



SELECTING A COMMERCIAL VMS FOR NONPROFIT ORGANIZATIONS: A GUIDELINE

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Introduction:

Non-profit organizations exist for the purpose of accomplishing a collective social or public goal. By definition, a non-profit organization is a legal entity operating for the collective benefit as opposed to a business operated to generate profit for its owners. It is essential that non-profits hold the values of accountability, trustworthiness, honesty, and devotion. In order to accomplish these goals, in many cases, volunteers are recruited and managed.

Volunteer Management Systems (VMSs) are software packages that are meant to help increase the productivity of an organization by managing volunteers, providing coordination of different tasks to volunteers, and administering volunteer programs, events, and initiatives (Schönböck, 2021).

Examples of common tasks a VMS can do:

- Register volunteer information and store it in a database
- Customized stored volunteer information
- Quantify volunteer hours and generate reports in PDF format
- Generate a volunteer schedule/calendar where events can be added
- Generate summaries for scheduled events
- Communicate between VMS administrators
- Switch between different available languages
- Provide technical support

Background:

Desired Features of a VMS:

There are a few notable features that make a VMS a reliable system according to *According to A Survey on Volunteer Management Systems* (n.d.).

- A good VMS should be able to control workflow.

This includes the ability to assign a task that fits a volunteer depending on the volunteer's profile as well as the ability to assign tasks easily and quickly because volunteer work is not always fully planned. Unexpected things can happen, and the management system should be able to implement the changes efficiently.

- A good VMS should also be able to allow the volunteers to choose their tasks.

This is to keep the volunteers happy, so that they continue to volunteer especially if they are unpaid volunteers.

- For the same reason, a VMS should also have a way for the volunteers to provide feedback.

It is essential that the organization provides a way for the volunteers to send any feedback so that if there is a problem it can be fixed. This also allows the VMS to evolve.

- Another quality of a good VMS is that it should have a way that the stakeholders can assess the work done and the volunteers.

This is to make sure the program is running efficiently for the long term. It allows insight into the program and allows changes to be made to further improve the volunteer management.

- A good VMS should also be continuously evolving as the volunteers themselves grow.

Returning volunteers should eventually be given a different perspective of the VMS like adding achievements or a different view of the tasks.

Process of Selecting a VMS for Organizations:

Introduction

The following section will explain the detailed process of selecting a commercial VMS for a non-profit organization. These steps are suggested, and it should be noted that they may vary from organization to organization based on the specific needs of the organization.

General Steps at a Glance:

1. Research and understand the needs of the non-profit
2. Research systems that will potentially meet the needs of the organization
3. Gather the characteristics of a VMS in the form of a table
4. Reach out to the companies that potentially meet the needs of the given organization, update table
5. Demo the softwares of interest, update table
6. Select a VMS that will best meet all the organization's needs based on the demo and research known

Steps in Detail

Step 1: Research and understand the needs of the non-profit

It is crucial to understand what the goals of the non-profit are and what exactly must be organized in the form of a VMS. This information can be gathered through research of the non-profit, but also, in the form of key-informant interviews. A key informant interview is a qualitative in-depth interview with people who know what is going on within the organization. In the case of a non-profit, it is important to collect the information directly from the source (whether that be professionals or residents). Those who have first-hand knowledge about the organization should be identified and contacted.

Suggested questions for key informants:

- What are the goals of the program?
- What is the process of signing up?
- How many volunteers does the organization have?
- What are some struggles with the current volunteer management system? (if there is an existing one)

What specific features are you looking for in the VMS? The budget for the VMS should also be decided on as that will help narrow down selection. Most VMSs will have similar features, but the scale of the features depends on the cost. Also, most VMSs will have services which can be helpful to the set-up of the system, but for an added cost. By having a budget, it will help with the decision on whether to have the extra services or not.

Step 2: Research systems that will potentially meet the needs of the organization

After learning about the needs of the organizations, a comprehensive list of volunteer management systems that satisfy the non-profits requirements should be generated. Typically, a VMS is needed to increase organization, optimize the workflow of the organization, and assist in quantifying the work done by the volunteer. A list of commercial VMS options can be found in the Appendix 1.

Step 3: Gather the characteristics of a VMS in the form of a table

Throughout the process of selecting the VMS, it is essential to stay organized. Creating a table of VMS features and corresponding VMSs is an easy way to track the flow of information and always stay up to date with the status of the selection process. It is also important to keep in mind the annual or monthly cost, platform type (cloud, SaaS, web, etc.), and volunteer registration capacity. All of these factors will be dependent on the given organization that is looking for a VMS. A template table can be found in the Appendix 3 where key characteristics can be laid out.

Step 4: Reach out to the companies that will potentially meet the needs of the given organization, update spreadsheet

Once the background research of the non-profit and VMS research is done, it is a good time to reach out to the companies of interest. This can be done via email, phone call, or through the chat feature on the company's website. The message should make sure everything researched is correct so that nothing is assumed. The message should contain the nonprofit's requirements for the VMS and an inquiry about a cost estimate for x number of volunteers if the cost depends on that. The number of volunteers should be the number of volunteers the organization has a year.

It is important to maintain a good relationship with the companies by being polite and formal as it may lead to a lasting relationship. To stay organized, it is advised to keep track of the "current status" of communication between each company within the spreadsheet. It is easy to lose track of communication when keeping contact of multiple VMSs.

Step 5: Demo the softwares of interest, update spreadsheet

Most VMS companies will offer demos of the software as a way to allow the organization to test the features offered and ensure that it will do the job correctly. While testing the system, it is important to see if it is easy to use or not while also meeting the given requirements. Setting up a demo also allows the organization to observe whether it is visually appealing. The spreadsheet should also be updated.

Step 6: Select a VMS that will best meets all of the organizations needs based on the demo and research known

Based on the demo and the surrounding research, a selection can be made. The template table will help make this selection as it should be clear which VMSs meets the needed requirements. Once the VMS is decided, the company of said VMS should be contacted to begin creating the system. Each company has a different way of setting up the system for an organization to use. Some provide help in setting up the system after purchasing, and most work with the organization to create a custom system for the organization. Some will set up the system and give the final cost afterwards. At this point, the process depends on the company that hosts the volunteer management system.

Appendix 1: Commercial VMS

The following commercial VMS options are largely available to non-profit organizations and have been narrowed down based on reliability, compatibility between volunteers and organization, and efficiency. This section contains summaries of the VMSs taken from company websites.



HandOnConnect

This is a cloud-based system that allows one to customize the look and theme of the software. *Hands on Connect* also offers technical support to help an organization throughout the whole process. They offer two types of administrative services: maintenance system administrator and virtual system administrator. Both services have a person making sure the system runs smoothly as well as creating the template or designing the look of the system. The virtual system administrator, however, offers more services like day-to-day support as well as refining the data in the database. These administrators make sure the VMS is the best it can be.



VolunteerMatters

Volunteermatters is a good system for signing up different groups to volunteer as a group leader has the ability to sign up the entire group. It offers training resources and feedback loops so that tedious tasks can be processed automatically. This system can also be used on any device, so it is accessible to everyone. There is a growing plan that can hold 500 volunteers and 2 admins. The volunteer application form can be customized, and the system can provide history reports. The professional plan costs more than the growing plan but allows 10 admins and can hold 1500 volunteers. It provides those same abilities as the growing plan, but an additional aspect is the customizable volunteer portal as well as automatic on-boarding processes.



VolunteerHub

This management system offers three different plans that vary in price. There is a plus plan that is 150 dollars a month and a pro plan which is 269 a month, both having a setup fee of 595 and 795 dollars respectively. Each plan also has a different volunteer registration capacity with a difference of 1000 volunteers between the two plans. This system also offers an enterprise plan that can hold at least 2500 volunteers. The system is cloud-based, has technical support, allows an admin to schedule events, and provides statistical reports. One disadvantage to this system is that to store info, there is an extra fee of 348 dollars/year. Another disadvantage is that the language can only be changed in the kiosk app.



Volgistics

Volgistics is used by 3400 organizations and works well with windows. The developers have developed this VMS from 20 years of experience working with volunteer leaders. It was released in 2004 and has been improving since then. It offers a lot of customizations to its system. The different fields in *Volgistics* can be changed to have different titles. It is a web-based system and there is no limit to how many volunteers it can take. However, the more volunteers, the higher the cost of the system will be. The price also depends on the number of users that oversee the system as well as added features. The users are allowed to change the schedule and assign tasks to volunteers. *Volgistics* offers technical support, stores data, and can produce statistical reports. One downside to this VMS is that it does not offer the option to change the language of the system. Google translate is utilized to change languages.



Sumac

The system presents many different plans, each with varying prices and the numbers of volunteers it can take. It starts at 30 dollars a month and goes up to 250 a month. The different plans also vary in the amount of storage available from 5 gigabytes to 50 gigabytes. This system allows the language to be changed and offers technical support and statistical reports. It also offers the option of integrating the system into an organization's website. It is web-based and not cloud-based.



Helper Helper

Helper Helper has a software platform, and, like some other systems, it has an app. The system allows the admins to schedule events with specific time frames to further help with organization. The admins can also only have some sections available to some volunteers. The volunteers can also choose from the tasks available. The system can register volunteers on the organization's website, so the procedure of processing is all done through the system. It also offers single sign on integration for one-time volunteers. The people at *Helper Helper* work together with the needs of the buyer to create the best platform for the organization.



Samaritan

This VMS, *Samaritan*, also offers many customizations like *Volgistics*. It can be used to execute the process of recruiting, managing, scheduling, and tracking volunteers. They have automated steps, so that the system will be uploaded with the information input. This VMS is more expensive than the other volunteer management system. The system also offers multi-language translation. The software can also produce different forms for different types of volunteers like underage volunteers. They also help with the customization of the system by hearing what the organization's needs and requirements are and then build an ideal system for the organization. This system is mainly used in hospitals and medical facilities to help organize volunteers that come to help with patients.



YourVolunteers

YourVolunteers spent 14 years creating different types of applications. The system is automated and runs very quickly. This VMS is very cost friendly, offering a free version with advertising. Although there are probably some limitations, it can hold 1000 volunteers per focus or field and add schedules to the calendar. The administrators can also receive daily summaries. The premium version is only twenty dollars a month. It has all the things the free version has as well as allowing administrators to send messages and notes to volunteers and sending weekly schedules through email. *YourVolunteers* also offer a custom version as well.



VolunteerImpact

The system is like *Volgistics* and *Samaritan* in that it also has customization aspects. *Volunteer Impact* offers customizable volunteer profiles and organization profiles. Communication using the system is available, so the administrators can email individuals or a large group or can text as the system is also supported through the phone via an app. This system offers QR code sign ins, record tracking, learning modules, backups, and scheduling control. The system can be used for organizations with multiple locations or departments. The price depends on the number of volunteers, so there is no limit to the number of volunteers the system can handle. This system can set the language without utilizing google translate.

Appendix 2: Open-Source VMS

A Volunteer Management Dashboard was developed by WPI students, Kush Shah, Daniel Johnson, Gabriel Tamayo, Julie Lee, and Hannah Jayne, that can do most tasks a commercial VMS can do. A software by the name of Retool was utilized for this. The Retool software has a cost of \$120 dollars per year per administrator. This is a considerably lower cost compared to other VMS available in the market. This is a cloud based option that bypasses the need for volunteers to sign in to use the software and is more accessible to the public as anyone with the link can view it. The link for the dashboard can be found below.

<https://enlacedemo.retool.com/embedded/public/c477ea48-9586-4e92-8d07-29fc179de060>

Appendix 3: Evaluation Table

The table below provides an example of how to stray organized throughout the selection process. The row at the top contains examples of characteristics of the VMS but should be altered based off of the specific needs of the non-profit. The column on the far left is a placeholder for the different VMSs that will become prevalent throughout the process.

VMS	Cost	Registration Capacity/Storage	Platform Type	Technical Support	Languages Available	Statistical Report	Contact Info	Current Status
VMS 1								
VMS 2								
VMS 3								

Bibliography

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