ACTION IT.

Volunteer Management Systems for NGOs

FINDINGS REPORT ·ACTION IT 2021-S2

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Executive Summary

Every successful volunteer program begins with a well-planned volunteer management process. A volunteer management process ensures that your organisation or event operates efficiently, saves time and resources while ensuring volunteer retention. This guide will help you analyse the available options and determine the best Volunteer Management System (VMS) available in the market.

We have identified the requirements for an efficient volunteering management system by conducting interviews with various volunteering organisations, ranging from small organisations with about 20 volunteers to large-scale global organisations based in multiple countries. A total of eight interviews were conducted. Based on the interviews and analysis of the available solutions, we have concluded that VMS suitability mainly depends on the organisation's type and scale. Hence, organisations can be classified into three different categories based on the scale of organisation and requirements. This defines the suggested solution. A decision tree is also included in the report, which will help the organisation select any solution based on needs.

In addition to the decision tree, a scoring matrix is also included with the report. In the scoring matrix, different features required for a VMS have been categorised and listed. Then for each solution, a score is assigned for each feature. Users can refer to this scoring matrix to get help on deciding a solution.

Note this report offers a general overview and evaluation of available volunteering management solutions. Data and information collected may vary over time and can be subjective. Clients are advised to use the recommendations as one of the many references available. Implementation decisions should be made after clients' own evaluation based on specific environments and requirements.

Features of Volunteer Management

Technology is shaping the way that volunteers can be managed by NGOs. It's no wonder that non-profits are always in search of the latest and smart software that helps track the volunteers and their impact. Fortunately, there is a variety of software available for Volunteer Management, each with a range of features. But have you thought about what features would be most useful for Volunteer Management?

A volunteer management system can have a range of simple to complex functionalities based on the requirement of organizations. Some of the key features of a volunteer management system are as follows:

- A simple record of volunteer details. This can include records of volunteer details like name, skills, availability, location, gender, age, interests, ability to work from home, etc.
- Sign up facility for volunteers. This can be implemented in different ways
  - Manual registration. Volunteers can contact administrators through email or by calling. Administrators will then enter the details manually into the database.
  - Organizations can publish registration forms through the mail or publishing registration links through various social media sources.
  - Portal for volunteers. Volunteers can directly visit the organizations portal and register to the organization
- Publishing volunteering opportunities.
  - For very small organizations, this can be done by manually contacting volunteers based on the records in the database.
  - Using systems like Zoho creator, administrators can selectively publish opportunities to selected volunteers based on skill or other factors.
  - Dashboard for volunteers in which all volunteering opportunities can be published.
- Rostering of volunteers to opportunities: Volunteers need to be rostered to opportunities suitable for them. For small organizations, this can be done manually but for wider organizations, it needs to be facilitated with minimum administration overhead.
- Record of volunteer contributions: Volunteers might spend hours involved in various activities. Both administrators and volunteers should be able to track the hours spent by volunteers.
- Reward mechanism in form of certificates: Volunteers should be able to receive some sort of certificate as a form of acknowledgment for their contributions.
- Reporting tools. Reports to cover various organization needs lik .Internal report to track contribution by various volunteers, their involvement, and other general data. External reports

for advisory boards, funding organizations, or for publishing to the general public.

- Ability to store documents. Support documents like volunteers rostering information, volunteering opportunities available, etc.
- Onboarding process. Onboarding of volunteers to an organization requires various induction and training processes. If these are integrated into a single platform, it will make the working of the organization more efficient
- Ability to integrate to existing CRM or other systems. Some organizations might already have a simple CRM or database to manage volunteers, but are not looking for an upgrade. In such a case, the ability for the new system to integrate into the existing system will be very useful.

This section outlines a few must-have features NGOs should look for in an ideal VMS:

1   Volunteer Skill Match

- By understanding more about the volunteers, You'll be able to target messaging and provide a better-personalised user experience for each individual if you learn more about your volunteers, such as the causes they support and the skills they can contribute.
- An effective skill match of the volunteers with the available opportunities helps the work done more efficiently.

2   Web-based Volunteer Management

- The advantage of technology can be imputed into the traditional VMS to transform into a smart system.
- Web-based technologies can help volunteers and NGOs from anywhere and everywhere.
- Having a centralised platform can help
- Here we have listed a few important software capabilities to consider:
  - ▸ Bag of Opportunities: Clean interface to list the available opportunities. Scheduling is simplified when volunteers can sign up themselves for the opportunities.
  - ▸ Volunteer Database: Data is fuel to any VMS. Therefore, a dedicated database for storing and maintaining the volunteers is required based on the scale of NGOs.
  - ▸ Volunteer Event Management: NGOs may oversee multiple events and programs with various organisations across multiple locations. So, a centralised system must be able to manage these events from anywhere.
  - ▸ Data Tracking: A log on the volunteer work hour can be calculated so that NGOs can view the effectiveness of the volunteer work via visualisations.

3 **Centralised Communication Hub**

- Communication is an important aspect to maintain real connections with the volunteers.
- Software with a Customer Relationship Manager (CRM) would be the most effective and efficient to send emails, texts to volunteers regarding any volunteer opportunities available.
- This way, it can reduce the purchase of a separate CRM to manage and schedule volunteers.
- Here we have listed some additional features that can be considered,
  - ▸ **Automated Communication**: When volunteers register for a volunteer opportunity, the system can automatically "Thank" the volunteer for registering.
  - ▸ **Group SMS:** If you need to communicate with a group of volunteers regarding a particular event, this service comes as a handy tool.
  - ▸ **Mobile Notifications**: This is an additional feature with a centralised mobile app that notifies volunteers of any new volunteer opportunity popping out.
  - ▸ **Social Media**: Like Facebook and Instagram that help people connect and socialise, VMS can also integrate professional social networking media, where like-minded volunteers can get in touch and share things.

4 **Online Background Checks for Efficiency**

- Background checks for VMS are essential to help create a safer environment inside the NGOs.
- Implementing/integrating background checks can be more productive while creating a better experience for the volunteers.
- When the volunteers register for an opportunity through the VMS, they can be directed to finish an automatic background check.
- These background checks can also be attached to the profile of each volunteer so that they can view and manage them efficiently.

Transforming from Small scale to Medium Scale NGOs, the Volunteer management software can replace your Excel sheets/spreadsheets. The volunteer management software must unite all aspects of the volunteer program, from engagement to management. You can ensure that your registration, background checks, and communication systems are all consolidated, organised, and easily accessible with the correct approach in place. These helpful features are meant to streamline your operations and cut down on administrative time so you can focus on the people who help you achieve your goals.

Six Steps for Volunteer Management

This section will help you understand the Volunteer Management Process, where a clear understanding of this can help you choose the right VMS tool required, based on the size of the NGO being focussed into the figure below. We have given a short 6 step summary for better Volunteer Management. Details of the steps is provided here.
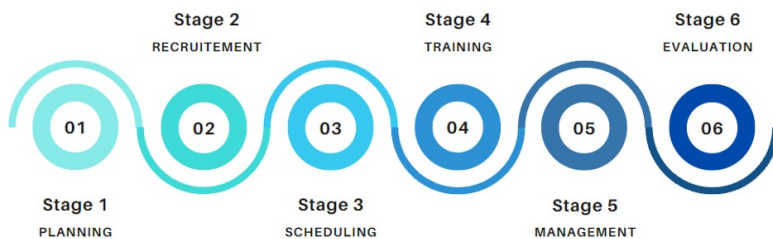

Fig 1. Steps for Volunteer Management Process

The above image is a direct representation of the conversation with some of the volunteers having extensive experience managing large scale volunteering organizations and reflects the six stage process that could help better volunteer management. Each step focuses on an individual aspect of a volunteer management system. Successful application of this Six phase strategy would help build a better Volunteer Management platform.

Interview Findings

In this section, we have provided a few insights and understanding of the interviews conducted for understanding the Volunteer Management System and their needs. Eight Interviews were conducted and we identified various requirements for a volunteer management system. It is summarized below:

- The requirements of a volunteer management system largely differ based on the size of the organization.
- For small-scale organizations (less than 30 volunteers), requirements are simple. Mostly they only need a simple record of all volunteers as task assignment, hour tracking, and other functions happen informally over the call or talk in person.
- Normally small-scale organizations do not have a specialized IT team.
- For medium-scale organizations, the requirements might be a bit more complex. They need something more advanced than a simple database.
- Medium-scale organizations might have few IT resources, but their skill and specializations may not be enough to support entire IT-specific systems.
- For medium scale, in addition to volunteer records they might also need functionalities like:
  - ► Volunteer registration portal: Volunteers should be able to directly register to the organization or events. This will decrease the management overhead on administrators multi-fold.
  - ► Volunteers should be able to view and

register for events: There should be a volunteer portal that can be accessed by volunteers to view all the volunteering opportunities available near them.
  - ► Track hours: System to track hours spent by each volunteer.
  - ► Ability to generate reports.
- For large-scale organizations, an advanced volunteer management system is required. They need advanced data processing.
  - ► Most organizations might have some existing systems. Hence the ability to integrate the existing system into a new one should be provided.
  - ► Organizations might exist in different countries. Hence the system should be compliant with all regional and national policies.

Overview of Shortlisted Solutions

- We first categorise the NOGs into three different categories and provide apt solutions for implementing the VMS.
- Two different categories of solutions can be suggested based on requirements.
- The first one involves a fully paid product that can be directly deployed with minimum or no technical-specific requirements.
- The second category involves solutions that require only a minimum level of technical requirement and provide many customisable options.

Small	Medium	Large
- Less Number of Volunteers (0-50). - Less Number of admins. - Lesser Volunteer Opportunities. - Basic DB structure. - Spreadsheet / Excel software may be sufficient.	- More volunteers compared to small NGO (50-400). - Intermediate admin work needed. - More opportunities. - Dedicated DB structure. - CRM / Web portals. - Manual Communication.	- Large Number of Volunteers. (>400) - Professional Admin work needed. - More vast opportunities. - Advanced DB structure. - Admins, Dashboards, SignUp forms, Automated Response. - Dedicated Organized team for Volunteer Management.

Small NGOs

This category of NGO typically includes less than 50 members. Suggestion if provided in two categories: **Free and Paid**

Free: The products in this category are entirely free, but they involve several manual processes. The product suggested here is **Google Sheets**.

Paid: The products in this category involve a fully paid service that can directly be deployed with minimum or no technical specific requirements. Two products are suggested in this category, **Microsoft Excel** and **Volaby**

Microsoft Excel

It's enough to make one contemplate just using some Excel templates to do the work, and that's not a bad idea. Excel isn't exposed as a project planner in the market, but the software platform is more powerful than most people realise when it comes to tracking. It has a lot of data visualisation tools built and excellent formulas in place for data processing. Check for more information **here**.

Pros

- A free solution for handling less number of volunteers maximum 50.
- Adaptable to suit any requirement.
- All data is available locally and can be accessed by anyone with access to a shared drive where the file is stored.
- Analytical - Excel comes with a wide range of reporting tools, including matrices and charts, and it is easy to create pivot tables and customize data as required.
- Readily Available whenever needed.
- Easy Copy-paste mechanism inclusive.
- Simple to use, as it is universally available.

Cons

- Tough to handle more Volunteers at a time.
- No Data Security.
- No particular Ownership for the Excel files.
- Lack of Mobility.

Google Sheets

Google sheets is a web-based software tool that allows you to organise, edit and analyse different types of data using spreadsheets. It is perfect for a small team that requires collaboration between different team members as it is easily accessible anywhere through an internet browser. Check **here** for more information.

Pros

- Totally free solution.
- Adaptable to suit any requirement.
- All data is available locally and can be accessed by anyone with access to a shared drive where the file is stored.
- Real time Collaboration, two or more admins can work at the same time.
- Very simple and easy interface.
- Creating charts, visualization and integrating with google slides for presentation and reports.
- Easy Copy-paste mechanism inclusive.
- Simple to use, as it is universally available.

Cons

- No Desktop software available.
- It's a cloud based environment so it requires the Internet to open and work with these files.
- No Data Security.
- No particular Ownership for the Excel files.
- Lack of Mobility.
- Few issues in downloading the content in personal software.

Volaby

Volaby is a solution apt for small-scale organizations (<100 volunteers). It does not require any IT specialist to operate and has excellent customer support. It also does cover all features required for an advanced volunteer management system. It has a volunteer portal integrated, various reporting tools integrated and so on. Check **here** for more information.

Pros

- An economical option, considering if volunteer count is less than 100
- Minimum technical expertise required to manage
- Volunteer portal present for volunteers to register, view and register to available opportunities, etc.
- Facility to publish news and opportunities to volunteers
- Excellent customer support

Cons

- Expensive when the number of volunteers to manage is more than 100
- No mobile application

Medium NGOs

This type of NGO typically includes 50 – 400 volunteers. The products suggested are **VolunteerHub** and **Zoho Creator**.

Zoho Creator

Zoho Creator is suitable for a small or medium scale organization which requires customisation. It can be run with a minimum level of IT knowledge. It is a cloud based software to create custom applications on your own, without any prior coding experience or IT expertise. Be it storing contacts, or managing an extensive inventory, or just about any other data-intensive action, you need not search for the exclusive app in the market that may not offer exactly what you want or may come with extraneous features which you would rather ignore. Instead you can build a neatly tailored application on your own using Zoho Creator, to get just what you want.

Pros

- Easy to setup and use with minimum technical skill requirement.
- Ability to easily migrate to from simple systems like spreadsheets.
- Has a function to publish volunteering opportunities.
- Free simple version available

Cons

- Not suitable for very large organizations

Volunteer Hub

Volunteer hub is a suggested solution for large volunteering organizations (>100 volunteers), with no or minimum IT specialization. It also does cover all functionalities required for a large-scale volunteering organization. It is simple, secure and cost effective Volunteer Management Software.

Pros

- Ability to integrate with existing CRM systems.
- Volunteer portal present for volunteers to register, view and register to available opportunities, etc.
- Facility to publish news and opportunities to volunteers
- Has a mobile kiosk application.
- Ability to enter and record personal volunteering hours.

Cons

- Expensive option for the smaller organization (<100 volunteers)

Large NGOs

The Large scale NGO is typically a high end NGO, where there are more volunteers to be managed. Products suggested are **Init Live Volunteer Management Software**, **Sign Up Genius**, and **Volunteer Impact**.

InitLive

InitLive is a Certified B Corporation dedicated to helping organisations manage and empower more volunteers in less time through its all-in-one staff and volunteer management solution. InitLive's all-in-one solution offers organisations efficient volunteer sign-up, onboarding, scheduling, management, communications, and reporting through web and native mobile apps. Click **here** to view more about the services offered and video implementations.

Pros

- Volunteers can directly signup in portal
- Drag and drop schedule building
- Roster mode to automatically match volunteer shits to available opportunities
- Mobile app Present

Cons

- The software is not well-suited for scheduling tasks that require numerous detailed changes.

Sign Up Genius

Sign Up Genius coordinates events and volunteers in minutes with online sign-ups. The site replaces the need for reply-all emails and spreadsheets and saves organisers time by automating the recruiting and coordinating process. The site has features such as automatic email reminders, additional admin access, and slot locking. Sign Up Genius simplifies event planning and scales from a basic sign-up tool to a robust enterprise platform. Click **here** to see how to create a custom dashboard using the Sign Up Genius.

Pros

- Easy signup process
- Automatic email and text remainders
- Volunteer hours reports for easy tracking and exports
- Interface suitable for quick recruitment and action.

Cons

- The templates that are available (particularly for the free version) are visually clunky and dated-looking, with minimal options available for customization.
- It can be challenging to try and figure out exactly what type of sign-up might work best for your needs--you may need to edit your choices a couple of times.
- The "share" URLs for signups are long and clunky. No option to shorten them in-platform

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Better Impact

Better Impact is a volunteer management software designed for businesses and non-profit organisations that hold events and seminars frequently. It lets you manage all your volunteers, making your campaigns more effective and impactful towards the people you serve. Better Impact is a VMS that helps small to large non-profit organisations streamline operations related to recruitment, qualification tracking, time recording, schedule creation, report generation, communication, process automation, and volunteer engagement. Click **here** to know more.

Pros

- Mobile app available for volunteers
- Simplified communication with volunteersRobust solutions ranging from simple sign-up form to more robust volunteer management solutions
- Desktop and Tabular Volunteer Portal.
- Free iOS and Android app.

Cons

- Messaging in the software is not user friendly.

Evaluation of Solutions

Based on the <u>*software selection matrix (see heatmap below)*</u>*, the ranking was done for the three different categories of products. An overview of the ranking of solutions is given below. A detailed description is provided* <u>*here*</u>*.*

Small

Among the solutions for small organisations, **Volaby** achieves the highest ranking. It is one product that has all features of an advanced volunteering management system at a lower cost. It is the best-suited tool for small to medium-sized organisations, which requires volunteers to have a portal to enter their availability, see opportunities, etc. The only issue with Volaby is that it is a bit expensive compared to other solutions in the category. If a user is looking for a cheaper option with various features, the smart sheet is the one to go. It has various project management features like Gantt chart view, calendar view, Kanban board, etc. If looking for a free option that requires a lot of collaboration, google sheet is one to go to. Finally, an excel sheet is one to go for requirements like data visualisation tools and a good desktop software platform.

Medium

Among the solutions for medium organisations, **Volunteer Hub** leads well ahead of Zoho Creator. The advantage of Volunteer Hub is that it requires zero technical skills to handle. It has excellent customer support and all features required for an advanced VMS. It is very suitable for medium to large-scale organisations. The second-ranked is for the Zoho Creator. The advantage of Zoho Creator is that it is entirely customisable as compared to other solutions. Users can create custom forms and events as per their requirements. Also, they have the option to create a mobile app that can be integrated into the VMS. But it does require a medium level of technical expertise to operate.
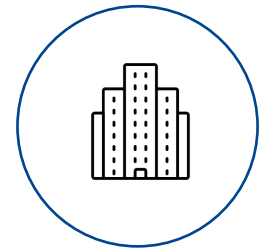
Large

Among the solutions for large-scale organisations, **Better Impact** is given priority over the others because of its user-friendliness, clean design for both admin and volunteer, and top-notch customer support. The Better Impact provides the ability of volunteers to manage their schedule and record their own hours and the ability of volunteers to print their own reports. This solution is followed by the Init Live VMS, which offers an all-in-one staff and volunteer management solution. Init Live streamlines staff and volunteer recruitment, scheduling, management, and communications through web and mobile apps. Our last suggestion is the Sign-Up Genius. This tool coordinates events and volunteers in minutes with online sign-ups. It simplifies event planning and scales from a basic sign-up tool to a powerful enterprise platform without requiring technical expertise.

Decision Tree & Heatmap

The decision tree below offers a quick way for NGOs to select an appropriate solution based on frequent questions and requirements raised. A detailed explanation of the decision tree can be found **here**.
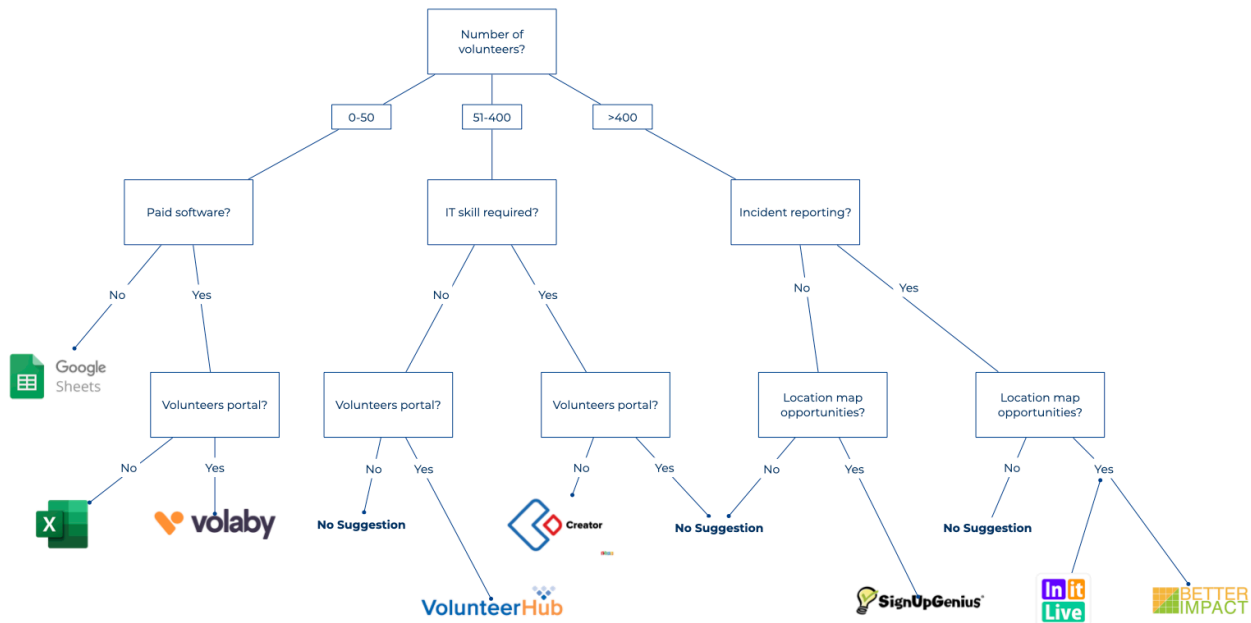

Fig. 2. Decision tree for selecting Volunteer Management Solution

Key Features	Excel	Google Sheet	Smart Sheet	Volaby	Zoho Creator	Volunteer Hub	Init Live VMS	Sign Up Genius	Volunteer Impact
Number of volunteers who can be managed	4	4	5	5	4	4	5	5	5
Technical Expertise required to operate the system (5-No expertise required,0- High skill required)	4	4	3	5	2	5	4	4	4
Portal for volunteers present	0	0	0	3	0	5	5	5	4
Ability to integrate with existing CRM	0	1	4	0	1	4	4	0	3
Reporting tools included	2	2	2	5	1	4	4	3	5
Pricing (0:Expensive - 5:Cheap)	4	5	3	2	2	5	3	5	3
Administrator/ Management									
Ability to vet and approve registered volunteers	0	0	1	5	2	2	4	4	5
Ability to roaster volunteers to oppurtunities	0	0	1	5	2	4	5	5	5
Ability for administrators to publish oppurtunities through the system.	0	0	1	5	2	5	5	5	5
Restricted access to system	2	2	1	5	1	5	3	3	5
Track volunteering hours	2	2	0	5	2	4	5	5	5
Create oppurtunities with Location mapping	0	0	0	5	2	5	4	0	5
Volunteer Engagement									
Volunteers can signup to the volunteering organization through portal	0	0	1	4	1	5	5	4	4
Volunteer portal for volunteers to register directly to interested oppurtunities	0	2	1	5	1	4	5	3	5
Volunteers can directly update their availability	0	0	1	4	0	4	5	0	5
Filter and view volunteering oppurtunities	0	0	1	5	1	5	4	4	4
View all contribution from a volunteer	1	1	0	5	1	4	5	5	5
Ability to track volunteering hours	2	2	0	5	2	4	4	4	5
SMS Remainder facility	0	0	5	5	0	4	5	5	5
Get personal contribution report for volunteers	0	0	5	5	0	5	3	0	5
Communicating with volunteers									
Broadcase email	1	1	1	5	1	5	5	1	5
Selective email to particular volunteer group based on criterias	1	1	1	5	1	3	5	1	5
Incident report	0	0	0	4	0	1	4	0	4
Customer Support									
Email	0	0	1	1	1	1	1	1	1
Phone	0	0	1	1	1	1	1	1	1
Online Ticket submission	0	0	0	1	1	1	1	1	1
Online Forum	0	0	0	1	0	0	1	1	1
Chat	0	0	1	1	1	1	1	0	1
Platform Supported									
Mobile Application	3	3	1	5	3	5	4	4	4
Web application	3	3	5	5	5	0	4	4	4
Desktop software	3	3	0	0	0	5	0	0	0

Table 1: Heatmap for all solutions from 3 different tires

Conclusion

Volunteer administration programming should make your life simpler by offering you every one of the instruments you need to deal with your volunteer program and engage you and your volunteers to accomplish their best work.

Our team has analysed a wide range of solutions in detail, and based on various interviews conducted, requirements were gathered. Then three categories of solutions were identified to which various organisations can be assigned based on different. Different solutions were suggested for different categories.

- **Small organisations**
  - Microsoft Excel
  - Google Sheets [FREE]
  - Volaby
- **Medium organisations**
  - Zoho Creator
  - Volunteer Hub
- **Large organisations**
  - Init Live Volunteer
  - Sign Up Genius
  - Better Impact

Volunteer administration programming should make your life simpler by offering you every one of the instruments you need to deal with your volunteer program and engage you and your volunteers to accomplish their best work.

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ACTION IT.

Action IT is an innovative IT consultancy supporting NGOs with limited resources in delivering sustainable IT projects. We support qualified university student volunteers with the development and the delivery of projects that would have otherwise been impossible in third sector organisations.

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