
Beyond the CRM: Why Health and Cause-Led Charities Need a Purpose-Built Volunteer Management Solution

How pairing your CRM with a dedicated volunteer management solution turns coordinator time from a constraint into a competitive advantage.

CRM

VMS

Abstract

Health and cause-led charities have invested heavily in CRM platforms to manage donors and supporters, yet volunteer coordinators are often still weighed down by manual administration that CRMs were never designed to manage.

As coordinator capacity increasingly limits an organisation's ability to scale service delivery, a CRM alone is no longer enough. While it provides a valuable source of relationship data, a purpose-built volunteer management solution manages the operational workload, from onboarding and compliance to scheduling and recognition. Working together, the two systems enable volunteer programs to grow without requiring a corresponding increase in administrative headcount.



THE QUESTION THIS PAPER ANSWERS

Is coordinator time the real constraint on how far your volunteer program can grow, and is your CRM the thing being asked to fix it?



Executive Summary

01 Volunteer growth is creating a capacity challenge

For many health and cause-led charities, finding volunteers isn't the only challenge. It's having enough coordinator time to manage them. As demand for services grows without the same growth in headcount, reducing volunteer admin is becoming more than an operational issue. It's a question of how organisations can grow their impact with the resources they already have.

02 CRM-native volunteer tools solve donor management, not volunteer operations.

Platforms like Salesforce's Nonprofit Success Pack and Blackbaud's donor-management suite are genuinely strong at fundraising, donor stewardship, and reporting. Volunteer coordination is a secondary feature bolted onto that core, not a purpose-built operational system.

03 The proof already exists at scale.

British Heart Foundation cut volunteer-program admin by roughly half after pairing its CRM with a dedicated volunteer management platform, freeing coordinator time for volunteer experience rather than paperwork.

04 CRM and VMS integration is becoming the expectation.

More tender processes are treating CRM and volunteer management integration as a core requirement rather than a nice-to-have. It's a clear sign that organisations increasingly expect the two systems to work together.

CRM vs. Volunteer Management Solution, at a Glance

Before the argument below, here's the short version: a CRM and a volunteer management solution aren't competing for the same job. One runs donor relationships; the other runs the volunteer lifecycle. The friction most health and cause-led charities hit is trying to make the first one do the second one's job.

CATEGORY	CRM (E.G., SALESFORCE NPSP, BLACKBAUD)	VOLUNTEER MANAGEMENT SOLUTION (E.G., ROSTERFY)
Primary job to be done	Manage donor and supporter relationships	Manage the day-to-day volunteer lifecycle
Core data captured	Donations, campaign engagement, contact history	Shifts, hours, screening status, certifications
Volunteer scheduling & rostering	Not built for this	Core function
Screening & compliance (background checks, WWCC)	Manual or add-on	Centralized and auditable
Training & onboarding modules	Not built for this	Configurable modules, quizzes, benchmarks
Self-service volunteer portal	Rare or limited	Standard
Reward & recognition workflows	Not built for this	Automated, hours-based
Board & fundraising reporting	Core strength	Feeds volunteer-impact data back into CRM reporting

The Shift Nobody Budgeted For



Most health and cause-led charities didn't choose a CRM because they expected it to run their volunteer program. They chose it to manage donors, track fundraising campaigns, and report to the board.

That's still the right function of a CRM. But the same organizations are now being asked to deliver more volunteer-dependent services with a coordinator headcount that hasn't grown to match, and cost-of-living pressure is only widening that gap: demand for charitable services is climbing at the same time staffing budgets are being held flat or cut.

THE CAPACITY CONSTRAINT

The average volunteer coordinator at a mid-sized nonprofit spends around 22 hours a week on administration, including scheduling, confirmations, following up no-shows, tracking hours and reporting.¹ That's more than half a working week spent on tasks that don't involve directly engaging volunteers.

22

HOURS A WEEK ON
ADMIN

And that workload only grows as volunteer numbers increase. Processes that work with a spreadsheet and an inbox for a small program quickly become difficult to manage at scale. The answer isn't necessarily more headcount. It's automating the repetitive work that a CRM wasn't designed to handle.

SOURCES

1. Nonprofit Times 2025 staffing survey, as reported in 2026 industry analysis

What Your CRM Was Actually Built to Do

Where a CRM is strong

CRM platforms play an important role in a charity's tech stack. They're built to manage donor and supporter relationships, track giving history, run fundraising campaigns and give teams a central view of engagement. Salesforce and Blackbaud are both widely used for exactly that reason.

Where it can fall short

Where a CRM can fall short is the day-to-day management of volunteers. While many offer volunteer tracking, it's typically one part of a much broader platform rather than the core focus. For organisations managing complex onboarding, screening, compliance, scheduling and recognition, that can leave important operational gaps.

QUESTION: HOW CAN YOUR CRM & VMS WORK TOGETHER?

That's why the conversation doesn't need to be CRM or volunteer management software. Increasingly, it's about how the two work together, with the CRM managing the broader supporter relationship and a dedicated VMS managing the volunteer experience and operational workflows.



What a Purpose-Built Volunteer Management Solution Adds

A dedicated volunteer management solution isn't a replacement for the CRM. It's the operational layer that syncs with it.

Five capabilities matter most for a federated, compliance-heavy health charity evaluating one:



Integrations: two-way sync with the existing CRM (and adjacent tools like DocuSign or background-check providers) so volunteer and donor data update automatically, without double-handling.



Volunteer portals: a self-service account volunteers use to update documentation, apply for shifts, and access training and certificates, ideally usable across multiple programs or events from a single sign-up.



Screening and compliance: centralized, auditable tracking of background checks, reference checks, and documentation such as safeguarding or working-with-children clearances, instead of a manual, site-by-site process.



Training and onboarding: configurable modules, quizzes, and interview scheduling that get a volunteer from application to cleared-to-work without a coordinator chasing every step by hand.



Reward and recognition: automated tracking of hours and milestones that lets an organization recognize volunteers consistently, which the sector's own research increasingly ties to retention.

Individually, none of these tasks is particularly demanding. Together, they create hours of repetitive admin. Automation is what changes that, taking care of routine tasks and follow-ups so coordinators can spend less time managing spreadsheets and more time managing and engaging volunteers.

Proof at Scale: Federated Health Charities Running Both

British Heart Foundation paired its existing CRM with Rosterfy to automate more of its day-to-day volunteer management, cutting administrative work by around 50%. With less time spent on manual processes, the team could focus more on supporting and engaging volunteers. The impact goes beyond efficiency: a better-supported volunteer is more likely to stay engaged, return and ultimately contribute more to the organisation's mission.



British Heart Foundation reduced volunteer-program admin by approximately 50%.

SOURCE: ROSTERFY CUSTOMER DATA

[READ THE CASE STUDY](#)

~50%

LESS VOLUNTEER-
PROGRAM ADMIN



Implementation Guidance

Enterprise

For federated organisations managing multiple centres, regions or state networks, a phased rollout is often the best approach. Plan how data will sync between your CRM and VMS, onboard teams or locations in stages, and involve IT and CIO stakeholders early, particularly where compliance and data management are involved.

Mid-Market

For smaller or single-network organisations, it often makes sense to start small. Begin with your busiest program or largest volunteer group, demonstrate the time savings, then expand the integration as your team becomes familiar with the new workflows.



Methodology and Sourcing

Proprietary figures in this paper are drawn from Rosterfy's own customer data and named account records. External figures are drawn from named, dated third-party industry research as cited inline, and are presented as reported by that source rather than independently verified by Rosterfy. This paper does not include or imply proof points from Cancer Research UK, which is not a Rosterfy reference account.

Next Steps

If your organization is running a CRM alongside a volunteer program that's outgrown spreadsheets and manual tracking, the next step is a discovery call to map your current CRM's volunteer-data fields against Rosterfy's operational workflow and to see what the integration would actually look like for your specific center or network structure.



Map your CRM against the volunteer workflow.

Book a discovery call and bring your current CRM setup and volunteer onboarding process.

[BOOK A DISCOVERY CALL](#)

About Rosterfy

Rosterfy exists to connect millions of people to events and causes they're passionate about through volunteer and paid workforce management technology. Founded in Melbourne in 2014, Rosterfy now operates in 35 countries from eight offices worldwide, with a platform available in nine languages and hosting across Australia, the UK, the EU, the US, and Canada. Rosterfy's end-to-end technology allows charities, events, and organizations to recruit, register, screen, train, manage, and report on volunteers with ease — replacing manual processes with automation to better engage and retain volunteers and paid staff alike.

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