Choosing an Efficient and Effective Online Volunteer Management System
by Florence May from Indianapolis, Indiana and Tammy Parent from Ottawa, ON

"What do you seek in an online volunteer management system?" is the first question in our fact-finding meeting with potential clients. The leadership's response typically includes elements of the following response: we are seeking a product that enhances our brand, integrity, efficiency, partnerships and relationships with our volunteers.

Our follow-up session is with the manager of volunteers. This person is responsible for one of the organization's most valuable assets: the relationship with the volunteer team. The discussions with the managers of volunteers tend to be less aspirational and more focused on the following challenges:

- "My boss doesn't understand how much time it takes to recruit, register, schedule, coordinate, train and manage our volunteers."
- "We have a system but it wasn't designed for volunteer management.
  It was the least expensive option."
- "We need the volunteer management tools to do the work efficiently and effectively."

Managers of volunteers want to do their jobs efficiently with tools they can operate effectively. They want the organization to look good in the process and also want to look professional. The reality is that it is difficult to ascertain the differences in the numerous options on the market today. The promotions for products sound very similar.

The following article will help your organization differentiate and enhance your brand, integrity, efficiency, partnerships and relationships with your volunteers while using your financial and personnel resources appropriately.

The technical playing field
Five years ago there were a dozen online volunteer management systems in North America.

Today every technical service provider claims to have registration and volunteer management options. Your database provider, your e-mail provider, your ticket system provider and many others try to repurpose their existing software to force a volunteer management solution. They can sell the additional services to you cheap or even provide them for free with your existing contract.

If your organization manages a very small number of volunteers and has limited reporting needs, this solution might work. Unfortunately, decisions are often based simply on price and not on the loftier needs addressed in the opening paragraph: brand, integrity, efficiency, partnerships and

relationships with our volunteers.

The old adage "you get what you pay for" often applies as organizations end up with an online system that:

- frustrates the volunteer as the process does not match the organization's purpose,
- infuriates the manager of volunteers with lack of functionality,
- does not create efficiency for the organization and
- leaves the organization looking weak and disorganized.

The shopping list
Step one: Identify the features and functions needed to be successful. Make a checklist and identify which items are a priority and which are nice to have.

[Sample volunteer management system features and functions list.](#)

Step two: Discuss the system purpose. Note this actually should be step one but most people are more comfortable starting with features & functions.
What type of volunteer management system will support your organization's purpose?

- Ongoing activities. Every day? Set schedule at set location? Same hours? Small number of volunteers daily? (e.g. food bank, hospital)
- Event based. Specific periods of time? Multiple locations? Numerous positions in the same time period? Large numbers of volunteers in shifts? (e.g. championships, endurance, festivals)
- Community hub or recruiting. Need to match volunteers to geographic interest-based requirements.
- Enterprise. Central organization with numerous supporting organizations. (e.g. cause based, Special Olympics).

Step three: Understand what level of account management support is needed.

- Account management. Does the company provide an assigned account representative or a pool of account reps?
- Account services. What services will you need from the account rep? Consultant? Task? Technical? Only tech support? No support?
- Access. How can you access support? Phone? E-mail? Chat? Forum? When is support available (days/hours/holidays)?

Step four: Valuation

- Tasks. Break down the tasks that consume the most time (e.g. recruiting, scheduling, communications, group coordination, check-in, reports, and management).
- Staff time. Do a time study. How much time is your manager of volunteers spending doing administrative tasks manually?
- Program pain points. Determine which tasks are causing the most pain.
- Staff turnover. Is your organization's manager of volunteers position a revolving door?

Step five: Before you sign the contract.

- Operator. Who is going to operate the system? Has this person bought into the selection?
- Demo. Has your manager of volunteers participated in a full-product demonstration?

- Priorities. Understand that no system is going to give you everything you want. But the volunteer management system should be able to handle the majority of your top priorities.
- References. Have you checked references?
- Continuity. If your manager of volunteers leaves the organization will the system continue to provide your organization with the volunteer database, history of activity, activity schedules and templates for the future?

Return on investment
The final question. Is your organization putting a band-aid on your volunteer management needs or investing in the future of your program?

Volunteer management systems should be measured in the broad return on investment (ROI), not just upfront expenditure. Review the guidelines above and consider all costs. The system needs to do more than just functions; it also needs to build your brand, integrity, efficiency, partnerships and relationships with your volunteers.

A few years ago a client told me, "The day we bought this volunteer management system was the best day of my working career. It was a clear message that my organization believes my job is important and that they want me to have the tools to do it properly. I was ready to move on just like my predecessor, but the system changed everything."

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