



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.

[Access your free RFP template to help you get started.](#)



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', which is basically an acronym for outlining the specific features, functions and scope of the VMS platform you require.

Putting together a well-considered RFP will ensure your organisation gets a VMS that meets its requirements and can evolve with your needs over time — without paying for additional functionality you don't require.

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 after implementation looks like.

It's about setting yourself up for a smooth selection process — and ultimately getting a VMS that's perfectly suited to your requirements.

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

- **What your RFP should include**
- **What the project considerations are (not just software features)**
- **Tips for working with platform providers like Rosterfy**

The benefits of a good RFP

Your RFP will essentially 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, it's quite a straightforward process to create an RFP. 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 vendors 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 — 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.

[Download your free RFP template now to help you get started.](#)



3. Budget expectations

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

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

Rosterfy can assist in this area — we can provide projected cost savings based on benchmarking against similar clients.



Need help?

Rosterfy's team consist of Volunteer Management Specialists, who are experienced working alongside some of the world's leading volunteer programs.

If it helps to talk about your RFP in advance, book some time in to talk to our team. We'd be happy to help!

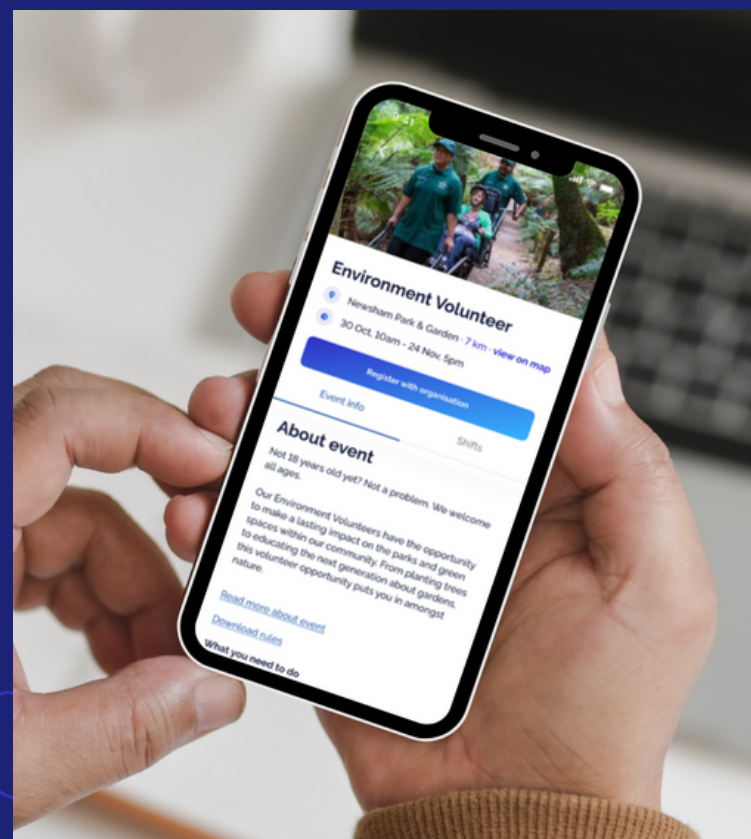
4. Critical functionality requirements

This is where you drill down into the specific tools that will drive the most value for your organisation. Identify what your current weak spots are 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 Nonprofit and identify where good technology solutions can improve your efficiency and effectiveness. Here is a list of the most common VMS features to consider:

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





5. Onboarding, support and training

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

It goes without saying that you'll want to choose a provider that is known for great support and will have a clear process for getting your team up to speed quickly. In the 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 post-launch

6. Data transition and management

If you're transitioning from spreadsheets or an old legacy system, you'll want to make sure you understand who's responsible on both sides for making the transition successful. Make sure your RFP covers:

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

7. Integration with other systems

It's likely your organisation will be running a range of other software such as fundraising systems, HR platforms, and accounting tools. Many of these will require integration with your VMS. So detail these requirements in your RFP:

- What integrations the VMS natively supports
- What 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** allow your organisation to connect your volunteer program to key business tools to provide seamless and secure transfer of data, accredited screening and learning management systems to ensure compliance as well as tools to maximise engagement and productivity.

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8. Vendor questions

There may be additional questions or requests that do not fit neatly into any of the above categories. This is where you can seek specific answers to these. Some examples include:

- **Requests for case studies with similar types of organisations**
- **Product demos using a sample of real data**
- **Clarification on how customisation requests are managed and supported**
- **Details on the future development roadmap for the platform**

9. Evaluation Criteria

Finally, be clear on how you'll assess the proposals. Outline the criteria you'll be working to for evaluation of the platforms you're reviewing. Some 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 the capabilities of different platforms and explore ideas for applying them to your specific needs.

At Rosterfy, there is 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 up your organisation for the best outcome possible. Here are five final tips to guide you through the process.:

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



RFP Template for Volunteer Management Systems

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

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

[Download your free RFP template here to help you get started.](#)

About Rosterfy



Rosterfy is the 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.

Get in touch

Whether you are drafting an RFP or have just completed one, we'd love to hear from you.

[Book some time in to speak to our team to learn more about Rosterfy in detail.](#)

Having already powered over 100 million volunteer hours worldwide and operating in 35 countries, Rosterfy is redefining how organisations create engaging experiences for volunteers, ensure compliance and provide insights into their program.

Utilised by some of the world's leading volunteer programs including **British Heart Foundation**, **The Super Bowl**, **City of London**, **SXSW** and many more, Rosterfy on average saves customers 50% of their time by replacing manual processes with automations.

From automating volunteers onboarding including reminders, updates and training prompts through to auto scheduling based on volunteers skills, preferences and availability, Rosterfy's comprehensive automation engine ensures a world class experience for your volunteers.

www.rosterfy.com

