

## Software Selection Worksheet

There are hundreds of Volunteer Management Software (VMS) platforms out there. By using this worksheet, you can determine your key requirements and therefore more easily find the best fit for your program's specific needs. Once you have completed the worksheet, base your research on your identified needs.

**Annual Budget:** \$ \_\_\_\_\_

(Use the highest amount you are able to pay. While everyone is looking for a "free or cheap" option, it's important to know what you **can** pay for the exact features you're looking for.)

### Goals:

Challenges or Opportunities: (why do you need the new/upgraded platform?)

Objectives: (What do you want it to be able to do for you?) Check all that apply.

<input type="checkbox"/> Save time <input type="checkbox"/> Reduce no-shows <input type="checkbox"/> Increase retention <input type="checkbox"/> Simplify recruitment	<input type="checkbox"/> Facilitate communication <input type="checkbox"/> Standardize training <input type="checkbox"/> Improve reporting
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Other: \_\_\_\_\_

### Requirements:

Who are the people who will be using the platform?

<input type="checkbox"/> Leader of Volunteers <input type="checkbox"/> Other staff	<input type="checkbox"/> Volunteers <input type="checkbox"/> Executive Director
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Other (ie Board Member): \_\_\_\_\_

Are there limits as to what each of these types of people can see or do (ie: only the leader can see a volunteer's contact information)?

What manual processes do you have that could benefit from automation?

**Features:**

Below are a list of features based on broad categories. For each, assign a level of need: **Essential** (can't operate without it), **Helpful** (it would save time and make things easier), **Nice to Have** (icing on the cake).

Scheduling:

Feature	Function	Level
Shift Scheduling	Allows leader to view, schedule and change volunteer shifts.	
Self-Scheduling	Allows volunteers to view, schedule and change their own shifts.	
Shift Exchange	Allows volunteers to swap shifts, allowing them more flexibility.	
Time Tracking	Allows leader & volunteers to track their hours.	
Waitlist Management	Allows volunteers to add themselves to a full shift, so if someone cancels they can step in.	
Multi-Site Scheduling	Allows the leader to manage scheduling across multiple locations.	
Other		

Communication:

Feature	Function	Level
Message Templates	Allows leader to easily create templates for standard messages via email or text.	
Mass Communication	Allows leader to send the same message to multiple volunteers.	
Customizable Fields	Allows leader to personalize messages with specific information.	
Automated Reminders	Sends automatic reminders to volunteers re shifts or events.	
Two-Way Communication	Allows volunteers to respond to messages from the software and communicate directly with the leader.	
Volunteer Profiles	Provides a platform for volunteers to enter contact info, etc.	
Surveys and Feedback Forms	Allows volunteers to give feedback on their experience, etc.	
Other		

Reporting:

Feature	Function	Level
Hour Tracking	Enables user to track the hours a volunteer has contributed.	
Engagement Metrics	Offers data on volunteer involvement in specific tasks/events.	
Demographics	Offers data on volunteer demographics (age, gender, etc).	
Retention Rates	Offers data on the length of time people volunteer with the organization.	
Comparative Analysis	Enables user to compare metrics over time or between programs	
Customizable Reports	Allows creation of customizable reports.	
Data Export	Allows users to export data to use in other programs, ie: Excel.	
Other		



# Karen Knight Consulting

Volunteer Management Strategist and Mentor

## Integrations:

Feature	Function	Level
Email Marketing	Allows mass communication with all stakeholders.	
Calendar Software	Allows syncing of shift calendar with external calendars.	
Payment Platforms	Collection of donations or event fees from within the VMS.	
Social Media	Allows communication through social media for promotion, etc.	
Background Check Services	Request and track background checks on volunteers.	
CRMs	Allows comparisons of volunteer data with donors, etc.	
Learning Mgmt Systems	Create and track training from within the VMS.	
Survey Tools	Create and send surveys, then track and analyze results.	
Other		

## Non-Operational:

Feature	Function	Level
Encryption & Security	Protects volunteer data from unauthorized access.	
Two-Factor Authentication	Adds an extra layer of security.	
Role-Based Access Control	Allows only specific people within the organization access to certain types of data.	
Ease of Use	User friendly interface and design; intuitive and easy to learn.	
Customizable Dashboards	Allows user to personalize the interface.	
Mobile Accessibility	Allows users to access the software from mobile devices.	
User Training & Support	Offers effective training and support as needed.	
Accessibility Compliance	Software is usable by those with disabilities.	
Backup and Recovery	Provides regular data backups and recovery options in case of system failures.	
Other		

## Extras:

Feature	Function	Level
Training System	Allows for custom online training videos.	
Resource Library	Allows creation of downloadable resources for volunteers.	
Recognition and Awards	Reward contributions with badges or certificates, acknowledge birthdays and anniversaries.	
Opportunity Board	Post opportunities and projects for volunteers to apply for.	
Volunteer Matching	Match volunteers with roles based on skill, interest, & availability	
Community Building	Provides tools for volunteers to connect with each other & share resources.	
Referral Programs	Enables leader to incentivize current volunteers to refer friends.	
Other		