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FOR IT AND TECHNOLOGY LEADS

Volunteer Tech Audit Checklist

An extensive audit that shows every tool holding volunteer data, what's in it, who can reach it, and which tools your teams would happily give up.

Volunteer programs are one of the most common places shadow IT grows. A coordinator needs to recruit, schedule or message volunteers, the approved tools don't quite fit, so they sign up for a free app or build another spreadsheet. Each choice makes sense on its own. Together, they leave personal data in places IT can't see or govern.

This checklist isn't a compliance crackdown. It's a way to understand what your program teams actually need, so you can replace workarounds with something they'll want to use.

How to use it

1. Book 45 to 60 minutes with each volunteer program lead. Work through the checklist together rather than sending it as a form.
2. Fill in Steps 1 to 4 for every tool they mention, however small. A shared spreadsheet or group chat counts.
3. Use Step 5 to frame the conversation, and the final section to agree what you're working toward.

1 List every tool in use

Start with what volunteers and coordinators touch day to day, not what's on the approved software list. Prompt with each job: how do you recruit, screen, schedule, message, train and track hours?

Tool	What it's used for	Who set it up	Approved by IT?	Volunteers it touches
e.g. Shared spreadsheet	*Shift schedule*	*Program coordinator*	*No*	*~400*
e.g. Free sign-up app	*Event registration*	*Events team*	*No*	*~1,200*
				~150

Common places to look: online form builders, shared drives, personal email inboxes, messaging apps, free scheduling tools, paper sign-in sheets that get typed up later, and exports sitting on laptops.

2 Note what data each tool holds

The risk of a tool depends less on what it does than on what it stores. Tick every type of data each tool holds.

Tool	Contact details	Emergency contacts	Background check results	Health or accessibility info	Data about minors	Hours or attendance
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐

Any tool holding background check results, health information or data about minors moves to the top of your list, whatever else it does.

3 Check who can access it, and for how long

Volunteer access is usually granted quickly and rarely removed. These columns show where that's happening.

Tool	Who can access it today	Access removed when someone leaves?	Retention rule in place?	Covered by single sign-on?	Data exported elsewhere?

A "no" or "not sure" in any column is worth a follow-up. "Not sure" is often the more important answer, because it means nobody owns the question.

4 Ask what teams would give up

This is the step that turns the audit into a requirements list. For each tool, ask the people who use it what they'd do if something better replaced it.

Tool	Keep, replace or retire?	What it does well	What frustrates people about it	What they'd need from a replacement

The "what it does well" column matters. A workaround survives because it solves a real problem, and any replacement has to solve it too.

5 Frame the conversation as support

How you open the audit decides how honest the answers are. If program teams think they're being caught out, the spreadsheets stay hidden.

- **Start with their frustrations, not your concerns.** "What takes longer than it should?" gets further than "Which tools haven't been approved?"
- **Make it clear nothing gets switched off tomorrow.** The goal is to understand, then improve.
- **Share what you find.** Send each team a short summary afterward, so the audit feels like something done with them, not to them.

What good looks like

Once the audit is done, use this list to agree what you're working toward with program teams. Tick off what's already in place.

- [ ] Volunteer data lives in one approved system, not spread across several tools
- [ ] Access is set by role, so each coordinator sees only what their role needs
- [ ] Access is removed automatically when a volunteer or coordinator leaves
- [ ] Background checks are enforced before scheduling: no current check, no shift
- [ ] Retention rules are set in the system and applied without anyone remembering to
- [ ] Volunteers update their own details, so routine requests don't become IT tickets
- [ ] Volunteer records flow into your CRM, with one agreed source of truth
- [ ] The system holds up on your busiest day, not just an average one

Most organizations won't tick every box today. The gaps tell you where to start.

Next step

If your audit turns up more tools than you expected, you're not alone. When you're ready to compare options, we're happy to walk through your findings and show how Rosterfy brings volunteer recruitment, screening, scheduling and messaging into one governed platform.

Talk to our team

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Rosterfy is an end-to-end volunteer management platform that automates administration, streamlines operations, and helps organizations recruit, engage and retain volunteers at scale. **Less Admin. More Volunteers. Real Impact.**