

# Digital in Volunteering TOOLKIT

Shaped by Volunteer Leaders, for Volunteer Leaders

Developed by



TeamKinetic

Designed by

+ GETHYN  
WILLIAMS  
NON-PROFIT DEVELOPMENT



# Welcome to the Digital in Volunteering Toolkit!

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**Technology is changing faster than ever. It can be tough to keep up, especially when you're busy managing volunteers!**

Think of this as your guide to the digital volunteering world. It's got tips, tricks, and diagnostic tools to help you make smart decisions about tech - so you can spend less time troubleshooting and more time supporting your amazing volunteers.

This Toolkit is just the beginning. We want to create a Community of Practice where volunteer managers can connect, share ideas, learn from each other and feel more confident about embracing digital.

Because let's face it, we're stronger together.



**Gethyn Williams, Ruth Buchanan Leonard and Chris Martin**

Developed and supported by the Association of Volunteer Managers (AVM) and TeamKinetic. Designed by Gethyn Williams.

## Part 1: Developing your vision

This first section of the Toolkit is designed to prepare you and your organisation for a digital development journey - to set your direction of travel and build your knowledge, motivation and confidence to get going.

Within Part 1 you'll find five elements to help identify your needs, diagnose your issues, ask the right questions, formulate an approach and embark on your digital journey. And because many like to learn from their peers, we've included case studies or quotes from involving organisations, on how they've tackled these questions and challenges.

In developing the Toolkit we learned that bringing others with you is one of the hardest parts of digital implementation. Being able to communicate clearly around digital is vital, which is why our initial goal is to prepare you for some key milestones - whether you're making a pitch for investment or talking to a software provider or digital specialist.

Parts 2 and 3 of the Toolkit will follow in 2025 - see page 26 for more information.

### How to use the Toolkit

The five elements here are designed to complement each other - we suggest completing them all. You don't need to follow them in order however, start wherever feels right.

#### Get confident around digital

It's time to move beyond the spreadsheet and understand what your programme needs from digital (and what it doesn't).

Use our checklist - key features you'd find in any good Volunteer Management System - to help you understand your 'must haves', what you probably don't need and everything in between. This can be a great starting point for internal discussions, shaping what's in and out of scope.

#### Develop your digital vision

It's easy to get distracted by the latest advances in digital.

By dividing your goals into those that help you grow, be more efficient or improve the volunteer experience, we can focus on the areas where digital can really help. Take our benchmarking exercise to help develop your digital vision - and see how your needs compare with other Leaders in Volunteering.

#### Understand the volunteer journey

The customer is always right, right?

Understanding the user experience (UX) is integral to many digital products. Use our simple template to map out your points of interaction with volunteers, identifying where digital can take you up a level. Use this internally for a great customer journey discussion, or even externally as part of a brief for developers.

#### Pitch for digital investment

Securing investment for digital can be tough.

Built on the ideas of volunteer-involving groups, this section outlines the strongest arguments to make when influencing Senior Managers, Trustees and External Funders. Use it to help identify the strengths and gaps in your business case, preparing for internal and external pitches.

#### Map out your organisational journey

I like what they're doing! How did they get there?

Shepherding your organisation through a digital volunteering journey may not be quick or straightforward. This element summarises advice and guidance from a range of thought-leaders and provides a useful case study from a national charity on their digital journey. Use this section to review your thinking, plan next steps and take confidence from others.

## #1 Get Confident Around Digital

### “What kind of Volunteer Management System (VMS) do we need?”

This may well be the most commonly-asked digital question in volunteering. Chances are it's something you've had to consider already.

As [Charity Digital](#) states, 'Many organisations manage volunteers with Word documents, Excel spreadsheets, perhaps even old-fashioned pen and paper. Organisations are aware that they need to change... but often assume that effective digital volunteer management will be complex, difficult to install and use, or simply too expensive.'

### What is a VMS?

'Volunteer Management System' is a simply generic term for a digital tool that supports effective volunteer management - usually providing one centralised place or platform for streamlining a variety of processes relating to management and engagement.

Some volunteer-involving organisations use a 'Customer Relationship Management' (CRM) system for the same purpose, or may simply refer to their 'digital platform' as a catch-all term for a combination of different systems and programmes used collectively.

### What does a VMS help us to do?

They're all different, but common features and use cases include:

Feature	Value / use case
<b>Marketing and Communication tools</b>	'Segment' different volunteer groups to reach volunteers more regularly and efficiently. May also enable volunteers to communicate with each other, for social or supportive reasons.
<b>Expression of interest / application portal</b>	A 'single front door' through which to capture interest and instigate applications, improving your chances of conversion.
<b>Task allocation and role matching functions</b>	Predictive or volunteer-led 'matching' features can help automate or supplement the tasks of Volunteer Managers, where desirable.
<b>Calendar and scheduling management</b>	Organise and allocate your tasks and shifts quickly and collectively. Supporting volunteers to 'self-serve' provides efficiencies for you - and can be empowering for them
<b>Records of volunteer profiles and contributions</b>	Manage personal details securely, keep track of training records, achievements and the ability to report effectively on your programme's impact.



## Choosing the right VMS for you

**In today's marketplace, there are many different VMS options available, from off-the-shelf systems to custom builds.**

Some focus on internal management needs, whereas others are more volunteer-facing. A vast range of price points exist, covering both the initial purchase and set-up, as well as ongoing support and maintenance charges.

Even if you don't need a new system right now, think of this exercise (designing your ideal VMS) as a Trojan Horse for figuring out how you want digital to serve your needs.

When embarking on projects like this, many use the popular prioritisation framework '[MoSCoW](#)' - an acronym that prompts you to consider your *must* *haves*, *should* *haves*, *could* *haves* and *won't* *haves*.

### US volunteering specialist Karen Knight lists five key considerations in [choosing a CRM](#) including:

- Setting a budget (for upfront as well as ongoing costs)
- Having a high-level understanding of why you need it
- Mapping who will run it (the number of administrators is likely to impact on costs)
- Deciding on the features you really want
- And then researching the market to consolidate your features list and eliminate what you don't need.



read more here 

## Ready to start?

Use our MoSCoW-inspired [spreadsheet-based checklist](#) of features to build your longlist of digital requirements - the key functionality you really need, and what you can rule out. This will give you a great starting point for developing your vision or kicking off conversations with developers.

## Using the MoSCoW template

When you download the template you'll see that we've included a range of features commonly found in many systems - with plenty of extra space to include your own ideas or describe these tools in the language that works best for you.

For each feature you can also use the drop down checklists to identify the key audience that benefits from it, the stage of the volunteer journey the element best supports and even the Vision for Volunteering theme to which this objective most closely relates. These options will help you filter effectively when you come to write up your development plan or create a business case.

**Whilst doing this alone can be helpful in clarifying your thinking, you may also wish to engage internal colleagues** - especially if your volunteers share a 'customer journey' with other teams (i.e. if they are also your organisation's beneficiaries, customers, fundraisers or similar).

## A Volunteer Management Revolution at Willowbrook Hospice

### CASE STUDY

Willowbrook Hospice, known for their exceptional palliative care, used to rely on manual processes to manage their volunteers.



### Pre-VMS Challenges

Willowbrook Hospice struggled with its volunteer program due to manual processes that consumed time, such as managing rotas and logging hours. Ian, the Volunteer Manager, noted that this administrative burden limited the team's ability to focus on providing support to volunteers.

### Why TeamKinetic?

After exploring various options, Ian chose TeamKinetic for its user-friendly interface, automation features, and the ability to delegate control to shop managers. The platform promised a centralised solution to reduce administrative workload and enhance efficiency. Ian particularly valued the platform's simplicity and adaptability, which allowed his team to focus more on volunteer engagement.

### Post-Implementation Wins

The transition to TeamKinetic brought immediate and transformative benefits to Willowbrook Hospice. Ian summarised the experience, saying, *"It's an absolute no-brainer. The time saved alone is worth it, but more importantly, it makes managing volunteers easier and more efficient. I've already recommended it to other hospices."*

## CASE STUDY

### How the Ramblers chose a new VMS

This case study is based on information kindly shared by Volunteering Leads at the Ramblers during an AVM webinar. AVM members can [watch that in full here](#).



#### SETTING THE OBJECTIVES

Several factors prompted this project: Ramblers needed to know more about their volunteers for insurance purposes, and the Fundraising team wanted to know more about what they did, for case study purposes. The Volunteering Team themselves were mainly interested in improving the volunteer experience and using digital to encourage more 'self-service'.



#### MAKING A CASE FOR INVESTMENT

Funded via a major new grant programme, the VMS business case was based on capturing volunteer impact more consistently and at scale - a total of 18,000 volunteers meant there was a lot of potential activity going uncounted or under-recognised.



#### DECIDING ON MOSCOW REQUIREMENTS

High-level requirements were captured from those working closest with volunteers. Asking them 'what would you like to know more about?' proved to be a rewarding approach, leading to a better internal understanding of how the organisation engaged volunteers, as well as providing a bit of a "therapy session" for staff involved with the volunteer customer journey.

### What does the new VMS do?

A popular, commercially available 'off the shelf' VMS was procured, with standard and customisable elements. Ramblers use it to:

- Manage volunteer details and support key elements of the whole journey;
- Encourage volunteers to 'self serve' - e.g. keep personal info up to date;
- Provide online training, resources and support, all in one place;
- Help volunteers to network and support each other, something many wanted, improving the volunteer experience and ways of sharing successes, in turn improving recognition.

## Lessons from implementation

### CASE STUDY



It can be difficult to get your whole organisation to a new system's full functionality. Rather than educate all colleagues on all options from the get go, Ramblers chose to roll out in stages, breaking up the necessary learning of new processes and procedures and avoiding overwhelm.

They also chose their language carefully, rejecting the term 'Volunteer Management System' in favour of the simpler 'volunteer website', based on the insight that some volunteers don't like the idea of having to use 'more systems' or to 'be managed'.

## How's it gone down?

Many have welcomed the change and found the new system easy to use. The app element has been particularly well-received by volunteers, many of whom no longer use desktop computers or web-browsers to access online content.

Some expressed concerns about personal data (what is visible to other users), which has prompted attempts of educate some volunteers on GDPR requirements.

### RAMBLERS' TOP TIPS



**1. Remember the VMS doesn't manage volunteers - managers do!**

That's why the language you choose and use is so important;



**2. Be clear on what you want to achieve and don't oversell the benefits.** Balance enthusiasm with the recognition that it won't solve all problems;



**3. Take it one step at a time** - it's a big project, so plan it in stages.

If you have a lot of historic data to clean and re-input, this can even take a few years. 'System fatigue' (too many changes coming at once) is a useful risk to monitor.



## #1 Get Confident Around Digital

## FURTHER READING

This [post from VMS provider Rosterfy](#) cites a number of other areas of activity that a good VMS can support - including micro-volunteering, upskilling, virtual / online volunteering, data safety and fundraising.

For those considering using a VMS for volunteer training purposes, AVM has a [useful article on e-learning platforms](#).

For engaging volunteers online more generally, this AVM [resource on running good webinars](#) may also help with your planning.

And finally, Helpforce have produced a [handy comparison sheet](#) listing key features and prices for common VMS systems in the UK (though be aware, it is a few years old now).



## #2 Develop Your Digital Vision

**With so many exciting digital options available it's easy to get distracted by the latest trends. The temptation to adopt new technology can also be driven simply by what others are doing, creating a 'fear of missing out'.**

How can we resist these impulses, focusing on the aspects of digital most likely to make a real difference to our ambitions, or tackle our thorniest volunteering challenges?

### Starting Points: **Diagnosing issues and opportunities**

Put your digital ideas to one side for the moment and focus on the main issues and challenges you're currently experiencing on your volunteering programme. Work through the questions below to help you diagnose where and how digital options might help.

*In developing this Toolkit we asked AVM members and TeamKinetic conference delegates to complete the same exercise. On page 13 we share their answers with you - so you can benchmark your own experiences.*

#### **1. Within which stage (or stages) of the volunteer journey are you currently experiencing challenges?**

*Use your own categories if easiest, or simply use generic ones such as Recruitment, Onboarding, Active Management, Retention, Exit etc. Try to describe the nature of the the challenge as fully as possible.*

#### **2. What types of volunteers are you targeting?**

*Consider key demographics or characteristics such as age, gender, ethnicity or abilities. If you have them, you might use your own volunteer personas here. Alternatively, you could differentiate between new volunteers (that you're hoping to recruit) and your existing ones (for whom there's an issue you want to address).*

#### **3. What are the key issues facing your current volunteers?**

*If you have it, use your own volunteer survey data or other feedback to help you answer this question. National research on the experiences of all types of volunteers can also help if you don't have your own insights. (further links are provided below).*

#### 4. And finally, which of the five Vision for Volunteering themes feel most relevant to your current challenges?

The Vision is a ten-year collaborative project designed to create a better future for volunteering in England (though its structure and insights can be applied anywhere).

The five themes are Awareness and Appreciation, Power, Equity and inclusion, Collaboration, Experimentation. [Click here](#) or scan the QR code to read more.



read more here



#### Going deeper: identifying your main objectives

Hopefully, those last questions helped you to set some parameters around your digital objectives - the stages of the volunteer journey you're targeting, the balance you want to strike between focusing on new and existing volunteers and the Vision for Volunteering themes most relevant to your plans.

**Next, consider these three additional factors common to the ambitions of digital projects: Scale, Efficiency and Experience.** Many digital projects are designed with one (or more) of these objectives in mind. But which are most important to you?



- **SCALE** - digital is often used as a way to reach new or bigger audiences. If **growing your programme** is a key objective, chances are you're interested in scale. Reflect on your answer to the *types of volunteers* you were seeking to engage here;



- **EFFICIENCY**- could your programme be more streamlined, **saving you valuable time and energy**? If you suspect you may have some duplication or waste, or want to encourage volunteers to 'self-serve' more, efficiency gains may be your main goal;



- **EXPERIENCE** - are your volunteers satisfied with their experience? What would they like more of, less of, or done better? Reflect on your answer about their *barriers and challenges* here.



You could think about **scale**, **efficiency** and **experience** as three possible areas of your desired impact - ways to capture the big outcomes you're seeking from your digital development journey.

Think about how your particular goals fit under each category? Is one more important than the other two? Capture everything you can through these three lenses here - we'll use the scale, efficiency and experience framework again, later in the Toolkit.



### **Believe in your vision!**

**By now, you should be able to summarise some fundamental areas of your digital volunteering vision** - which audiences you're prioritising, the key systems challenges you're facing and whether your core needs skew towards scale and growth, a more efficient programme or enhancing the volunteer's 'customer' experience.

*In element 5 of the Toolkit (Map your digital vision) you'll begin to put all of this together into a project plan.*





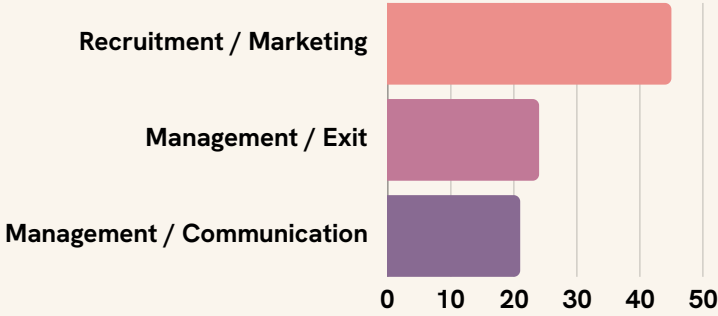
# BENCHMARKING

## Where are other Volunteer Managers focusing their efforts?

Most Volunteer Managers we surveyed were focused on finding new volunteers: **45% said the recruitment / marketing stage was their biggest area of concern.**

Only **24% said the latter stages of management/exit were their focus**, with monitoring, reporting, evaluation and impact capture the biggest challenge.

A further **21% were somewhere in the middle**, dealing with management issues and improving communications with current volunteers.



Remember that you don't have to go 'all in' with digital - it's perfectly possible to bring digital into some stages of your volunteer journey without automating the whole process, or putting everything online. Human contact still has a big role to play!

Focusing on one or two stages may help to unlock the most value. For example, using digital to streamline the application process may bring benefits to you (in terms of **efficiency**) and volunteers (improved **experiences**) simultaneously.

### So, do you have a type?

In a challenging recruitment climate, many Volunteer Leaders are adopting mainstream marketing approaches and 'segmenting' their audiences, tailoring messaging and processes towards different preferences.



This can increase your chances of attraction (reaching warm audiences) and conversion (turning expressions of interest into active volunteering).



In our survey, 42% of our respondents said they wanted to attract more younger volunteers, with smaller numbers (12-18%) targeting working professionals, mature adults and parents/carers.



## Data Insights: TeamKinetic Volunteer Users

Age Range	0-16	17-25	26-44	45-64	65+
Volunteers (%)	1%	24%	41%	23%	11%

User data shows that a VMS system can help with the recruitment of volunteers of all ages, not just younger ones!

### CASE STUDY



#### Attracting younger volunteers

In recent years the British Heart Foundation have managed to lower the age profile amongst their charity retail volunteers by making their programme more inclusive and by offering more flexible opportunities. [Check out their current strategy](#) to learn more.

#### Key issues facing volunteers

**We know that volunteering doesn't exist in a vacuum** - what's happening around us often influences our likelihood of volunteering. For example, new volunteers often come forward when the social need is clear and compelling (like during Covid-19).

Equally, some volunteers may need to disengage at times when time or other pressures are greater such as we're experiencing now, during the cost of living crisis.

It's therefore no surprise that in our survey, most volunteer managers felt their volunteers' biggest challenges were a **lack of time (26%)** and **financial concerns (22%)**. A **lack of flexibility**, or a mismatch of needs and expectations, also registered between **11 and 15%** of our poll.



In order to understand the volunteer experience better, check out NCVO's latest [Time Well Spent](#) report.

It's full of great insights into different types of volunteers. For example, did you know that younger volunteers find slower recruitment and onboarding processes off putting? Or that [Global Majority](#) volunteers are less likely to feel included or a sense of belonging?

NCVO



read more here



### Vision for Volunteering themes

The five themes of England's Ten Year Vision for Volunteering are designed to help volunteer managers embrace changing trends, making programmes more relevant and resilient in the long term. Thinking about how these resonate with your own challenges can provide a handy framework for considering where digital can help.

Our own survey didn't reveal a clear preference of themes - **power, equity and inclusion, experimentation and awareness and appreciation** were all **equally popular** choices. Perhaps strangely (given that it's an area in which digital can be very helpful) only 7% prioritised **collaboration**.





## #3 Understand the Volunteer Journey

Understanding your volunteers' 'user journey' (all their points of interaction with you and your organisation) as well as the 'user experience' (often referred to in digital realms as their 'UX') can be transformative for improving your volunteer engagement.

'Journey mapping' or similar exercises designed to reveal UX are common approaches for enhancing many digital projects - helping you to identify stubborn challenges, sticking points or simply areas for improvement.

Journey mapping is another great way to bring the **Vision for Volunteering** outcomes to life for your organisation - an effective tool for putting the volunteer at the heart of your planning.

These insights might help you to improve the volunteer **experience**, or create **efficiencies** for you as the host organisation, or both.

### Mapping the volunteer journey

In this element we're using a [simple spreadsheet template](#) to help you map out your own volunteer journey. Click on the link to [download your copy](#).



You could approach this by thinking about your whole volunteer programme, mapping *only* the common stages through which *all* your volunteers might pass.

Or you could use it quite specifically, for just one of your volunteer roles, including some steps covered by only those volunteers. The exercise can be repeated for as many roles, or types of volunteer, as you'd like to explore.

Remember - the stages you map don't all need to be 'digital' ones, or online; the exercise will highlight where you're currently using digital in your journey and where you're not, allowing you to assess whether you want to go further with digital.

The ultimate goal is to help you understand your volunteers' experience better - increasing your chances of converting your pipeline of early interest (recruitment) and/or deepening engagement with active volunteers (retention).





## FURTHER READING

### Is there a 'digital divide' within your cohort of volunteers?

By this we mean, are some of your volunteers more comfortable with using digital tools than others?

It needn't always fall to you to support them. [In this article](#), volunteering expert Rob Jackson explores how you might engage your more digitally-savvy volunteers to help support and encourage those less willing or able to get involved.

This may help if you're trying to get more volunteers to 'self-serve' online, supporting your efficiency objectives. The Ramblers case study (see page 7) covers this objective, to some degree.

This kind of peer support could be encouraged in a casual and informal way, outside of your direction as a Volunteer Manager, but if you'd like something a little more structured [here's an example](#) of how these kinds of 'Digital Champion' roles can work.

For a broader introduction, Charity Digital have [a range of great resources on how to create compelling digital user journeys](#), whose lessons you might apply within volunteering or on your own programme.

And finally, check out this blog post from TeamKinetic on [How to bring your non-digital volunteers, digital!](#) It includes tips on where to start when introducing digital technologies to reluctant-to-engage volunteers.



## #4 Pitch for Digital Investment

Securing investment for digital developments can be tough. Whether you're completing a funding application or trying to convince internal colleagues to support your ideas, communicating the value of what you hope to bring to your programme is rarely straightforward.

Regardless of who you're trying to convince you will probably need to create a business case - an evidenced justification for your digital project, based around the benefits you expect it to bring. This element is designed to will help you to do just that.

### What's in this element?

Built on real world experiences, below you'll find great insights from Volunteer Managers on pitching to three very different audiences - **Senior Managers**, **Trustees** and **external funders**. Even if you only have one in mind you may like to consider the others - interrogating your ideas from a number of different angles will help you understand its strengths, as well as predicting the more challenging questions you might be asked.

### PITCHING TO SENIOR MANAGERS

Senior Managers are usually well-versed in managing competing priorities.

As clear as your need may be, it could be just one of many requests coming at them. In order to gain their support you may need to frame it in terms of its benefits for the whole organisation - not just how it solves your own day-to-day issues.



Continued on next page...

## PITCHING TO SENIOR MANAGERS continued...



- **Check on how your ideas align with your organisation's strategy.** If your most important outcomes have 'key performance indicators' (or similar) can you describe your project in terms of it supports them?
- **Consult with your colleagues.** How might your digital enhancements benefit their work? Anyone involved in marketing, communications, impact or HR will likely have an interest in what your volunteers do. Put these benefits into your business case
- **Linking your ideas to other digital upgrades.** If your organisation is upgrading its digital infrastructure in other areas, find out what is planned and explore whether your needs could be integrated. This could generate service efficiencies, cost savings or other added value
- **Linking the business case to your personal work objectives.** If you have goals for your role (perhaps linked to your appraisal), consider whether the project supports your ability to deliver on them. This may help with line manager support.

### Need help building a business case?

We know that there are a wide range of considerations when you are looking to invest in new technology.

[Take a look at this blog from TeamKinetic](#) with examples on how you can go about building a business case to pitch to the higher-ups within your organisation. It considers key issues such as compliance, security, costs, time, volunteering trends, and more.



## CASE STUDY

**SCIENCE  
MUSEUM  
GROUP**

When the National Science Museum invested in the creation of a new Volunteer Manager System, a key determining factor in its approval was the need for consistent, reliable data.

Different museum sites were taking different approaches to capturing volunteer data, leaving gaps in reporting and making it difficult to develop the programme further at a national level.

Though trying to enforce more standardisation was an option they considered, the decision to build a whole new system was taken because they wanted to avoid accidental data loss - when lots of Managers all use 'open' systems (like Excel or Google Sheets) there's always a risk of accidental deletion - a 'single possible point of failure'. Something more secure was required.

### PITCHING TO TRUSTEES

Trustees have a statutory duty to manage their organisations' resources responsibly. As the final decision makers, they often have to weigh up the merits of competing demands for scarce resources, before deciding on a course of action.



This means they may have a different 'appetite for risk' to your senior managers, so considering your proposal through this lens - one of risk management where individuals may be naturally cautious - may be a helpful way to get their attention.

When considering risk, Trustees often think about legal compliance and avoiding liabilities incurred through negligence. In volunteering, such risks most frequently crop up in relation to **safeguarding, health and safety** and **data protection**. So consider how your proposal might help reduce or mitigate these risks, e.g.

- Helping you keep more accurate records of volunteer activity these areas?
- Providing automatic flags when quality assurance processes need to be renewed?
- Or simply allowing you to dynamically monitor and manage risks better?

Unless your systems aren't sufficient to cover these needs you may not feel confident to report on the risks you are already facing. Alerting Trustees to these unknowns may not automatically lead to fresh investment - but it may at least help you secure enough support to explore and develop your proposal further.



## PITCHING TO FUNDERS

The criteria different funders apply to digitally-focused applications may vary considerably, so there's little generic advice we can include here.

We suggest you explore a range of different funders, perhaps narrowing them down by their eligibility criteria (whether you are in a position to apply at all, and what levels of funding they offer).



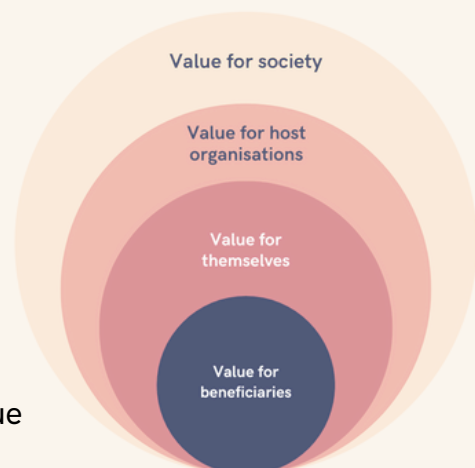
Catalyst maintain a great list of funders open to digital applications, allowing you to assess your options - both for grant programmes specifically for digital projects and open programmes that welcome applications of a digital nature. By way of general preparation, you might also consider:

- **Speaking with a range of digital suppliers and providers**, to get an indication of cost when purchasing a system or service; understanding product features may also help you to describe to funders what you're able to measure, and therefore how you're likely to be able to demonstrate impact or success;
- **Implementing IT projects is notoriously tricky** - funders may feel they are too 'high risk'. So think about what you can say to convince a funder you can manage this risk well. Does your organisation have a good track record of implementing other digital projects? Have you already thought about or secured expert help? Track record and wider support are useful elements to consider.

## Describing the value of volunteering in your proposal

In your business case you may also need to describe the value that your programme generates. This is rarely straightforward, as volunteering typically generates value in a range of different areas simultaneously, making it difficult to build a composite picture.

Different metrics used to describe different kinds of value, some of which appeal to some audiences more than others. For example, putting a £ value on your programme may be useful in some circumstances, but could be off-putting for those who feel £ measurement devalues volunteering, or misses the point. There are few standardised approaches to measuring volunteering value. Most who attempt it build their own bespoke approaches. On the next page is a quick summary of different methods used, depending on the kinds of value you're looking to capture.





# HOW DO WE CAPTURE DIFFERENT KINDS OF VALUE IN VOLUNTEERING?



<p><b>For beneficiaries</b></p>	<p>These methods are often more qualitative (descriptive) than quantitative (numbers), focusing on the difference the intervention has made to beneficiaries personally. Some health and wellbeing benefits are quantifiable in £ terms, though this value is more likely to be expressed for society (as savings for the taxpayer) than for the beneficiary themselves (see below).</p>
<p><b>For volunteers themselves</b></p>	<p>Though some have calculated <a href="#">generic monetary values</a> of value for volunteers themselves, most try to measure wellbeing gains through subjective 'distance travelled' surveys, benchmarked when people start volunteering. Getting such qualitative data from volunteers can be a challenge, but <a href="#">this article</a> from Tempo describes a number of different metrics they use to assess benefits in their own impact capture. These may be helpful starting points if you are considering putting together your own volunteer value surveys.</p>
<p><b>For hosts</b></p>	<p>The <a href="#">replacement cost</a> method is possibly the oldest way of measuring value in volunteering, simply taking volunteer hours and multiplying them by a standardised £ value. But though a useful starting point, critics point out that it reduces the value of volunteering to 'merely' its labour.</p> <p>The <a href="#">VIVA</a> tool (Volunteer Involving Value Audit) goes a bit further, including management and other organisational costs - this at least does help dispel the notion that volunteering is 'free labour'. <a href="#">This article from deedmob</a> provides wider perspectives on the value of taking a monetary approach.</p> <p>If your service is completely or mainly volunteer-led, identifying a ratio of volunteers to beneficiaries could help. <a href="#">Join In</a> calculated the value of volunteers in local sports clubs by identifying the ratio of volunteers to members (1:8.5) allowing them to argue that each volunteer supported 8.5 individuals to be active.</p>
<p><b>For society</b></p>	<p>These 'big number' projects tend to put all of the above approached together, usually with expert help from economists or data experts. See Join In's Hidden Diamonds example above for a great example, which uses standardised unit costs of public services to estimate return on investment savings in areas such as wellbeing and physical health. To build your own bespoke approach, refer to guidance from <a href="#">Social Value UK</a>.</p>

## #5 Map Your Digital Journey

Leading your organisation through a digital volunteering initiative may take time and planning. Luckily, there's plenty of guidance (and prior experience) out there to support your efforts.

At this point you may well have completed some exploratory work to understand your core needs (Toolkit elements #1 & #2), diagnosed your main issues and areas of potential for digital (#3) or considered how to put a business case together (#4).

### Putting together a project plan

Once you have the green light to develop your project further, use this section's summaries of relevant advice and guidance to help shape your plan.

### A long-term project, planned in stages

Many who have been down this road highlight the importance of taking your time and planning in stages, leaving plenty of time for training, getting familiar with one new digital element before introducing another, bringing others with you.

Working in stages is also a great way to reduce risk; being clear about the objectives of each stage can help ensure that you fully complete one development before starting on another, reaffirming the support and buy-in you need, en route. This [short post from NCVO](#) echoes much from the Ramblers' case study in element #1, recommending you:

- take time to become clear on your priorities;
- understand your audience;
- be able to prioritise and compromise;
- be realistic about what a system alone can achieve and how much time it might take to implement; and
- that you also develop the policies, procedures and behaviours you might need in to truly get the most from your investment.

### 'Off the shelf' - or a bespoke build?

You may now feel ready for a conversation with an external software provider or developer. This might help you build out your different project stages, including design, build and implementation, as you put your plan together.

Most platforms will have options to customise to your own needs - this is something TeamKinetic offer. You can get in touch to discuss your options [via email](#). And if you're thinking about something completely bespoke check out our full Science Museum group case study on the next page.

## CASE STUDY A VMS Bespoke Build

# SCIENCE MUSEUM GROUP

When looking for a new VMS the SMG decided to build their own - and do it all in house.

### Situation

In 2015 the SMG realised that their data, covering +1,000 volunteers, was in some areas inconsistent and split across multiple different sites. A new Head of Volunteering was brought in with a remit to resolve this risk, bringing the whole volunteering programme together under a new, single 'back end' system, primarily addressing internal needs.

### Task

They started by creating a **business requirements document**, incorporating everything the Group knew about volunteering. The Head of Volunteer led this in collaboration with a colleague from IT, which proved valuable for shaping the system that would eventually be commissioned. They used the MoSCoW framework (see element #1) to start this process. The rest of the business requirements document covered the following:



#### ESTABLISHING COSTS

Development of the software itself and the time commitment of various staff - for example, an early stage involved cleansing a lot of existing data.



#### THE CASE FOR MOVING TO A NEW SYSTEM

Evaluating various options, from building their own in-house to buying something off the shelf.



#### DESIGNING THE SPECIFICATION

Their MoSCoW list was informed by internal workshops (a users and auditors group was established) and workflows were mapped against the user journey.



#### MAPPING PROJECT STAGES

The business requirements revealed a series of key decision points (senior manager sign off, internal staff engagement) which in turn influenced the project's various stages together.



#### GUIDING PRINCIPLES

Early discussions revealed several non-negotiables, which were used to provide project governance and guard against mission drift.



#### BALANCING CENTRAL AND LOCAL NEEDS

Mostly designed as a 'back end' system, integrating with other platforms, Local Managers retained some discretion over which of these additional systems they might use locally.



#### IMPACT REPORTING

A more challenging area that led to the establishment of a new impact framework, blending hard engagement data (hours, numbers, types of volunteers) with satisfaction metrics (benchmarked against NCVO's Time Well Spent) and qualitative evidence.



## Action

The Group decided on implementing a 'bridging' system - an in-house solution that built on (and standardised) some of their existing digital approaches.



They designed this with their in-house IT team on an SQL database platform. The final specification couldn't quite meet all the MoSCoW needs they identified in their Business Requirements Document, but it did give them a minimum viable product with which to move forward.

## Challenges experienced during the build included:

### STAKEHOLDER MANAGEMENT



The need to build greater understanding at Senior Management level included discussions between the Finance and IT Departments, whose natural inclinations on how to resources a project like this were initially quite different.

### MANAGING USER REQUIREMENTS

Consultation revealed a lot of quite bespoke reporting requirements, which translated into a lot of up front costs for developers.



### TIME COMMITMENT

Total build time took about a year. This included creation of:

- A landing page, designed to filter lots of different fields;
- A unique ID for each volunteer;
- 'Volunteer flow' - the ability for the system to adapt throughout when a volunteer changes the status of one element, maintaining consistency and triggering the appropriate work flows;
- A standardised hierarchy of roles - role outlines with common frameworks.



## Result

The resulting new system replaced a range of ad hoc and manual practices used across different sites, including those recording volunteering hours (paper forms, spreadsheets, signing in and out sheets) and volunteer expenses systems (which volunteers now share with staff and others, across the Group).

In addition, a number of external, independent but integrated systems are also used, such as iTrent (for the application process) and SuperSaaS (for rostering).

## Digital in Volunteering Toolkit: **Wrapping up Part 1**

Congratulations! If you've worked through all five elements, we hope you've gained a strong understanding of what you want from digital in your programme, and how to adopt and implement your new ideas.

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### Look out for Parts 2 and 3 of the Toolkit, coming in 2025!

#### #2 Developing your practice

Bitesize, step-by-step guides to some of the most common use cases for digital in volunteering:

- Marketing and communication tools
- Digital for inclusion and accessibility
- Connectivity and interoperability
- Brokerage and Task allocation
- Incentives, recognition and reward
- Monitoring, quality and compliance
- Digital approaches for infrastructure and membership bodies

#### #3 Considering the future

Interviews, podcasts and thought pieces reimagining the future of digital in volunteering:

- AI and its applications in volunteering
- What an open data revolution could mean for volunteering
- Passports and Passporting - niche fad or part of the new digital mainstream?
- The limits of digital - what it can't (and perhaps shouldn't) replace
- Developing a growth mindset - what can volunteering learn from tech industries?

### Got a suggestion? Get in touch

If you've got real world experience of digital in volunteering issues that you'd like to share with others, let us know. We're always looking for hints and tips, case studies, quotes and volunteer leaders with a great story to tell. Get in touch and help us enhance this resource for others like you.

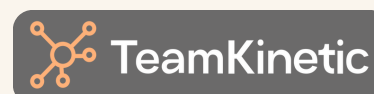
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### Learning, influence, access: **Join the Community of Practice**

The Digital in Volunteering CoP is for Volunteer Leaders and Managers to learn from and share best practice with each other, to mobilise our collective voice to help shape national agendas in digital and to get priority access to new sections of the Toolkit and related training products.

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### TeamKinetic: **Here to help**



Get in touch if you'd like more info on anything discussed in part one of the toolkit. You can reach us via [our website](#), [socials](#), or email ([chris@teamkinetic.co.uk](mailto:chris@teamkinetic.co.uk)).

## Getting in touch



<https://volunteermanagers.org.uk>



<https://teamkinetic.co.uk>



<https://www.gethynwilliams.net>