
How to Choose Volunteer Management Software

A practical guide to finding the right volunteer management software for your needs, budget and team.

[EVALUATION CRITERIA](#)[VENDOR EVALUATION TEMPLATE](#)[QUESTIONS FOR VENDORS](#)

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Introduction

Choosing the wrong volunteer management software is an expensive, disruptive mistake. One that shows up less in the invoice and more in the volunteers who quietly stop showing up because the new system made things harder, not easier. Choosing the right one frees your team from admin so they can spend their time on the part of the job that actually matters.

This guide walks through a clear, vendor-neutral process for making that decision with confidence including:

- A volunteer needs assessment
- A real evaluation framework
- The true cost of ownership
- And the questions worth asking every vendor before you sign.



UPFRONT ABOUT THE BIAS

We're a volunteer management software provider, so we understand you might question how impartial this guide can be. That's why we've kept it practical and honest. The goal is to help you find the right fit for your volunteer program, even when that means choosing a simpler solution.

Start with the problem, not the product

Before you look at a single vendor, work out what your program actually needs. Involve your volunteer coordinators, IT team and volunteers themselves - each sees different requirements. Map your current bottlenecks and your program's size and structure, then sort requirements into must-have, should-have and could-have before you ever open a comparison spreadsheet.

WHO TO INVOLVE, AND WHY IT CHANGES THE REQUIREMENTS

Volunteer coordinators

Day-to-day workflow reality: what's actually slow, what's held together by workarounds.

IT / data teams

Integration, hosting and security requirements a coordinator might not think to raise.

Leadership

Reporting requirements for the board, funders or council. Compliance is also a key consideration for executives.

Volunteers themselves

Consider the entire volunteer experience, from applying and onboarding to getting scheduled. A platform that works for your coordinators but creates friction for volunteers will struggle to drive adoption.

DIAGNOSE YOUR CURRENT BOTTLENECKS

Manual data entry, multiple systems, email chains for scheduling, no-shows with no visibility, and reporting that has to be built by hand for grants or funders are the usual culprits worth mapping before you compare a single vendor.

CONSIDER YOUR PROGRAM'S STRUCTURE

A single site running a few hundred volunteers a year has a very different needs profile to a multi-region or multi-program operation running compliance-heavy volunteer bases across dozens of locations.

Prioritise before you compare

PRIORITISE WITH MUST / SHOULD / COULD (MOSCOW)

PRIORITY	WHAT IT MEANS	EXAMPLE
Must	The program can't run without it	Background-check tracking for a healthcare program
Should	Important, but workable without it in year one	Multi-language volunteer portal
Could	Nice to have, doesn't change the decision	Custom-branded certificates

The most common mistake here is putting everything in "must." If your list of must-haves looks like every feature on every vendor's homepage, go back through it. A shorter, prioritised list is what actually helps narrow your shortlist.

SECTION 02

The evaluation criteria that actually matter

Score every vendor on the same set of criteria: budget, features, who will use it, scalability, integrations, accessibility and compliance, and implementation and support. Score them a consistent way so you can compare vendors on the same terms you've already agreed matter most to your program.



This scorecard is completely ungated. Use it with your team, compare your options and make a more informed decision. No forms or contact details required.

Template vendor evaluation scorecard

VENDOR _____

DATE _____

CRITERION	WHAT TO ASK	COMMENTS
Budget & pricing model	Is pricing per-volunteer, tiered or flat-rate? Does it scale predictably as your program grows?	
Core features	Does it cover your must-haves from the needs assessment, not just its own feature list?	
Users: admins & volunteers	Is it usable by the actual people who'll run it day to day, not just the person buying it?	
Scalability	Can it handle your program in three years, not just today?	
Integrations	Does it connect to the CRM, payroll or event tools you already run?	
Accessibility & compliance	Does it meet the accessibility standards and data regulations that apply to your region and sector?	
Implementation & support	What does onboarding actually involve, and what happens when something breaks?	

Tip: photocopy or recreate this table for each vendor on your shortlist, fill in a score from 1–5 against each criterion, and total the columns. A consistent scoring pass beats a gut-feel decision almost every time.

Must-have vs. nice-to-have features

Core feature areas span recruitment and onboarding, scheduling, communications, hours tracking and reporting, a volunteer self-service app, automation, and reward and recognition. But what's a must-have versus nice-to-have depends entirely on your program's type and size. A small charity and a national federation should not end up with the same shortlist.

FEATURE AREA	SMALL / MEDIUM PROGRAM	LARGE / MULTI-SITE OR FEDERATED PROGRAM
Recruitment (registration forms, volunteer portals, website plugin)	Must	Must
Onboarding (automated onboarding journeys for multiple roles)	Should	Must
Scheduling / rostering (consider different levels of scheduling - manual vs automated, waitlists, emergencies, chat function etc)	Must	Must
Communications (email / SMS / app) (consider are these manual or automated)	Should	Must
Custom branding (is it important for your VMS to be an extension of your brand?)	Could	Should
Hours tracking & impact reporting (live dashboards, impact reporting, deep data insights on demand)	Should	Must (often board-reported)
Volunteer mobile app	Could	Should
Automation (consider level of automation - is it working in isolation or an end to end automated journey)	Should	Must
Reward & recognition (personalised certificates, built in reward & recognition)	Could	Should
Secure database / compliance controls (SSO, local data hosting, ISO2007 and SOC2 compliance)	Must if handling sensitive data	Must



TEST IT IN THE DEMO

Not every platform that claims automation delivers true end-to-end automation. Ask the vendor to run a real end-to-end scenario live in a demo – not describe it to you.

What it really costs: total cost of ownership

The subscription is only part of the cost. Total cost of ownership also includes data migration, implementation and configuration, staff training time, and the cost of scaling as you add users or features. Pricing models vary (per-volunteer, tiered or flat-rate) so compare on total cost over the contract term, not sticker price alone.

COST COMPONENTS TO BREAK OUT

01 Subscription / pricing model (per-volunteer, tiered, flat-rate)

02 Data migration from your current system or spreadsheets

03 Implementation and configuration

04 Staff training time

05 Cost of scaling – more users, more features, more regions

Reframe the budgeting conversation: size spend against the impact volunteers have on the organisation, rather than treating it as a pure cost line. This is a genuine return-on-investment conversation, not a savings pitch.

Pricing models vary widely between vendors, so use this as a framework for the questions to ask, not a set of numbers to expect – get an actual quote based on your program's size before comparing totals.



VMS vs. CRM vs. spreadsheets vs. HR systems

A CRM manages supporter and donor relationships; a volunteer management system manages the volunteer lifecycle: recruitment, scheduling, hours, communications. Many CRMs lack true volunteer functionality, which is why organisations often run both together rather than trying to force one tool to do both jobs.



Volunteer management system

Manages the volunteer lifecycle: recruitment, scheduling, hours, communications.

CRM

Manages supporter and donor relationships.
Many CRMs lack true volunteer functionality.

Spreadsheets and generic HR systems run into the same gap: they can track basic records, but they weren't built for the volunteer-specific workflows: shift scheduling, hours logging against impact reporting, background-check tracking, or a self-service portal volunteers actually use.

If your organisation is weighing a build-vs-buy decision, the same question applies: a general-purpose tool bent into shape usually costs more in workarounds than a purpose-built system costs in subscription.

Match the platform to your complexity, not its size

The right platform matches your program's complexity, not its size on paper. A simple, out-of-the-box tool is the right call when your workflows are straightforward and your reporting needs are basic. Enterprise-grade structure, compliance and scale become necessary once you're managing multi-site operations, regulatory requirements, or reporting obligations a simpler tool can't produce.

THREE DIAGNOSTIC QUESTIONS



Workflow complexity

Are you running one program in one location, or coordinating across sites, regions or partner organisations?



Administrative capacity

Does your team have time to manage a more complex platform, or do you need something that works well with minimal setup?



Reporting requirements

Do you need to report to a board, a funder, or a regulator in a specific format, or is a simple activity log enough?

BE HONEST WITH THE ANSWERS

Be genuinely even-handed with your own answers here. The goal isn't to justify the biggest platform on your shortlist — it's to avoid paying for complexity you don't need, or outgrowing a tool within a year of signing.



Questions to ask every vendor in a demo

Take a consistent list of questions into every vendor demo so you're comparing answers on the same terms: data security and hosting, onboarding and support model, the real extent of automation, integrations with your existing stack, accessibility, and references you can actually call.

COPY-AND-KEEP SHORTLIST

☐ Where is our data hosted, and what compliance certifications do you hold?

☐ What does onboarding actually involve, and who owns each step?

☐ Show me true end-to-end automation live, not a description of it.

☐ Which of our existing systems does this integrate with out of the box, and which need custom work?

☐ What accessibility standards does the platform meet?

☐ Can we speak to a customer with a program similar to ours — and can we choose who, rather than only speaking to the references you suggest?



STANDOUT TIP

Go off-list. Ask to speak to a customer the vendor didn't hand-pick. A vendor confident in their product will say yes.

Plan for implementation and adoption

The most common reason volunteer management software rollouts fail isn't a missing feature. It's poor volunteer adoption. Plan for a realistic timeline, manage change deliberately across your team, and test the actual volunteer experience before you commit, not after go-live.

PRACTICAL STEPS

01 TEST

Test the volunteer-facing experience yourself before committing: sign up, get onboarded, get scheduled, as a volunteer would.

02 DEPLOY

Phase the rollout rather than switching everyone over at once.

03 EFFICIENCY

Use ready-made templates and communications rather than building onboarding materials from scratch.

Software is a tool, not a strategy. It needs supporting policies and process behind it, or adoption stalls regardless of how good the platform is.



Frequently asked questions

How do I choose the right volunteer management software?

Run a needs assessment first, involving coordinators, IT and volunteers. Prioritise requirements as must, should or could, then score every shortlisted vendor against the same criteria. Compare total cost of ownership, not just the subscription, and test volunteer adoption before you commit.

What features should volunteer management software have?

Core features include recruitment and onboarding, scheduling, communications, hours tracking and reporting, a volunteer mobile app, automation, and secure data handling. Which of these are must-haves versus nice-to-haves depends on your program's type and size, not a fixed list.

How much does volunteer management software cost?

Pricing varies by model – per-volunteer, tiered or flat-rate – and the subscription is only part of the cost. Total cost of ownership also includes data migration, implementation, training and the cost of scaling. Ask vendors for a quote based on your actual program size rather than relying on published price ranges.

What is the difference between a CRM and a volunteer management system?

A CRM manages supporter and donor relationships; a volunteer management system manages the volunteer lifecycle, including recruitment, scheduling, hours and communications. Many CRMs lack true volunteer functionality, so organisations often run both together.

Why do volunteer management software implementations fail?

The most common reason is poor volunteer adoption, not missing features – if volunteers find the platform hard to use, the rollout stalls regardless of what it can technically do. Mitigate this by testing the volunteer experience early, phasing go-live, and supporting the rollout with clear internal processes.

Choosing volunteer management software comes down to the same decision throughout this guide: fit for your program's actual complexity, capacity and reporting needs, at a total cost you've compared honestly across vendors.

Ready to see how Rosterfy scores against your own criteria?

Use the evaluation scorecard and vendor-question checklist in this guide to run a like-for-like comparison and then book a walkthrough to see how Rosterfy performs against the criteria that matter most to you.

[BOOK A ROSTERFY DEMO](#)