Agiloft

UGI Utilities, Inc.

Automated Volunteer Management Solution Empowers Literacy

Business Overview

UGI is an energy distribution company with a 130-year history of operating within urban areas. Over 640,000 customers rely on UGI for natural gas and approximately 62,000 locations depend on them for electricity.

For the last twenty-eight years, UGI has invested in their local community through the Reading is Fundamental (RIF) program. Their support of the Pennsylvania public school system has resulted in more than 1.2 million books gifted and the ongoing engagement of UGI employees as active RIF volunteers.

Challenges

UGI's involvement with the RIF program dates back to 1991. It's a defining element of their corporate culture and for many years it required a full-time employee to ensure that it ran smoothly. When that long-time team member announced her retirement, UGI had to decide whether to replace the position or automate this important function.

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The retiring employee owned several detailed and specific tasks related to the management of the program and its 175 supported schools. Her responsibilities included tracking an event's minimum and maximum number of volunteers, coordinating with the school staff, timely reminders, handling last-minute volunteer cancellations, and recording RIF volunteer hours. She also managed the use of a "Reading Wizard" costume, ensuring that no more than one costume was allocated per day per region. To replace these tasks with a system would require a highly customized solution with the awareness and intelligence of an experienced employee.

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Challenges
- No available volunteer program management application fulfilled company needs for an easy-to-use solution
- An experienced employee responsible for coordination retired, and the company wanted to transfer the manual functions to an automated solution
- Needed to manage a mix of internal and external users, all with diverse requirements

Agiloft Benefits
- Highly adaptable system captures the unique elements of event scheduling, volunteer coordination, notifications, and reporting
- Employee volunteers and school staff successfully self-manage the program through automation
- Advanced search feature and special filters meet unique requirements to efficiently coordinate events using a shared 'Reading Wizard' costume
- Configured calendar gives employees and school coordinators greater visibility into upcoming events so volunteers come prepared and coordinators plan their time more effectively

Beyond functionality, the system also needed to appeal to the diverse group of users involved in the program. School coordinators (outside of the UGI organization) needed to be able to log in independently and schedule their RIF events. That information then needed to be shared with UGI employees who could access the same system, review available dates, and then sign up. UGI required a platform that could serve the interests of those both in and outside their organization and do so seamlessly for those accustomed to working with a familiar point of contact.

The Search

"We were already using Agiloft for other aspects of our operations," UGI BI Analytics team member Julie Bealer said. "We did look at a few other systems—they were calendar applications because we couldn't find anything specific for volunteers. Based on our experience with Agiloft and what the other vendors offered, it seemed an easy choice. It came down to the ease-of-use and the ability to let someone outside the company create events. In the other systems you could create the events but then it was cumbersome for people to try and sign up."

The Project

UGI started with the standard platform and worked with Agiloft's VP of Professional Services Bridget Conrad to customize it to their specific requirements. This included escalating rules tailored to their protocols and the automation of background processes.

The school coordinators begin by accessing a user-friendly portal and selecting the dates of their planned events—the system limits them to three per year. They can also update information for their principal and other school contacts on record in the volunteer program without intervention from an administrator. From UGI's side, new employees automatically receive an Agiloft profile—supported by integration with Active Directory—from which they can search and filter by region, district, and schools to find the right event for them. The system then manages the RIF events to ensure there are

more than the minimum and less than the maximum number of volunteers and that the designated volunteers receive notifications and reminders. UGI employees can view how many children are planning to participate and mark an event as attended, while administrators can track the number of volunteer hours spent.

"It's been a very good experience," Julie said. "I was involved in designing and helping to create our Agiloft system, so I was very familiar with it once we implemented it."

Another unique element of UGI's RIF program included the management of a "Reading Wizard" costume to entertain and engage the children at the events. To maintain the integrity of the character, RIF does not allow more than one wizard per event on the same day in the same region nor can schools host the mascot more than once a year. Despite these restrictions, any of the UGI employee volunteers could elect to be the wizard. "We were able to support the unique demands of the costume through a strong search capability with

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special filter types to prevent potential scheduling conflicts," Bridget explained. "Once the costume was reserved for one event in an area, it did not appear for selection to any other events in that region on that day."

With the RIF program successfully managed by the Agiloft solution, Julie and her team have considered extending it to the company's other philanthropic efforts, such as their Meals on Wheels program.

Solution Benefits

"There was certainly a financial return on our Agiloft investment because we didn't have to replace the person

who retired," Julie said. "And it's very easy for me to just go in at the start of each year and reset it for next year's calendar."

Through that calendar, employees and school coordinators can have greater visibility into the program and its upcoming events. They can view the number of children attending and come prepared with the supplies needed for each to feel included. Coordinators and volunteers can plan out their time more effectively and help develop the program in the way that works best for them.

At the end of each month, Julie and her team access the reporting features within Agiloft and share the latest program statistics to celebrate and encourage those who dedicate their time and talents to its success. Then, once a year, UGI uses the Agiloft dashboards to review the annual volunteer hours, automatically tracked within the system, to further celebrate every employee who volunteered during the year. Recognizing the benefit of Agiloft within their business operations, UGI realized they could achieve the same efficiency in their community outreach. By selecting a user-friendly and versatile system that was easy to customize to their specific requirements, UGI has ensured the success of the program and its participants. With the Agiloft solution in place, UGI's pledge to support their local public schools will stand firm for decades to come.

Let Us Show You

What Agiloft has done for UGI, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

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