So you think you want a volunteer management system?

Wendy Halley

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Welcome to Paradise

So many options

- Volunteer Management System
- Bespoke or off the shelf
- CRM (customer relationship management)
- HR

Technically speaking….

- What's the impact on IT?
  - Implementation - SaaS
  - Ongoing support
- Security
  - Standards
  - Data location
- Data integration

Let's talk

Need is good

- Requirement not solution
- Frame it for stakeholders:
  - What's the problem you're trying to solve?
  - What information do you want to know?
- Future-proof
  - Don't always listen to them!

I want sprinkles!

- As a volunteer, I want...so that...
- As a manager I want...so that....
- As an administrator I want...so that...
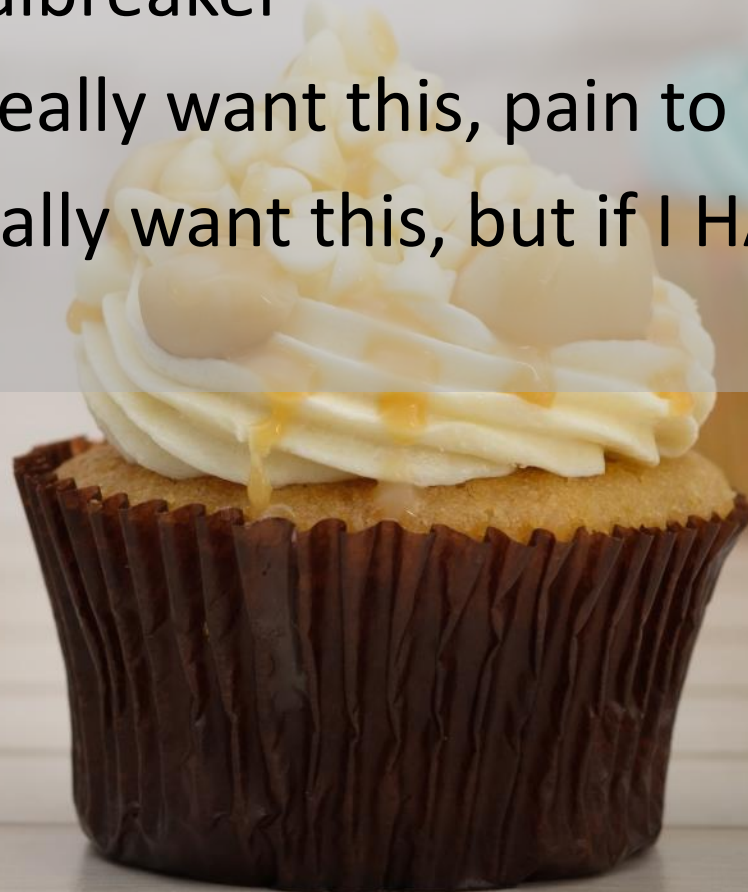- PLUS system requirements

10 minutes

- Discuss your requirements

- Together, write three functional requirements, formatted as user stories

  - As a …..I want…so that…

I want sprinkles!

- Prioritise
  - Must - dealbreaker
  - Should – really want this, pain to work around
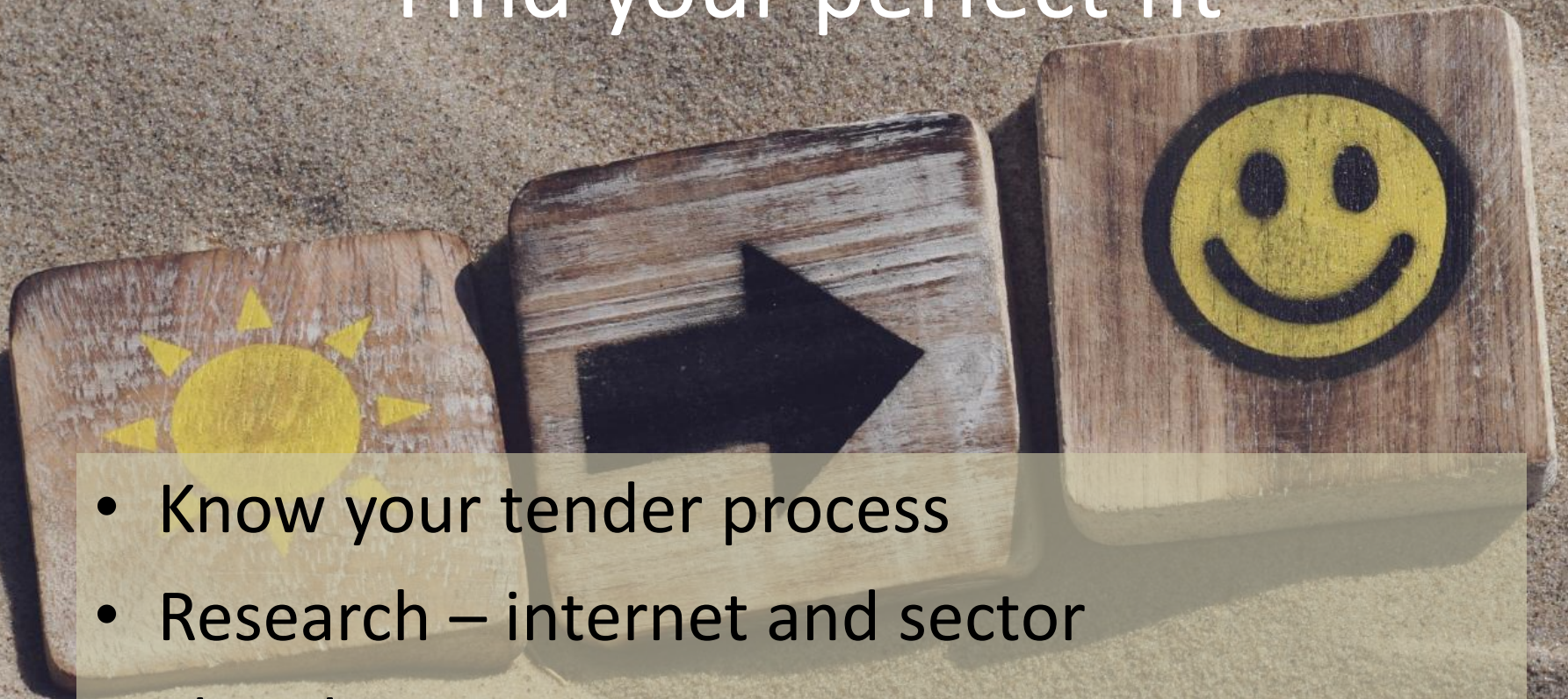 - Could – really want this, but if I HAVE to…

Go with the flow

- Map your key processes
- Now and the ideal
- Plan to change
- Don't just digitise your paper process

The application process

- Register interest?
- Application form – just one?
- Progress to selection meeting?
- Selection meeting outcome?
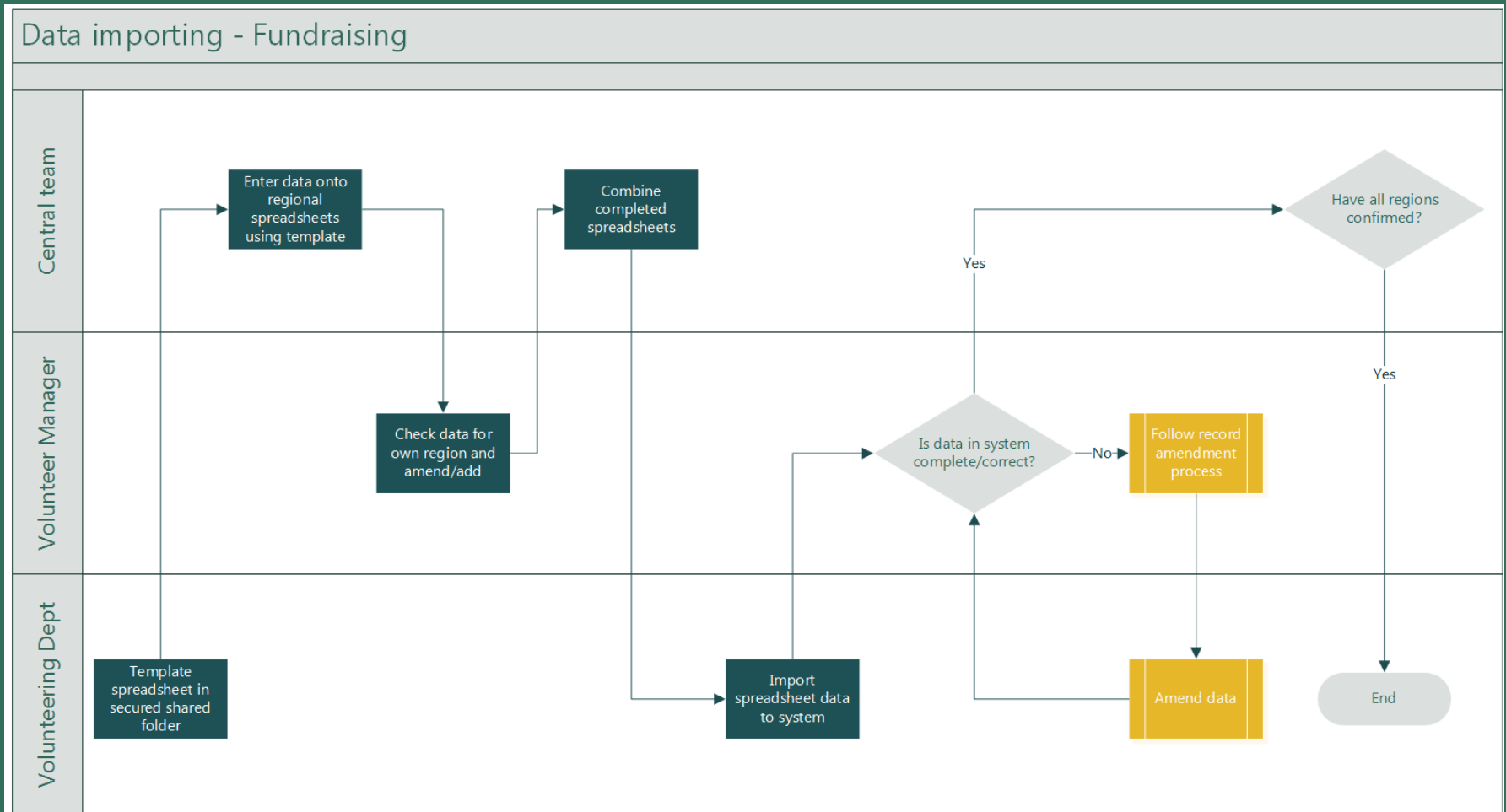- Rejection – reasons and comms?

Find your perfect fit

- Know your tender process
- Research – internet and sector
- Shortlist six
- Background; aims; requirements; processes
- Be nice! Six weeks plus

TO DO

- Communication
- Data
- Training & support
- Stage and scale up

Swimlanes

Data importing - Fundraising

Central team
- Enter data onto regional spreadsheets using template
- Combine completed spreadsheets
- Have all regions confirmed?
- Yes

Volunteer Manager
- Check data for own region and amend/add
- Is data in system complete/correct?
- No
- Follow record amendment process
- Yes

Volunteering Dept
- Template spreadsheet in secured shared folder
- Import spreadsheet data to system
- Amend data
- End

All change!

- Change management
- Worries
- Resistance
- The totally new

5 minutes

Discuss one of these groups of people and how you'd bring them along:

- Worried about another new system
- Not wanting to change how they do things
- No current processes

Hi m8 wt u doin dis fri? let me no 2nite

"Technology is nothing. What's important is that you have a faith in people, that they're basically good and smart, and if you give them tools, they'll do wonderful things with them."

- Steve Jobs