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Your complete guide to understanding RFPs for volunteer organisations

Breaking down the elements of a good Request for Proposal, so you get the right volunteer management system for your needs.

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So what is an RFP exactly?

Moving to a volunteer management system (VMS) for the first time is a big step for any organisation. With so many options out there, it can be difficult to know where to start. That's where an RFP comes in.

If you're dipping your toe into VMS waters for the first time, you may have heard the term RFP bandied about. It stands for Request for Proposal: a document that sets out the features, functions and scope you need from a VMS, so providers can respond with a proposal that fits.

Putting together a well-considered RFP will help your organisation get a VMS that meets its requirements and can evolve with your needs over time, without paying for functionality you don't need.

Establishing a clear path forward

A good RFP acts like a roadmap, helping both your organisation and potential software providers get clear on what's needed, what's nice to have and what success looks like after implementation.

It's about setting yourself up for a smooth selection process, and ultimately choosing a VMS that's well suited to your requirements.

In this guide, we'll walk you through the RFP development process, covering:

- What your RFP should include
- The project considerations to plan for (not just software features)
- Tips for working with platform providers like Rosterfy



The benefits of a good RFP

Your RFP will become the single source of truth for your organisation and any platform providers you start talking to.

If you've never written an RFP before, don't stress. Many volunteer managers have built their careers through hands-on experience, not through procurement processes.

While it may seem a little daunting, creating an RFP is quite a straightforward process. Working through each step will help you articulate what matters most in your VMS.

A good RFP will deliver:

Clarity

It helps your whole team (and leadership) agree on what's needed.

Consistency

It lets providers know exactly what you're looking for.

Comparison

It makes it easier to compare different solutions and prices.

Confidence

It saves you from costly mistakes by making sure you don't miss critical requirements.

In short, putting the work into your RFP upfront will save a lot of time and confusion later on.



01 Organisation overview

Start by telling providers who you are. A short, clear overview helps them understand your context and tailor their response, rather than sending a generic pitch. Include:

- Your mission and the communities you serve
- The size and shape of your volunteer program: how many volunteers you have, the types of roles, your locations, and whether volunteering is ongoing, seasonal or event-based
- How you manage volunteers today, whether that's spreadsheets, forms and email, or an existing system
- What's prompting the change, and the goals you want a new system to help you reach

Keep it to a page or less. Providers need enough to understand your world, not your full annual report.

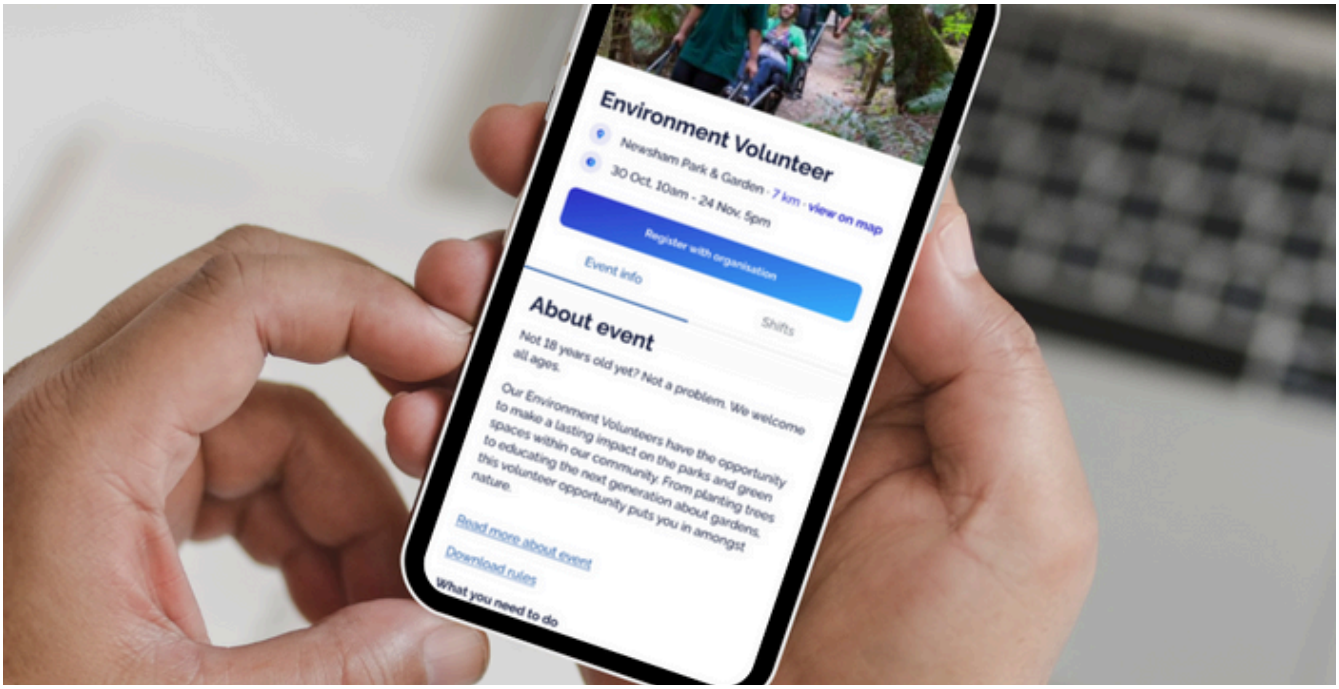


02 Project scope and timeline

Next, set out what's in scope and when you need it. This keeps everyone working to the same expectations and gives providers what they need to plan their response and resourcing. Cover:

- Which teams, programs or locations the system will support at launch, and any you plan to add later
- Key dates: when the RFP closes, when you'll shortlist, when demos will run, when you'll make a decision and your target go-live date
- Any fixed deadlines you're working towards, such as a major event, a peak season or the end of a contract with your current system
- Who will be involved in the decision, and who providers should contact with questions

Build in realistic time for implementation. If you need to go live before a key event, work backwards from that date and leave room for setup, training and testing.



03 Budget expectations

It's helpful to share a ballpark figure if you can. This gives providers a realistic sense of which solutions are viable for you.

Ultimately, much of the value of a VMS will come from automating manual tasks, which drives internal cost savings and improves productivity. So set your budget in line with the savings you're looking to create, not just the upfront cost of a system.

Rosterfy can help here

We can provide projected cost savings based on benchmarking against similar clients.



04 Critical functionality requirements

This is where you drill down into the specific tools that will drive the most value for your organisation. Identify your current weak spots and where you have the most to gain. Ask yourself:

What are the must-haves for the system?

What features would be nice to have?

What features do you definitely not need?

Break down the specific functions of your organisation and identify where good technology can improve your efficiency and effectiveness. Here are the most common VMS features to consider:

- Volunteer recruitment and onboarding
- Scheduling and shift management
- Mobile app access for volunteers
- Event, program and campaign management
- Volunteer engagement tools, including certificates and reward and recognition platforms
- Volunteer training and credential tracking
- Communication tools (email, SMS)
- Automation of administrative tasks
- Reporting and analytics
- Privacy and security compliance

Need help?

Rosterfy's team consists of volunteer management specialists who are experienced in working alongside some of the world's leading volunteer programs.

If it helps to talk through your RFP in advance, book a time with our team. We'd be happy to help.

Book a time

05 Onboarding, support and training

A VMS only adds value if your team knows how to use it well. So beyond the system itself, it's important to get the implementation side right.

You'll want a provider that's known for great support and has a clear process for getting your team up to speed quickly. In your RFP, ask providers to outline:

- Their onboarding and setup process
- Training options for your team
- Ongoing support availability (live chat, email, phone)
- How they help users after launch

06 Data transition and management

If you're moving from spreadsheets or a legacy system, make sure you understand who's responsible on both sides for making the transition a success. Make sure your RFP covers:

- Data migration assistance
- Data security and privacy protocols
- User permissions and access levels



07 Integration with other systems

Your organisation is likely running a range of other software, such as fundraising systems, HR platforms and accounting tools. Many of these will need to integrate with your VMS, so detail these requirements in your RFP:

- Which integrations the VMS supports natively
- Which specific integrations are required as part of the project
- How custom integrations are handled if needed

Connect with your favourite tools

Rosterfy's 50+ integrations let you connect your volunteer program to key business tools for seamless, secure data transfer, to accredited screening and learning management systems for compliance, and to tools that maximise engagement and productivity.



Explore our integrations

08 Vendor questions

There may be additional questions or requests that don't fit neatly into the categories above. This is where you can ask for specific answers. Some examples include:

- Case studies from similar types of organisations
- Product demos using a sample of your real data
- How customisation requests are managed and supported
- Details of the platform's future development roadmap

09 Evaluation criteria

Finally, be clear on how you'll assess the proposals. Outline the criteria you'll use to evaluate the platforms you're reviewing. Common criteria include:

- Cost: today's scope and likely future scope
- Alignment with your must-have features
- Experience working with similar organisations
- Quality of support and training offered
- Client references and case studies



Working collaboratively with your platform provider

Think of your RFP as the first step in creating a great partnership. It's not just a document. It's a conversation starter and idea generator. Leading providers like Rosterfy will work with you to:

- **Validate your requirements**
- **Suggest new ways of doing things**
- **Highlight features you might not have thought of**
- **Plan an onboarding journey that works for your volunteers and team**

It's OK for your initial RFP to evolve as you learn more about what different platforms can do and explore ideas for applying them to your specific needs.

At Rosterfy, there's nothing we enjoy more than helping our clients along this journey so they get the best possible outcome.

Final tips for success

By putting plenty of thought into your RFP, you'll set your organisation up for the best possible outcome. Here are five final tips to guide you through the process:

1. Keep it simple and focused. It doesn't need to be a 40-page document.
2. Prioritise needs over wants to keep things realistic.
3. Set clear timelines and expectations for providers.
4. Be open to collaboration and suggestions.
5. Trust your instincts. The right partner will feel like a natural fit.

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RFP template for volunteer management systems

Here's a quick and easy structure you can use as a starting point when drafting your RFP:

RFP SECTION	WHAT TO INCLUDE
1. Organisation overview	Who you are, your mission and your goals
2. Project scope and timeline	Key dates for proposals, reviews, selection and delivery
3. Budget	Estimated project budget
4. Key requirements	Must-haves and nice-to-haves
5. Onboarding, training and support	Your requirements and expectations
6. Data migration	Data migration requirements and security expectations
7. Integrations	Existing and new systems the VMS must connect to
8. Vendor questions	Reference requests, previous project examples and demo requests
9. Evaluation criteria	How you will choose the winning proposal

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Get the template

About Rosterfy

Rosterfy is a leading volunteer management software provider, dedicated to helping organisations streamline their volunteer programs and maximise engagement.

Trusted by nonprofits, hospitals, healthcare charities, sports organisations and major events worldwide, Rosterfy offers powerful solutions for managing volunteers efficiently.

Having already powered over 180 million volunteer hours worldwide and operating in 77 countries, Rosterfy is redefining how organisations create engaging experiences for volunteers, ensure compliance and gain insights into their program.

Rosterfy on average saves customers 50% of their time by replacing manual processes with automations.

From automating volunteer onboarding (including reminders, updates and training prompts) through to auto-scheduling based on volunteers' skills, preferences and availability, Rosterfy's automation engine helps you deliver a great experience for every volunteer.

Get in touch

Whether you're drafting an RFP or have just completed one, we'd love to hear from you. Book a time with our team to learn more about Rosterfy.

Book a time www.rosterfy.com



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