



ARE YOU UP-TO-DATE on VOLUNTEER MANAGEMENT TECHNOLOGY ?

Do you have the right technology in place to manage and engage your volunteers? Volunteer management technology can save you *lots* of time and make managing your volunteers easier. Take our fun (and super helpful) quiz to find out how technology can help you to more effectively coordinate and excite volunteers, sustain your programs, and measure impact. Add the points beside your answers to determine your technology readiness score and learn more about the steps you can take to update your volunteer management processes. Whether you're new to technology or an experienced coordinator, our quiz will help you find the best ways to boost your volunteer management technology. Let's get started!

This resource brought to you by:

 **Get Connected**
by galaxy digital

BASIC VOLUNTEER MANAGEMENT

1. How do volunteers connect with opportunities?

- We have a list of volunteers that we reach out to individually to find out who's available for upcoming opportunities. [0 points]
- We post an updated list of opportunities on our website. Volunteers can email us to express interest. [1 point]
- Volunteers can search online through a detailed opportunities database and schedule themselves using our digital calendar. [5 points]

2. How do you remind volunteers about their upcoming shifts?

- We don't remind our volunteers about their scheduled shifts. [0 points]
- We call or email each volunteer to remind them about their scheduled shifts. [1 point]
- Volunteers are automatically reminded the week and day before a scheduled shifts. [5 points]

3. How are you collecting waivers and other documentation from your volunteers?

- Volunteers sign waivers and provide documentation in person. [0 points]
- Volunteers are emailed a paper or digital waiver and documentation to sign and return. [1 point]
- Volunteers can access waivers after registering for opportunities online and sign electronically. Documentation is then stored in a volunteer profile. [5 points]

4. How are you checking your volunteers into a shift?

- We typically don't check volunteers in. When we do, we use pen and paper. [0 points]
- We use a free online form or spreadsheet to check volunteers in. [1 point]
- Volunteers can check in using a digital kiosk or a mobile app. [5 points]

5. How are you logging volunteer hours?

- We record volunteer hours on paper and keep them in a file. [0 points]
- We record and track hours via a spreadsheet. [1 point]
- Hours are automatically logged when a volunteer checks-in or can be individually assigned using our online platform. [5 points]

POINTS :

6. **How many active volunteers does your organization have?**

- 500 + [0 points]
- 100 - 499 [1 point]
- 1 - 99 [5 points]

7. **How many total hours do your volunteers currently log annually?**

- 5000 + [0 points]
- 1000 - 4999 [1 point]
- 1 - 999 [5 points]

8. **How easy was it to find the information required to answer questions 6 and 7?**

- I still can't find the answer. [0 points]
- It took a bit of digging, but I found the answer eventually. [1 point]
- I have this information readily available. [5 points]

9. **How are you currently reviewing and reporting on volunteer activity?**

- We are not currently reporting on our volunteer activity. [0 points]
- We create reports manually using a spreadsheet program. [1 point]
- We have a system that automatically compiles our data into exportable reports. [5 points]

10. **What percentage of your time at work do you spend on administrative and coordination tasks** (i.e. entering volunteer data and managing schedules and calendars)?

- 50 - 100% [0 points]
- 20 - 50% [1 point]
- 5 - 20% [5 points]

11. **What percentage of your day do you spend on volunteer engagement and program strategy** (i.e. implementing engagement strategies, understanding your program's impact, and interacting with volunteers)?

- 0 - 20% [0 points]
- 20 - 50% [1 point]
- 50 - 90% [5 points]

POINTS :

ADVANCED VOLUNTEER MANAGEMENT

12. **You need to send an urgent message to your event volunteers letting them know there is a last-minute schedule change. How do you accomplish this?**

- We call volunteers individually. [0 points]
- We are able to send an email blast to volunteers that have signed up for that event. [1 point]
- We can filter emails and phone numbers based on event attendees and send a single email and/or text to all event volunteers. [5 points]

13. **How well do you know your volunteers? Do you have a system that tracks volunteer interests and skills to help you better match volunteers to your opportunities?**

- We do not currently track individual volunteer's interests, skills, and passions. [0 points]
- We email a volunteer survey (or similar) and ask our volunteers about the kinds of work they may be interested in. [1 point]
- We have a system that captures this information during the volunteer registration process. It can be used later to match volunteers with appropriate opportunities. [5 points]

14. **How do you keep your volunteers engaged throughout the year?**

- We rely on individual outreach. [0 points]
- We have regularly monthly communication via email featuring upcoming opportunities and promotion of events on social media. [1 point]
- We have a system that offers multiple automated communication tools, including recommended opportunities based on volunteers' interests and skills. [5 points]

15. **How many tools are you using to schedule, manage, and communicate with your volunteers?** Check all methods you currently use to schedule, manage, and communicate with your volunteers:

- | | | |
|--|---|---|
| <input type="checkbox"/> Pen, Paper, and a Clipboard | <input type="checkbox"/> Email and Text Messaging | <input type="checkbox"/> Automated Hours Tracking |
| <input type="checkbox"/> Spreadsheets | <input type="checkbox"/> Shift-Based Scheduling | <input type="checkbox"/> Reporting |
| <input type="checkbox"/> Free Online Sign-up Form | <input type="checkbox"/> Website | <input type="checkbox"/> Mobile App |

How many boxes did you check?

- 1 - 3 [0 points]
- 4 - 6 [1 point]
- 7 - 9 [5 points]

POINTS :

TOTAL POINTS :

YOUR RESULTS

0 - 15 POINTS OPPORTUNITY to GROW

You may spend most of your time on scheduling, coordination, and administrative tasks, leaving little capacity to engage volunteers and grow your program. Typically, much of your day is spent communicating via phone or email to schedule volunteers and answer their questions. You may also feel, at times, that it's easy to lose track of volunteer information. All this paperwork can seem overwhelming, but don't panic! Your program can benefit from centralizing several of your volunteer management practices to free up your time—time you can spend on engagement and growing your impact. **See our attached Technology Guide for actionable steps you can take to introduce technology into your volunteer management processes.**

16 - 49 POINTS OPPORTUNITY to IMPROVE

You have some technology in place to help with coordination and scheduling. You're able to spend some time engaging volunteers and developing strategies to grow your program, but there's room for improvement. You may have a system, or several systems, in place to simplify data tracking, but accurate reporting is a challenge. You may benefit from consolidating processes and systems, so your information is easier to access quickly. For example, you use a CRM or email system, but your volunteers' contact data is collected and stored using a separate process. Organizations in this category tend to struggle with advanced volunteer management needs, such as coordinating teams of volunteers or advanced reporting. **See our attached Technology Guide for actionable steps you can take to improve your existing volunteer management processes.**

50 - 75 POINTS OPPORTUNITY to UPGRADE

Your program is centralized and you're already using a dedicated volunteer management system. Your technology helps you to not only coordinate volunteers, but also engage them. You're able to get to know your volunteers so that you can match them to opportunities and keep them excited about your cause. While you're already using a volunteer management software, you may be ready to consider a more advanced option to reduce workarounds and boost your return on investment. **See our attached Technology Guide for steps you can take to evaluate your existing volunteer manageable software.**

WHAT'S NEXT ?

Have a look at our Technology Guides according to your score for practical steps your organization can take to grow, improve, or upgrade your volunteer management processes and technology. Use the page numbers below to skip ahead to the Technology Guide based on your score:

Opportunity to Grow **p. 6**

Opportunity to Improve **p. 8**

Opportunity to Upgrade **p. 10**



3 WAYS TO GROW YOUR PROGRAM

OPPORTUNITY TO GROW TECHNOLOGY GUIDE

It can feel overwhelming to completely overhaul your management processes. Instead, we recommend taking small steps to introduce new systems with the goal of reducing stress, getting organized, and freeing up more of your time to focus on engagement and strategy. To help you begin, we've come up with some real, actionable steps you can take now to grow your program and save time:

1 Capture Important Data

Focus on capturing these three key data points to ensure more accurate reporting. This data is especially helpful when it comes to reviewing your programs and applying for grants:

- **Number of Active Volunteers** - How many volunteer participate in your programs annually?
- **Number of Volunteer Hours Logged** - How many total hours do all your volunteers log annually?
- **Opportunity & Event Attendance** - Which volunteers are showing up to their opportunity shifts?

How to Collect the Data You Need

Start with Spreadsheets - Introducing spreadsheets makes for a smooth transition for volunteer programs new to technology. Use a spreadsheet system (such as Google Sheets or Excel) to organize volunteer data and track their hours in one sheet. Each column should represent a new piece of data (such as first name, last name, and email address) for quicker searching. We recommend you collect and enter all necessary volunteer information upon registration. You can also use these spreadsheets to log each volunteers' hours.

Have a Check-in Process - When volunteers arrive at an event or shift, check your volunteers in so you collect an accurate attendance count. You can build an attendance spreadsheet or use a number of free online options. Online tools like [Survey Monkey](#) let you customize sign-in forms to capture important information like the volunteer's name, time of check-in, and the number of hours the volunteer is assigned.

2 Invest in Email

Email is the most common way volunteer programs communicate with their volunteers. For this reason, email management software is useful for keeping your volunteers informed and engaged. Many small businesses use a basic email engagement software but we recommend doing a bit research to find a system that works for you.

How the Use Email to Engage Volunteers

Create a Newsletter - Excite your volunteers with a monthly newsletter featuring upcoming opportunities, events, and reminders. If your organization works with community partners, you may consider highlighting a "Cause of the Month," or celebrate your most active volunteers with a "Volunteer of the Month" section. Take your newsletter a step further by recommending opportunities based on your volunteers' top interests. Newsletters remind your supporters that you still need them and that you have plenty of exciting opportunities just for them.

Send Email Reminders - A week before an event or upcoming opportunity, then the day before, send an email reminding volunteers that they're signed up to participate. Include any important information like the location address, where to park, and what they need to bring. This will reduce the number of no-shows, and volunteers will get a sense that you're relying on them.



Digitize Your Waivers and Documentation - Instead of having your volunteers sign waivers and other necessary documentation in person, send an "onboarding" email shortly after a volunteer signs up for an opportunity. Attach all necessary documentation to the email digitally. You may consider implementing an electronic signature program like DocuSign. This will ultimately save you time, and even allow volunteers to participate sooner. Because you have already digitized these documents, you can also store them on your computer or online so they're secure and easy to access quickly.

3 Post Opportunities Online

Your website is a great place to list your upcoming volunteer needs and events. Create a clearly marked page on your website that people know to go to if they want to find volunteer opportunities. A "Volunteer Now" button, or page header is a clear call to action that invites prospective participants to check out your opportunities.

Best Practices for Listing Your Opportunities

Include Need-to-Know Information - There's a good chance you're spending a lot of time on volunteer scheduling. When listing your opportunities on your website, be sure to include the data, available shift times. Additionally, write a brief description of the task you're asking volunteers to perform and any requirements. This way, volunteers can self-identify the opportunities that work for them.

Keep Listings Updated - Outdated listings can muddle your opportunities page and make registration more difficult for your volunteers. We recommend devoting a bit of time each week to removing expired listings and adding new, upcoming ones!

Simplify Sign-Up - Once your volunteer identify an opportunity that they'd like to participate in, make it easy for them to sign up. You can ask volunteers to email you to express their interest, or use an [online survey tool](#) to collect all the necessary information you need to schedule volunteers. Whichever method you choose, it's important to make it clear (1) *how* you want volunteers to sign up (i.e. email, survey, phone) and (2) the information you need to schedule volunteers (like their full name, email address, phone number, and preferred shift time).

Check out the example listing below. You can post simple, yet informative listings like this right on your website:

Pet Pals - Socializers and Dog Walkers

What You'll Do

We're looking for volunteers to assist in socializing and keeping our pets active and healthy. During this time you may walk dogs, play with kittens, and give some TLC to those who are new to the shelter and still adjusting! This opportunity is family-friendly.

Available Shifts

2/4/20

9:00 AM - 11:00 AM
12:00 PM - 2:00 PM

2/5/20

12:00 PM - 2:00 PM
3:00 PM - 5:00 PM

2/7/20

9:00 AM - 11:00 AM
3:00 PM - 5:00 PM

Sign-Up Now!

Click the survey link below to sign up. Please include your legal name, phone number, email address, and preferred date and time in the spaces provided. We will send you a confirmation email within 2 business days. Thank you!

3 WAYS TO IMPROVE YOUR PROGRAM

OPPORTUNITY TO IMPROVE TECHNOLOGY GUIDE

You have systems in place to make scheduling and managing volunteer data a bit easier. But there are ways to centralize these processes, so that volunteer registration, opportunity listings, communication, and hours data are all in one place. You may also find a need for more robust engagement and reporting tools to help grow your program. The following steps will help you to adopt a dedicated volunteer management technology.

1 Create Your Wishlist

Before investing in technology to improve the way you manage volunteers, we recommend you make a list of the technology features and tools you would find most helpful for your day-to-day operations. By doing so, you'll be able to look into a system that improves your management. By compiling this list, you'll enter the research phased more prepared. The following checklist is comprised of the most useful and common features volunteer coordinators go for:

SOFTWARE FEATURES:

- | | |
|--|---|
| <input type="checkbox"/> Automated Hours Tracking | <input type="checkbox"/> Team Registration |
| <input type="checkbox"/> Custom Reporting | <input type="checkbox"/> Donations Manager |
| <input type="checkbox"/> Shift-Based Scheduling | <input type="checkbox"/> Mobile App |
| <input type="checkbox"/> Integrated Background Checks | <input type="checkbox"/> Volunteer Profiles |
| <input type="checkbox"/> Social Media Compatibility | <input type="checkbox"/> Self Sign-Up |
| <input type="checkbox"/> Multi-Manager Log-In | <input type="checkbox"/> Free Data Transfer |
| <input type="checkbox"/> In-App Email and Text | <input type="checkbox"/> Event Management |
| <input type="checkbox"/> Free Customer Care | <input type="checkbox"/> Automated Reminders |
| <input type="checkbox"/> Surveys & Custom Registration Questions | <input type="checkbox"/> Service Learning Courses |
| <input type="checkbox"/> Disaster Response Capacity | <input type="checkbox"/> Impact Reports |
| <input type="checkbox"/> Volunteer Resume | <input type="checkbox"/> Community Partner Compatible |
| <input type="checkbox"/> Integrated Blog | <input type="checkbox"/> Custom Website |

OUR TECHNOLOGY PRIORITIES

1. _____
2. _____
3. _____



OPPORTUNITY TO IMPROVE TECHNOLOGY GUIDE [continued]

2 Do Your Research

Once you have created your wishlist, you'll have a set of criteria and priorities when comparing volunteer management technology options. It's important to do your research in order to find a volunteer management software that meets your needs. Have a budget prepared, keeping in mind that investment in technology can actually help to improve your program's return on investment.

Where to Look for Volunteer Management Technology

Software Comparison Sites - We recommend software comparison sites like [Capterra](#) and [G2](#) to inform your decision. These sites incorporate real customer reviews and make it easy to compare volunteer management solutions based on pricing, key features, and customer reviews.

Peers - Your peers are a great resource. Reach out to local nonprofits or affiliates to get a sense of the systems that they are using. What's working for them? What are their workarounds? The exchange of knowledge can be rewarding for both parties, and you'll learn about the kinds of technologies that work for organizations like yours.

Nonprofit Resources and Blogs - There are plenty of online websites and blogs chock-full of resources for nonprofits of any size. You probably have your go-to resources that you trust. These are a great place to start. We also refer to sites like [Whole Whale](#) when we have questions about volunteer management.

3 See It in Action

Many volunteer management products offer free demonstrations that enable you to view the software before committing. The most useful demos tend to be live, led by a product specialist that can show you around and point out the features that are helpful to your organization. They can also work with you to answer specific questions you may have. These demonstrations are often carried out via webinar, so you won't have to leave your desk! We highly recommend you research *and* sign up for a demonstration of the software before investing time and money into a product!

3 WAYS TO UPGRADE YOUR PROGRAM

OPPORTUNITY TO UPGRADE TECHNOLOGY GUIDE

According to our quiz, you're doing great! And if you're happy with technology you have in place, congratulations! A volunteer management system that works for your specific needs is the goal, after all. However, if you find that you are experiencing challenges and having to find workarounds for essential functions, you may reconsider your existing system to increase your return on investment. Here are some steps you can take to build an awareness of other systems on the market and make sure you have the right system in place:

1 Identify Challenges

Do you have technology in place, but are having to work around a few challenges? Before you consider a new volunteer management technology, we recommend you make a list of the workarounds you're experience with your current systems. We work with volunteer organizations daily from across North America, and these are some of the most common challenges we encounter, according to volunteer professionals:

- **Managing Teams and Corporate Groups**
- **Mobile-Friendly Interface**
- **Integrating Communication** (i.e. Text Messaging, Email)
- **Detailed Reporting**
- **Exportable Data**
- **Pricing**

2 Do Your Research

Once you have identified challenges and workarounds with your current technology, you're prepared to begin considering an upgrade. It's important to research the options out there, so that you truly *are* improving the way you manage volunteers. Remember to prepare a budget, keeping in mind that investment in technology can actually help to improve your program's return on investment.

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