



## Choosing a Volunteer Management Software Solution

The right Volunteer Management Software can elevate your team to a higher level of excellence and mission achievement. Just as there is software specifically designed for accountants, project managers, sales and marketing teams, solutions also exist for Volunteer Engagement Professionals.

Volunteer management commonly begins with a spreadsheet, but as volunteer numbers grow this method becomes cumbersome, takes up time and becomes less effective.

Some common issues include:

- High volume of data entry
- Duplication of data
- Lengthy reporting process
- Errors in data integrity and data inaccuracies
- More time spent inputting numbers and less time engaging with volunteers
- Volunteers start to disengage
- Data security concerns.

The first step in choosing a Volunteer Management Software (VMS) solution is determining what tool is currently in use. This may be as simple as a spreadsheet, it may be some form of VMS software, or it may be something else entirely.

### The Importance of the Right VMS

A huge number of employees experience frustrations at work due to inadequate software tools. The right software programme should become a one-stop-shop, allowing you to perform all the necessary functions of your role.

For Volunteer-Engaging Professionals (VEP), this includes:

- Recruiting and screening potential volunteers
- Training and on-boarding new volunteers
- Scheduling volunteer hours
- Communicating directly with volunteers
- Logging volunteer hours
- Reporting on volunteer hours

- Tracking and recording volunteer data
- and more!

For volunteers, the right software tool allows them to:

- Apply for a volunteer role
- Receive and send communications
- Sign on for vacancies
- Manage their own volunteer schedule
- Update their profile information
- Log their volunteer hours
- Report on their contribution.

A modern VMS allows you to do all of these things, so it is important to consider—what elements are most important to you?

### The Benefits of the Right VMS

- Better use of your (and volunteers') time
- Easier and more accurate reporting
- Improved communications
- Better stakeholder engagement
- Enhanced data security and confidentiality
- Improved data integrity
- Better accessibility to data
- Improved visibility of your programme, through the use of modern technology
- Stronger staff morale and retention
- Overall better value for money, as a result of consolidating multiple systems into one.



## Identifying the Need for Change

Some common misconceptions that can prevent positive change include:

- We can't afford good software
- We already use so many tools and don't need another one
- Using software will take away from the personal touch
- Spreadsheets are free and don't cost us anything
- My volunteers don't use technology - don't let the minority determine the final decision
- It's too much work to make the change.

It is easy to fall into the cycle of being too busy as a result of not having a good tool, then seeing the need for a good tool but being too busy to investigate and implement it!

The process of change begins with taking a moment to consider your current state versus your desired state—what do you currently have, and what would you like to have?

Start by defining what you want or need from a VMS. Think outside the square, but at the same time set realistic goals. Remember, not all VMS are going to be the best fit for each need.

## Making a Case for Change

Often the biggest challenge is convincing other people within your organisation that a change needs to be made.

In making a case for change, it is important to identify the key issues your organisation is facing, and which of these are deal breakers. It can be useful to create a table that lays out the key problems, which people or departments these problems affect, and the consequences of these problems should they remain unresolved.

For each identified problem, focus on how that issue affects not just the volunteer service but the organisation as a whole. For example, data security and privacy affects everyone within an organisation and is difficult to ignore.

## Forming a Project Team

The proposed solution is for the organisation's leadership to grant permission to form a dedicated project team who will explore VMS solutions to help solve these problems.

As a team, you will need to set your goal/s and find allies to support you on this journey. The best solutions come out of organisations where there is a variety of experience around the table. Consider including the following people:

- A member of Board of Directors
- The Volunteer Coordinator/Manager
- An Executive Director
- IT support person
- A Consultant or Project Manager
- Volunteers

## Vendor Assessment

The next step is to consider who from the sector might make a suitable tech partner. There are a number of vendors out there so it is wise to consider the following:

- Credibility—how long have they been in business?
- What history do they have?
- Longevity—are they likely to be there in the long-term?
- What are their privacy and security settings?
- How is data encrypted?
- What ongoing support will be available?
- What online help resources do they offer?



- Where is the business located and is there local support?
- How responsive are they likely to be?
- Are responses part of the annual fee or will you pay extra for help requests?
- Is the system easy to use, for both volunteer leaders and volunteers?
- Is there an app? If so, what does it allow volunteers to do?
- Does the system accommodate e-learning?
- How customisable is the system?
- Can you use it for saving important documentation such as agreements, consent forms, etc?
- What is the pricing structure?
- How many administrators can you have for the price? What does it cost to add more?
- Does the system have scalability—will it grow as your volunteer programme grows? Does that impact the pricing?
- Must have (M): this need is mandatory. Immediately disqualify a vendor if their VMS does not meet this need.
- Should have (S): this need is important, adds value and should be found. If not found, it does not automatically disqualify a VMS.
- Nice to have (N): This need is a bonus if found. It has little impact if left out.

Need	Priority (M, S, N)	Vendor 1	Vendor 2	Vendor 3

There are a number of tools available which provide reviews and comparisons across different VMS. These include:

- [www.volunteersoftwarecomparisons.com](http://www.volunteersoftwarecomparisons.com)
- [www.capterra.co.nz/directory/10044/volunteer-management/software](http://www.capterra.co.nz/directory/10044/volunteer-management/software)
- [www.g2.com/categories/volunteer-management](http://www.g2.com/categories/volunteer-management)
- [www.doublethedonation.com/volunteer-management-tools/](http://www.doublethedonation.com/volunteer-management-tools/)

## Vendor Analysis

A Vendor Analysis enables you to compare how each vendor meets your identified needs. In this step it is necessary to prioritise your needs as Must Haves, Should Haves and Nice to Haves:

## Identifying the Right VMS

Identifying the right VMS for your organisation is a journey. Allow plenty of time to make sound, well thought-out decisions and reach the best outcome.

There are four necessary Decision-Making Stages to undertake in this process. Allow two to four months to complete the process.

### Determine the possible contenders

This stage involves bringing together your project team, and listing your needs. Each need should be prioritised as a Must Have, a Should Have or a Nice to Have. Compile a Needs Assessment and review this to come up with an initial shortlist.

This stage should take two—four weeks.

### 2. Get a Demonstration

This is your opportunity to get a good look at a system, and find out how it works. Think about if it's easy to use and intuitive. Don't be afraid to get different members of the project team involved, to ask questions, or to go back for a second look.

Allow approximately two weeks for this stage.



### 3. Trial the Software

Only sign up for a trial when you are ready and have time to test it out thoroughly. Involve your volunteers in the trial, allow them to test the volunteer application process and provide their feedback and questions —their experience may be difference from yours.

Be sure to go back to the vendor with questions or to seek clarification as many times as necessary (this will also give you an indication of how responsive they will be future queries).

If you undertake a demonstration and don't feel it is right for your organisation, don't feel trapped. Just let the vendor know that it's not for you.

Following the trials, you should now be ready to compile a final shortlist. Limit this to two VMS and focus primarily on their usability and support requirements (particularly the Must Haves).

Allow four weeks for the trialling process.

### 4. Subscribe

Once you have planned, prepared and then carried out your plan you will be in a position to choose wisely and with confidence.

Your Project Team Leader, along with the Executive Director and/or Board Member should recommend your chosen solution to leadership.

Allow up to a month to complete the approval and subscription process.