

# Great Volunteer Management System

## Getting Started with Volunteer Tracking

## Agenda

- The Value of Volunteer Service
- Why to Track
- What to Track
- Why to Track
- How to Track
- Reporting
- Advanced uses

# Icebreaker

In pairs, discuss the following:

- What information about your volunteers might be valuable to have, but that you aren't tracking now?
- Is there information that you are tracking that you don't currently use?

## The Value of Volunteer Service

Impact is:

- Important to volunteers.
- Pivotal to funders. These groups want to know where their money is going, how much of a difference it is making and that their donation is a smart use of resources.
- Valuable to the community.

## Deciding What To Track

- Only track data you are going to use
- Understand the purpose behind each data point
- Data tracked usually poses more questions
- Consider your mission and goals
- Think about different audiences for the data:
  - Volunteers
  - Funders
  - Board
  - General Public



Think about how you currently use data at your organization. What additional data points would you like to track?

# Why track?

## Using Your Data

### Knowledge is power!

- Improve your volunteers' experience
- Improve your volunteer management systems
- Understand your volunteers' impact
- Communicate impact to external stakeholders
- Garner support and resources based on facts

## Using Your Data

### Internal uses of data include:

- Recruitment efforts
- Recognition tactics
- Retention Goals
- Program Evaluation



## Using Your Data

Dear Volunteer,  
Help us raise money!  
We are looking for  
someone with events  
planning experience to  
help with our annual  
fundraiser that takes  
place on Wednesday,  
June 1. Can you help?  
Contact Val Cord at  
[volunteer@nonprofit.org](mailto:volunteer@nonprofit.org)  
to sign up.

Hi Tom,

Thanks for becoming a volunteer.  
We found the perfect role for you.  
You mentioned you were available  
on Wednesdays and have  
planned events in the past.  
Perfect! We need someone to  
help on our June 1 fundraiser.  
Can you be part of the volunteer  
fundraising team that makes our  
work possible another year? I'll  
give you a call tomorrow to  
answer any questions you may  
have.

Thanks,

Val

## Using Your Data

Data can be used externally for:

- Grant applications
- Promoting your program online
- Telling the story of who your volunteers are
- Demonstrating impact and value to your Board and other key stakeholders

## Using Your Data

Data can also help to segment your volunteer base. This can be used internally to make programmatic decisions or long term plans, or externally to seek funding from specific groups or foundations.

You can learn more about volunteers by looking at:

- Commitment
- Responsibility level
- Duration of service
- Types of service

# What to track?

# Contact Data

- Personal
- Emergency
- Demographic

# Personal Data

- First Name
- Last Name
- Email
- Phone
- Preferred Contact Method
- Address

# Emergency Data

- Emergency Contact First Name
- Emergency Contact Last Name
- Phone

“While unlikely, accidents and health issues do happen and we ask volunteers to provide emergency contact information.

The person you list will only be contacted in the event of a health or safety emergency in which you are personally involved.”

# Demographic Disclaimer

“Our organization does not discriminate on the basis of race, gender identity or expression. In order to track the effectiveness of our recruiting efforts and ensure we consider the needs of all our volunteers and constituents, please consider the following optional questions:”



# Demographic Data

- Date of Birth
- Race/Ethnicity (Optional)
  - American Indian/Alaska Native, Asian, Black/African American, Hispanic/Latino, Middle Eastern or North African, Native Hawaiian/Pacific Islander, White, Other, Prefer not to answer; Prefer to self-describe

# Demographic Data

- Gender (Optional)
  - Female, Male, Non-binary/third gender, Prefer not to answer, Prefer to self-describe
- Do you identify as transgender (optional)
  - Yes, No, Prefer not to say
  - Transgender is an umbrella term that refers to people whose gender identity, expression, or behavior is different from those typically associated with their assigned sex at birth. Other identities considered to fall under this umbrella can include non-binary, gender fluid, and genderqueer – as well as many more.

# How to track?

# Collection Methods

- Volunteer entered
  - Google Form
- Staff entered
  - Google Sheets

# Activity: Building a Google Form

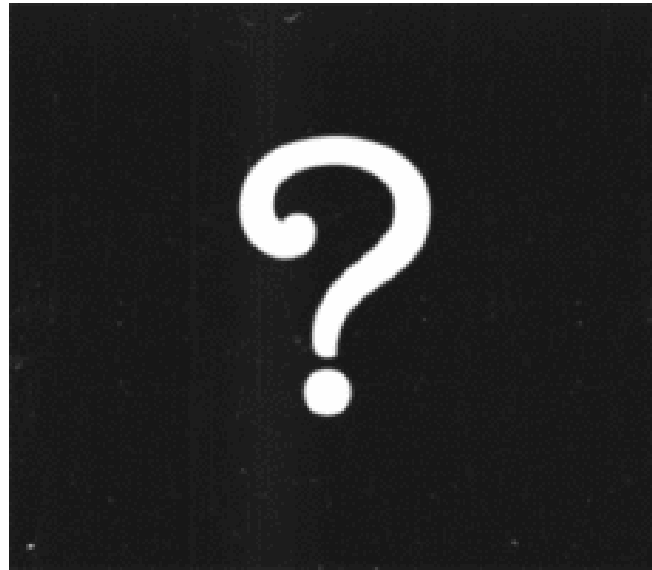
# Activity: Creating a Google Sheet

# Activity: Working with Pivot Tables

# Advanced Uses

- GVMS Topic 16 Assessing Volunteer Costs and Benefits
  - Program inputs
    - \$XX is the total cost of my volunteer program
  - Program outputs
    - \$XX is the total value my volunteer program produces.
    - ...for every \$ invested in the volunteer program, you can expect to see \$ in value.





# Questions

**THANK YOU!**