A CONSUMERS GUIDE TO SOFTWARE FOR VOLUNTEER MANAGEMENT

May 2011

TABLE OF CONTENTS

INTRODUCTION

Volunteer-based organizations have to keep track of a lot of data—for example, contact info, schedules, time sheets and job sites—and the right software can help, freeing time for managing volunteers. There are a number of products out there, but it's surprisingly hard to find information about them.

We hope this report remedies that. We designed it to serve as an introduction to volunteer management software: what's out there, what to expect and how the different solutions compare.

We began our research by talking to different consultants, experts and volunteer managers about what they want from volunteer management software, and the systems with which they're familiar. Then, reinforced by Internet research and information from volunteer management email discussion lists, we defined a list of the three standalone volunteer management systems and the three consolidated constituent management systems most frequently mentioned. The vendors demonstrated the systems for us, and we spent some hands-on time exploring the software to better understand each system's strengths and weaknesses. In addition to these six systems, we've included 21 other systems to consider, located in the **Also Consider** sections at the bottom of each review.

"Volunteer-based organizations have to keep track of a lot of data, and the right software can help."

This report sums up what we learned. It covers the basic features and functions that might be desirable in a volunteer management package, and then discusses the pros and cons of standalone volunteer management systems vs. systems that track volunteers alongside donors or other constituents. Finally, it compares the strengths and weaknesses of the leading software packages. Whether you're upgrading your existing system or just starting out, use this report to guide you.

techsoup GLOBAL   idealware

FEATURES AND FUNCTIONS

What do volunteer management systems do? What features does your organization need? Some features are targeted at organizations with large volunteer programs, but some are critical to almost any organization that works with volunteers.

The following descriptions cover the most commonly needed elements and features of volunteer management systems.

"Many basic fields may be shared by donor or constituent management software already in use at your organization."

Volunteer Profile

The most basic element of a volunteer's profile is his or her contact information. Obviously, you'll want to track each person's name, mailing address and email. You may also want to capture more specific information, such as special skills, or the type of work in which they're interested. Many systems can track custom categories and groups that allow for faster searches and better management.

Depending on your organization's size and mission, you may require certain things of volunteers before they can being working—for example, you may need

to track and easily see if they've finished a set of required trainings, or signed their contracts. Most systems handle this reasonably well, in many cases using custom fields for such information. If your volunteers work in a hospital or with children, you may also track whether they've fulfilled mandatory health or background screenings. Some specialized volunteer software packages can run background checks when new volunteers apply, and flagged registrants can be automatically redirected out of the system.

When considering standalone volunteer management systems, keep in mind that many basic fields may be shared by donor or constituent management software already in use at your organization. Does it make sense to add another system for volunteers? If your primary needs aren't in this area, maybe not.

Activity Tracking

Once you know who your volunteers are, you need to be able to keep track of what they do—and when they do it. While more general constituent management systems may use custom fields to track volunteer activity, a specialized volunteer management system should provide this out-of-the-box. At minimum, this means tracking dates and times that your volunteers work, and likely the tangible outcomes of their work. If your organization has volunteers at multiple locations, either local or across the country, you need to be able to track those as well.

But what about other activities or information? Do you need to track volunteer awards? The fact that one volunteer is managing a group of others? What about their travel miles or meal expenses for reimbursement? Many of these features may be of particular use to nonprofits with a large volunteer base, and may require a specialized volunteer management system.

Scheduling

The heart of a standalone volunteer management system is the ability to connect volunteers with the right job at the right time. This sort of functionality is indispensable for organizations with a broad range of jobs and volunteers, but smaller organizations may also find it useful for staffing recurring positions, or even one-time events. A system that allows volunteers to define their availability will make filling opportunities faster, while the ability to search by skills, interests or qualifications will make sure the right people are doing the right jobs.

For volunteer managers with ongoing jobs, a program that automatically schedules volunteers, allows for recurring volunteers, and potentially even lets volunteers pick their own schedules could save time by eliminating repetitive and time-consuming scheduling tasks.

Email

Some systems include broadcast email functions which let you manage and contact volunteers without using a separate application. Some even offer email functionality rivaling that of a standalone broadcast email tool, while others are more limited. Consider your needs—stronger features allow you to do more than simply send the same text to hundreds or thousands of people—for instance, they let you "mail-merge" data into emails, use graphical templates and provide reports on who opens and clicks through on emails.

Print Communication

In addition to email, many systems help you contact volunteers using non-electronic communications as well. The ability to create mail-merges and mailing labels is a convenient but rare feature in specialized volunteer management systems. Most simply export raw data as a text file, though some integrate with Microsoft Office. Some can export as Adobe .PDF files, which can be universally opened and read, but they can't be edited—consider your need for printed materials, and any existing methods or protocols your organization has for mailings when looking at software.

Online Features

Many organizations find it useful for new volunteers to apply, or for existing volunteers to change their own information, online—either through forms or a volunteer portal embedded in their website. If you want this feature, check to see the level of technical expertise you'll need to set up the web tools—can anyone do it, or do you need to know HTML, the language of websites?

By accessing their own accounts, volunteers can manage their own information, sign up for shifts or projects, edit their schedules and input their own hours. Advanced features in this area can drastically reduce the volume of your volunteer managers' work, and would be especially helpful to organizations with a large volunteer base.

If the system provides online forms or features, make sure they can be customized to blend into your existing web design. Can you add your logo? Change the colors? Add the same navigation bar? Ideally, you don't want your volunteers to know they are leaving your site.

Reporting and Exporting

There's no point in collecting data if you can't use it. Whether you have a quarterly budget meeting, weekly debriefings or major end-of-year reviews, you need software that can report on how many volunteers you have and what they're doing. In addition to running scheduled, preset reports, you may need to quickly and easily create custom, one-off or ad hoc reports, or export data to Excel or another system.

If you're using both a standalone volunteer system and a constituent relationship management method (like a donor management system), you may want to share or integrate data between them. Will the system integrate out of the box? Is there a method, like an API, to allow a programmer to create an interface between the two systems? Your volunteer system should, at a minimum, allow you to export data into a file format that's easily readable by other software, such as a text (.TXT or .CSV) or Excel file.

Customization

The ability to customize software is important to organizations that track different types of information about volunteers. Can you add custom data fields to cover gaps in the types of information the system gathers? Can you put them where they best fit, or are they relegated to an (often hard to find) custom field area? Are they available for reporting? Most systems allow for customized data fields, but some can be fully modified to your organization's preferences. Such thorough customization can make the software better match your processes, but generally comes with a larger price tag.

Ease of Use

Good software is worthless if no one in your organization can figure out how to use it. The complexity of the program you choose depends on the technical skill of the people who will operate it. Often, the more powerful a program is, the harder it can be to use—and vice versa. Can a novice user easily figure out what to do? Is it quick for someone to enter the same type of information over and over? Is the interface pleasant and easy to understand?

Pricing and Support

The cost and method of payment for these systems varies widely, and depends upon such factors as the amount of records you wish to keep, the number of people using the system, and whether the system is installed or provided over the web as a hosted system. While most web-based packages operate on either a monthly or annual fee, installed programs tend to have a larger up-front fee and smaller recurring fees to cover support and updates. Hosted systems tend to be cheaper initially but more expensive in the long run than installed systems, but the vendor deals with maintenance and upgrades so you don't have to.

Whether you choose a hosted or installed volunteer management program, you're likely to have questions about setup, operations and the occasional bug. Does the vendor provide strong customer support to answer questions? Timeliness is important: your system can't be down for a week because support is unavailable. Many software vendors provide support both over the phone and through email, while others provide only one or the other. Your organization needs to determine what is important to you before selecting a product.

techsoup GLOBAL idealware

STANDALONE OR CONSOLIDATED?

For most organizations it will make sense to track volunteer information in the same system as other constituents—especially donors. Often, volunteers are especially good prospects for donations, as someone involved in one way with your organization is more likely to get involved in other ways, as well. It's useful to have all your constituents in one place in order to see the full scope of their involvement with your organization, to avoid having to sync contact information between multiple systems, and to avoid having to figure out which system to look in when someone calls with a question. And many organizations may find that their existing

"Most small to medium sized organizations are better served by CRMs with built-in volunteer management; it eliminates the need for complex, expensive integrations, making it easier to manage [your records], since there is often overlap."
–Steve Beshuk, JCA

"Integrated systems will favor one form of management over the other. Don't consider budget, but the priorities of the organization: if volunteer-based, volunteer management should be your top priority." –Jayne Cravens, Coyote Communications

donor or constituent management system is flexible enough to provide the basic functionality they need to track volunteers. If you just need to track the basics—contact information, skills and availability—and need to be able to find volunteers appropriate for a particular job, it's almost certainly a better idea to consolidate your volunteer information and your donor information in one system. Even organizations with more advanced volunteer requirements may find that the system they're already using—or a new one that better meets all constituent needs—may have an add-on module that supports fairly sophisticated volunteer tracking at less cost than a standalone system.

techsoup GLOBAL

idealware

However, those with larger volunteer components may find standalone systems useful. If you're trying to schedule several hundred volunteers or more, the more sophisticated standalone tools may save you substantial time in trying to match volunteers to jobs. This is especially true if you're trying to match people in different geographic areas—few of the consolidated tools provide functionality to, for instance, help you automatically schedule volunteers for an opportunity near their home. If you have a full-time volunteer manager (or several), a robust volunteer management program could make their life considerably easier.

There's also a large range of online functionality. If you want not only to recruit volunteers online, but also to allow them to sign up online for particular volunteer opportunities or slots, you'll likely need to turn to a more advanced standalone system or do some custom programming on a consolidated one.

In truth, there's a surprising similarity in the available features between standalone and consolidated systems. More and more donor and constituent management vendors are developing functionality or add-ons to manage volunteers.

As with most software decisions, start by looking at the software you already have. Does your existing system provide enough support for volunteer information? Could you buy an additional module to add this functionality? If you're happy with the way you're handling other constituents, but can't get the efficiency you need in tracking volunteers in the same system, then it's time to start considering standalone solutions.

QUICK LOOK/REFERENCE CHART

In the next section of this report, you'll find detailed reviews of all the systems we looked at. In this section, however, you'll find a quick-reference chart to help you compare at a glance the different systems we reviewed. We rated the different categories of features on a three-point scale, and designated which systems include which features. We also indicated the categories in which each system excelled.

	Standalone Systems			Consolidated Systems		
	eCoordinator/ eRecruiter	Volgistics	Volunteer Reporter	DonorPerfect	The Raiser's Edge(i)™	Volunteers for GiftWorks
Volunteer Profile	Excellent	Good	Good	Good	Good	Good
Activity Tracking	Excellent	Good	Excellent	Excellent	Good	Good
Scheduling Interface	Excellent	Excellent	Good	Fair	Good	Excellent
Online Features	Excellent	Excellent	Fair	Good	Excellent	Fair
Email	Excellent	Good	Fair	Excellent	Excellent	Fair
Print Communication	Fair	Good	Excellent	Excellent	Excellent	Excellent
Customization	Excellent	Good	Good	Excellent	Good	Good
Ease of Use	Excellent	Excellent	Good	Good	Good	Excellent
Manages Additional Constituent Info	Fair	Fair	Fair	Excellent	Excellent	Excellent

○ Fair ◎ Good ● Excellent

techsoup GLOBAL   idealware

REVIEWS: STANDALONE SYSTEMS

eRecruiter / eCoordinator, by Samaritan

This suite of tools is highly customizable and user-friendly, with substantial features to let your volunteers submit their own information through your website. Strong in the tracking and scheduling you would expect from a standalone system, it's also strong in email functionality, though less so with print communications. This system is unique among those we reviewed in offering complete, instant background checks during the registration process or when requested by a staff member. Samaritan is the most expensive standalone product we looked at, but provides advanced functionality tailored to those with large volunteer programs.

Samaritan's two volunteer management offerings, eRecruiter and eCoordinator, are heavily integrated. Both are web-based, and each provides functionality that complements the other with only minor overlap between them.

eRecruiter, which provides the interface for potential and current volunteers, can blend seamlessly into your organization's website. Volunteers then use your web portal to set up and edit personal profiles, search for opportunities, enter their availability and manage their schedules. They're able to combine traditional search options with interactive maps and graphics to find opportunities by location. The look of the interface is fully customizable for your organization's needs and can be incorporated into your website's graphic design for a seamless transition for volunteers.

eCoordinator functions as the traditional, office-side volunteer manager, and is accessed by administrators and staff users to create, edit and manage volunteer profiles manually, run reports on volunteers and manage schedules through the calendar interface. They can also track multiple jobs and projects across many worksites and geographic locations, both local and global. Schedules can be built around a volunteer's availability. Jobs can be filled based on skill, interest, training level or other criteria. Schedules can be set as "recurring" with the same volunteers or different people each time.

Staff can browse and track volunteers through a customizable grid menu that lets them add or remove columns as search fields and save each unique layout. Layouts can be selected quickly through a drop-down menu to allow different coordinators to create a custom layout suited to their personal preferences or different needs.

Within eCoordinator, Samaritan offers a robust email functionality that lets you create email templates and conduct mail merges to personalize and streamline blast emails. This functionality does not translate well to print, however. A label-making feature exports labels as either an Adobe .PDF or tab-delimited .TXT file for printing, but does not support mail-merged letters without exporting the data to another system.

The Samaritan suite does offer a few volunteer profile features we didn't find in other packages, including an integrated screening process. When a new volunteer registers online for the first time, eRecruiter will perform a criminal background check and provide instantaneous results. You can choose to let the program automatically "lock-out" a failed registrant, or to share the results with a user logged into eCoordinator. The suite also offers basic social media integration—volunteers can post opportunities to Facebook, MySpace, Twitter and other common sites, and use those credentials to log in.

The web-based software and multi-browser support means all your volunteers can access eRecruiter, regardless of what system they use. Access to eCoordinator, however, is restricted to Microsoft's Internet Explorer version 6.5 or later, limiting administrators to Windows machines.

As can be expected with a system this robust and customizable, the price tag is on the higher end of those included in this report. Pricing for a configuration that's fully integrated with your website, and that includes criminal background checking, begins at about $5,500 for the first year and $2,500 for subsequent years. This includes design, setup, training and initial support hours. Additional administrative users, functions, training and support are priced separately if needed. The company also offers various discounts for which your organization may qualify.

Also Consider

If you're looking for the power of the Samaritan products, **Cervis** (www.cervistech.com) also offers a hosted, customizable solution. Or consider **Truist,** which offers a powerful set of features—it's also a more expensive solution, but you can use it for free if you're located in Massachusetts, New Hampshire or Maine, thanks to the Volunteer Generation Fund. Other states may offer other free volunteer tools. To find what your state offers, check www.serve.gov.

Volgistics

This well-rounded, web-based, reasonably-priced standalone volunteer management system offers a surprising capacity for printed communications and strong scheduling functionality, with an optional front-end interface. The scalable pricing model favors the smaller organization, but has a steep curve as your records expand. Emailing functions are limited, however, and the included technical support is strictly email-only.

Volgistics (created by the people who made Volunteer Works) is an established web-based system. Your staff can access Volgistics using most popular web browsers, including Firefox and Safari, but it's optimized for Microsoft Internet Explorer 5.0 or later.

Overall, the interface is reasonably straight-forward and simple to use. Most menus and options are easy to find. Unlike other systems we investigated, Volgistics allows the user to search through volunteer records using a useful "name sounds like" feature. The system provides the volunteer-oriented functionality you would expect from a stand-alone volunteer management system, including managing contact information, interests and hours. A useful calendar-based functionality allows you to schedule volunteers for particular opportunities. However, the software does not easily track reimbursable expenses, manage large-scale events or integrate with social media.

Volgistics offers some functionality for mail-merging printed communications like letters and mailing labels. While easy to create, all printable letters, spreadsheets and reports can only be exported as either .PDF files (great for printing, but read-only) or Excel .XLS files (editable but not particularly useful for letter formats). The system also provides integrated broadcast functionality, though it doesn't provide more advanced capabilities like the ability to mail-merge information into emails or to view reports on who opened each email.

There are two options for allowing volunteers online access to your organization. The standard system lets your organization create a registration application and jobs directory on your website for no additional charge. Or, with the addition of the optional VicNet module, you can grant volunteers access to their own profile and allow them to schedule themselves for volunteer opportunities online. You can customize the graphics of VicNet to look like your website.

If you use a lot of volunteers at a particular location, an additional module, VicTouch, allows volunteers to clock-in and clock-out, view their schedule and fill schedule openings using a touch-screen computer, which can be implemented as a kiosk. Both optional modules cost an additional monthly fee determined by the number of volunteer records you wish to store.

An organization with two users managing 1,000 volunteer records can expect to pay $53 per month, including the optional VicNet online module—about $636 per year. The cost is influenced by both the number of volunteer records you wish to maintain and the number of people you want using the database, making this system more expensive for larger organizations.

Unlimited technical support and customer support are free via email or via a database of help topics, video demos showing how to perform common tasks, and online help inquiries. Phone support is not offered, which might result in delays for complicated problems.

Also Consider

There are many more standalone tools offered as hosted products. Some free ones include **Volunteer Spot** (www.volunteerspot.com) and **BigTent** (www.bigtent.com). If you're willing to spend a little bit more money, consider **Volunteer Impact** (www.volunteer2.com), **Volunteer Builder** (www.ptotoday.com), or **Volunteer Scheduler Pro** (www.rotundasoftware.com). For about the same annual cost as Volgistics, **VolunteerMatters** (www.volunteermatters.com) is available through **TechSoup** (http://bit.ly/dMZKON), or consider **Shiftboard** (www.shiftboard.com) or **eTeamBuilder** (www.eteambuilder.org).

Volunteer Reporter, by Volunteer Software

This Windows-only product provides solid tracking ability in an installed package, with a slightly dated but familiar interface. Out-of-the-box integration with Microsoft Office enables strong printing functionality, but this older system offers only simple emailing features. The optional web interface requires knowledge of HTML to implement, and offers relatively few features for the price tag. If online functionality is a low priority, Volunteer Reporter is one of the more affordable options in this report, as a single copy of this software (just under $700) can be networked to your entire office.

Volunteer Reporter is a Windows-only program, compatible with Windows 95 and later. The interface looks and feels a little dated, and the design—which includes fixed-sized tabs and buttons, and some abbreviated labels—makes it less than user-friendly. The vendor provides a host of free resources on its website to clearly explain the interface.

The current iteration of Volunteer Reporter evolved from RSVP Reporter, which was specifically designed to track and manage retiree and senior volunteer programs under the Corporation for National and Community Service's SeniorCorps program. While no longer so specific, the software can be quickly configured for RSVP with a single click.

Volunteer Reporter records and tracks volunteers very well. Volunteer profiles are thorough and allow for customized fields to track additional fields (included as "Reference Codes"). The system also tracks volunteer skills rather well, and includes a long and diverse list of possible skills pre-loaded into the system, which can save setup time. Volunteer information is easily accessible through many pre-built reports, or by building custom reports.

It's also strong at tracking reimbursable expenses for volunteers, including miles driven, meals eaten and other out-of-pocket expenses, and offers a robust ability to create mailing labels, letters and other printed materials thanks to a strong integration with Microsoft Office.   However, it has very limited ability to send emails to more than one person at a time out of the system.

Volunteer Reporter lacks the online abilities of newer, web-based software for volunteers to interact with the system online; the optional Web Assistant must be purchased at additional cost. Volunteers can register, search for jobs, enter timesheet hours and send and receive messages online. However, each of these four functions is provided as a single standalone webpage which must each be linked individually to your website, and these pages cannot be significantly customized to match your organization's web site. It is unclear how quickly any online changes are reflected in your installed database, or whether a manual process is required to sync up the online and offline versions.

A single copy of the software costs $695. It can be networked to every computer in your office for free, but if you have multiple locations, each network will need its own copy. Optional unlimited toll-free tech support costs $300 per year, and the first year is free. The website provides detailed videos that explain most of the features and a few common issues for free. The optional Web Assistant module costs $360 per year, but requires a tech support subscription. For instance, a single office networking the software, with the Web Assistant module, would expect to pay a $695 one-time price, plus a total of $660 per year after the first year. For organizations with a public volunteer location, the optional Touch Screen Assistant module enables a touch-screen PC interface for volunteers to clock in and out for a one-time $500 cost.

Also Consider

There are many other installed options for volunteer management, often with additional online content. **VSysOne** (www.bespoke.com) is similar to Volunteer, with a more self-explanatory interface, but limited to Microsoft operating systems. Another installed option is **Rovir** (www.rovirinfo.com). Free installed tools are also available, including **Volcentre** (www.original-software.com/volcentre.php), **Son of Service** (sos.sourceforge.net), and the **Volunteer Management System** (www.volunteer-database.com), a modification to MS Access.

REVIEWS: CONSOLIDATED SYSTEMS

DonorPerfect, by SofterWare

DonorPerfect is best known as a very customizable donor management system with strong reporting and communications options, but could also handle the tracking needs of organizations with a small- to mid-sized number of volunteers. The convenience of keeping donors and volunteers in the same database is offset by the lack of a real scheduling system or the ability to manage volunteer projects in a substantial way.

DonorPerfect allows you to track volunteer-specific information like skills, interests and availability through the same profile used to track donor information—eliminating duplicate records for volunteers who donate and donors who volunteer. While any other information you may need, like reimbursable expenses or volunteer accomplishments or awards, is available through custom fields, basic volunteer fields, such as interests and availability, come out-of-the-box.

The vendor configures the system for each customer, which means you can start using the system without having to create all the custom fields yourself. Custom fields can appear on almost any screen in the system, and are available for querying and reporting, making it possible to adapt the system to support your own workflow.

Unlike a standalone volunteer manager, DonorPerfect lacks a significant scheduling function. Instead, an experienced user creates a custom query to find donors/volunteers that match a job by interest, skill or availability. This work-around may prove confusing to a novice user. Dates and hours of volunteer activity are tracked through custom fields on each donor's record, or can be added in bulk through an upload from Excel.

DonorPerfect provides strong communication features for keeping in touch with your constituents. Blast emailing is powerful and easy to use through integration with Constant Contact. While the integration is free, you'll still need to pay Constant Contact's fees. For Windows users, internal mail-merges through Internet Explorer and Microsoft Word make print communication simple and streamlined. (If you're using a Mac, or accessing the database through a different browser, you have to export the data to Excel and use that file for the mail merge in Word.)

The included Weblink feature allows your organization to create registration forms for volunteers to enter or update their profiles, including contact info, interests and availability, but does not enable them to enter hours-worked or to schedule themselves for projects. The forms can be customized and branded to your website.

A novice user may have a learning curve with DonorPerfect, but experienced power users will like the robust reporting and querying. Users will also find the SmartActions to be a convenient feature—they can be defined to appear on a donor's profile based on certain criteria. For instance, the alerts can be customized to indicate missing requirements for a volunteer, or the total number of volunteer hours they have worked this year.

DonorPerfect is priced on a three-tier scale. The cheapest tier, at $48 per month, can handle up to 1,000 constituent records, allows a single concurrent user, and includes basic support. From there, the tiers increase in the support package, number of records and number of concurrent users, and can cost up to $403 per month. There is a setup fee, which includes a robust configuration of the system to your organization's needs; the cost can vary from organization to organization. DonorPerfect is also available at a discount through TechSoup at http://bit.ly/fix4EP.

Also Consider

Other hosted donor management systems that could be customized to handle volunteer management include Z2 System's **Neon** (www.z2systems.com). Neon offers strong tracking and is easy to customize. Several new options are also being released as add-ons to Salesforce.com. Groundwire and The Salesforce Foundation have created **Volunteers for Salesforce,** set to release in early 2011. Hands on Network has created **Hands on Connect** to replace its legacy systems **1-800-Volunteer** and **Hands on Technology.**

The Raiser's Edge(i)™, by Blackbaud

A robust, higher-end donor and constituent management system, The Raiser's Edge(i)™ is the most expensive software in this report, but it also has useful volunteer management functionality in the context of sophisticated donor management. It provides powerful communications and reporting features, as well as some useful online volunteer recruiting capabilities.

The Raisers Edge, newly offered primarily as a hosted system, is a powerful donor and constituent management system designed with more experienced users in mind. The existing constituent profile offers strong, thorough tracking, spread throughout multiple tabs.

Volunteer-specific information, such as hours worked, skills and interests, are included under the "volunteer" tab in the constituent profile. The checklist functionality of the "actions" tab allows your volunteer manager to set a list of criteria that volunteers must complete, which is easily queried. The custom field functionality, however, is limited—you can add custom fields, but they all must show up on a separate "attributes" tab. Novice users may find some features difficult to find, and should expect a bit of a learning curve, but power users will be perfectly at home.

The Raisers Edge has a fairly strong ability to create and manage multiple projects, volunteer opportunities and job sites, on par with most standalone volunteer management systems. Staff members can search and assign volunteers to opportunities based on available times, interests and skills, although it does not provide any automatic recommendations of volunteers for specific jobs. Staff members can enter time sheets for volunteers.

Volunteer tracking features are not as advanced as some of the standalone systems—for instance, it doesn't support the tracking of expense or mileage information, or let you create hierarchies of volunteers, without resorting to custom fields.

Raisers Edge offers a useful ability to recruit new volunteers through your organization's website, letting volunteers create their own profiles and enter their information, which is automatically reflected in the database. Your volunteers can also opt-in to opportunities from your website. Hours can be entered as a custom field from an online form, but it will be up to your staff to properly organize those hours into a time sheet. The online interface can be completely branded to match your website, using either HTML or the included WYSIWYG editor.

Raisers Edge provides very strong email and printed communication functionality, enabling mail merges through Microsoft Word. Broadcast emailing is available through the included Net Community interface, which equips users with powerful tools to track deliverability, how many people have opened the email and conversion rates, features rarely seen outside a dedicated broadcast emailing tool. The Raisers Edge also provides some of the strongest house-holding capabilities in this report, allowing constituent profiles to link to each other as easily defined relationships, or by address.

Users of the Raisers Edge also benefit from strong features that aren't specific to volunteers. The permissions settings are very strong, allowing your admin to provide view or edit access on a field-by-field basis. The system is also capable of automatically running data enrichment services on all constituent records—including volunteers—to verify contact information accuracy (addresses, phone numbers, deceased and email). The system also includes an easy-to-use prospect research tool called "The Giving Score" which scores each constituent record on their likelihood to give to an organization and their overall capacity to give.

The Raisers Edge is accessible cross-platform. Currently it is known to run both in Microsoft's Internet Explorer and Mozilla Firefox, and Blackbaud is testing it on other popular browsers, including Google Chrome.

The Raisers Edge is the most expensive tool included in this report, with startup costs of $5,500 and an annual fee of $1,300 for one concurrent user. Multiple people can use the same login, but only one can use the system at a time. Prices for additional users are offered on a sliding scale. The annual fee includes software upgrades, access to complete customer support (self-serve, peer, live phone and chat) and web-based training to help your staff learn the system faster.

Also Consider

For another strong, higher-end donor management system that can handle volunteer management for mid-sized to larger organizations, **Talisma Fundraising** (formerly Donor2) (www.talisma.com) includes a volunteer management module, adding scheduling functions to the system's existing tracking and reporting. Also consider **PledgeMaker** from Softrek (www.pledgemaker.com).

Volunteers for GiftWorks, by Mission Research

An optional module for the GiftWorks donor management system, Volunteers for GiftWorks adds robust scheduling and volunteer management to the existing friendly interface for donor tracking, along with reporting and household management. While GiftWorks provides little ability for volunteers to schedule themselves or enter hours online, it provides strong functionality for printed communication, enabling mail merges, letters and mailing labels through the built-in editor.

Volunteers for GiftWorks takes all the existing contact information and tracking fields from the standard GiftWorks donor profile and adds volunteer timesheets, availability and skills. As the system is very donor focused, however, everyone must first be entered as a "donor" before you can enter volunteer info for them.

Overall, the GiftWorks interface is friendly and easy for new or novice users to use. Menus and tabs are intuitively labeled, and navigation between modules is accomplished through the large, descriptive buttons on the overhead menu bar. The Smartlist functionality makes it easy to create and reuse queries. Basic processes and multi-step operations are easy to understand, but experienced or power users may find the system time-consuming, as it's designed more for novices than for speed. It's strong in print mail-merges, but has very limited ability to send emails to more than one person at a time out of the system.

In order to track volunteers' skills and interest tracking, you can choose from a long, existing list of categories, or add or remove options to tailor the list for your own organization. It's fast and easy to set up new volunteer jobs or "projects."

GiftWorks offers surprisingly robust scheduling functionality—as strong, in fact, as any of the standalone volunteer management systems. It automatically shows a selection of volunteers for a job, or jobs for a volunteer, matching by hours of availability and skills. GiftWorks also makes assigning a manager to either a particular job or to groups of volunteers straightforward. Tracking geographic locations is mostly unsupported, however. As a workaround, you could add the geographic location as a skill (i.e. "lives in Harrison County"), which could then be used in automatic matching.

GiftWorks doesn't have strong online functionality for volunteers. The optional Web Collect module allows for basic online recruiting, but it's restricted to only about 10 fields for volunteer input. It doesn't provide any substantial functionality for volunteers to manage their own schedules or enter their hours. You can, however, completely customize the appearance through HTML.

GiftWorks comes either hosted or installed. If your organization already has GiftWorks Standard or Premium installed, you can add Volunteers for GiftWorks for $199 for one license, and $149 for additional licenses. GiftWorks Standard costs $499 for one license, and goes up from there. The hosted option, GiftWorks Anywhere, includes all the standard and premium features, in addition to Volunteers, the Events module and full technical support, and has a monthly fee of $75 per user per month, or $900 per year. The Web Collect add-on is $14.99 per month, or $180 a year. GiftWorks is also available at a discount for organizations with an annual budget of less than $50,000 through TechSoup at http://bit.ly/eGjMre

Also Consider

Sage Fundraising 50 is another installed system with reasonable support for volunteer tracking, at a somewhat higher price point. Many donor management systems will let you track useful volunteer information, at least through custom fields.

METHODOLOGY

In February 2011, Idealware conducted telephone interviews with five participants to investigate the primary factors important to nonprofits when choosing volunteer management software, as well as the leading software on the market. Three of our interviewees were consultants who help nonprofits and volunteer organizations select these systems, and two were nonprofit volunteer coordinators who had evaluated some of these systems for their own use. We also researched volunteer management systems on the CyberVPM email discussion list and other websites.

Using this data, we identified the key factors that are often important in selecting a system, and assembled a list both of standalone systems and larger constituent management systems that our participants felt were representative of the overall market. From these key factors, we created a vendor list, a preliminary checklist, and a numeric ranking system for evaluating the software.

We then conducted half-hour vendor demos of the three standalone systems and the three larger constituent management systems that our research showed to be representative of the space. Each vendor was sent a basic outline of what features and functions we wanted to cover to investigate the factors most often identified as important, as well as several optional or wish-list features that our interviewees had suggested as "deal-breakers."

Two of the vendors declined the live demo, and instead directed us to recorded demonstrations on their respective websites. Based on these reviews, we wrote up a detailed review of each system, highlighting strengths and weaknesses in regard to the general features and functions. These reviews were sent to the vendor to identify any inaccuracies, but vendors did not have final approval over the content.

ABOUT THE AUTHORS & CONTRIBUTORS

Kyle Andrei, Research Intern, Idealware

Kyle is a senior at Indiana State University, where he studies Communication. He decided to travel up to Maine to spend his last semester in a research internship, helping Idealware with social media research and support of their day-to-day work. Prior to joining Idealware, Kyle split his time between managing the student radio station, researching video game communication, and working on local elections.

Chris Bernard, Senior Editor

Chris is a longtime freelance writer. Prior to joining Idealware, he worked as a newspaper, magazine and public radio journalist and managing editor, as senior copywriter at an advertising agency, as a corporate marketing and communications specialist, and as a technical writer. He also wrote a travel book about bicycling in New England.

Jay Leslie, Senior Researcher, Idealware

As Senior Researcher at Idealware, Jay is responsible for researching software choices through demos, interviews and surveys, and using that information to create easy-to-use resources. He brings to his role 15 years of experience in information technology management in the nonprofit and philanthropic sectors. Prior to Idealware, Jay was an IT executive at the Atlantic Philanthropies, where he led several major software selection and implementation projects. Jay has a strong interest in technological change and its impact on organizations and society.

Laura Quinn, Executive Director, Idealware

Laura has been working in the software sector for more than 15 years. As Idealware's Executive Director, she directs Idealware's research and writing to provide candid reports and articles about nonprofit software. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software, designed interfaces and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

Other Contributors

We'd also like to thank all those who contributed to this report in interviews or other capacities, including:
- Jayne Cravens, Coyote Communications
- Kim Toulouse, Nevada Department of Wildlife
- Steve Beshuk, JCA
- Eric Leland, FivePaths
- Rochelle Runge, Maine Commission for Community Service

Cover Photos

Holy Apostles Soup Kitchen by U.S. Navy, photo by Mass Communication Specialist 1st Class Robert Keilman; Seniors teach spanish at Ripley House, by Neighborhood Centers; SMASH! Volunteer Training by Smashcon; Green Gym Volunteers by Scottish Government.

ABOUT US

About Idealware

Idealware helps nonprofits make smart software decisions by synthesizing vast amounts of original research and information into thorough, approachable resources that make even the smallest organizations feel confident in taking the next step in their software selection process. We provide a trusted and authoritative online guide to nonprofit software including scrupulously researched in-depth reports, an online training library, and many articles and case studies—for free—through our website, www.idealware.org. We also partner with organizations to develop customized training and research to benefit entire networks of nonprofits.

About TechSoup

TechSoup is a nonprofit with a clear focus: providing other nonprofits and libraries with technology that empowers them to fulfill their missions and serve their communities. As part of that goal, we provide technology products and information geared specifically to the unique challenges faced by nonprofits and libraries. Learning resources, including articles, blogs, free webinars, and forums led by expert hosts are available to all users through our website, www.techsoup.org.

FOR MORE INFORMATION

Wild Apricot

Volunteer Scheduling, Time Tracking and Accountability

http://www.wildapricot.com/blogs/newsblog/archive/2011/03/18/volunteer-scheduling-time-tracking-accountability.aspx

New blog post listing several free volunteer management solutions.

CyberVPM

Networking for Volunteer Managers

http://groups.yahoo.com/group/cybervpm/

International discussion group for volunteer managers.

Coyote Communications

List of Volunteer Management Software

http://www.coyotecommunications.com/tech/volmanage.html

Jayne Craven's extensive list of software packages—both standalone and consolidated—that can help to manage volunteers.

TechSoup

Working with Technical Volunteers

http://www.techsoup.org/learningcenter/volunteers/page11651.cfm
A downloadable guide to identify areas where tech volunteers can help, and then recruit and manage technical volunteers.

Volunteers and Technology Forum

http://forums.techsoup.org/cs/community/f/22.aspx
Experts answer questions about working with technology volunteers and using the Internet to connect volunteers with organizations.

Four Tech Tools to Help Manage Your Staff and Volunteers

http://blog.techsoup.org/node/1369

Blog post covering volunteer and time tracking tools.