Security and User Management”, “Introduction to the API”, and areas around rostering and invoicing. This could potentially be the result of these features not being used in a lot of Charitylog setups.

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**Service Co-ordinator or Manager,  
Senior Manager, Administrator**

These role types were more likely to lack experience or confidence with Charitylog, and they were also more interested in expanding their skill and knowledge. They favoured areas related to reporting (such as “General Reporting”, “Extension Databases for forms and calculations, and “Entering Outcomes”), as opposed to case or event management. Both managerial role types had an interest in “Volunteer and Staff Management”, while Administrators were more focused on operational training areas such as “Client Anonymisation” The least popular training areas such as invoicing and rostering were all chosen almost exclusively by these three role types.

**Case Worker**

The second most common role type, Case Workers were more likely to be interested in training areas relating to case management such as Action List and Case Manager, Extension Databases, and Creating Projects and Templates. Respondents were more likely to be regular and confident users of the system, therefore role-specific training for them can be aimed at a more advanced audience.

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**Activity Worker**

As the least common role type, only 3% of respondents identified as activity workers. Mostly regular users, they had a significant preference for training in the Clubs, Clinics, and Groups function (Using Groups/Clubs, Managing Groups/Clubs and treatments/activities) which is one of the primary ways of recording events on Charitylog.

**Support or Care Worker**

Representing 7% of all responses, this role type was particularly interested in “Data Entry for basic users” and Customising Records training, even though most were regular and confident users. A possible reason for this might be that support or care workers are often away from their computer, which means their use of Charitylog is likely to be less extensive.

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