



CityServeX Introduction

Managing Volunteer Data

Section 04

POINT



04: Volunteer Management System

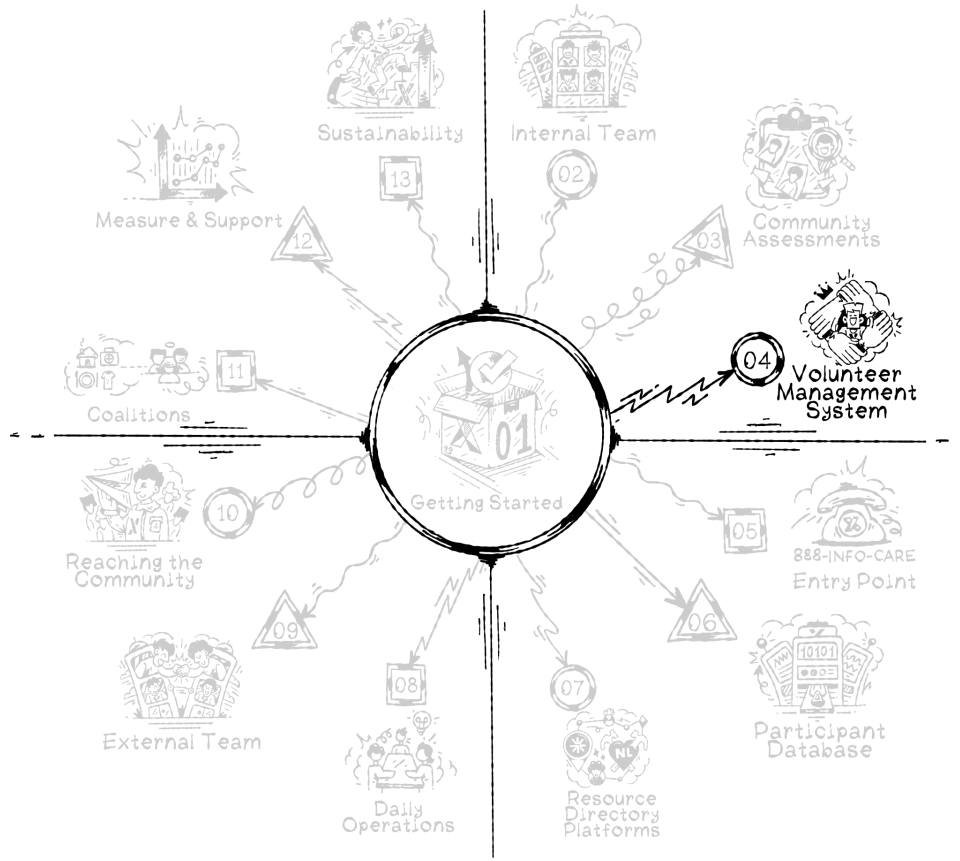




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4.0 Managing Volunteer Data

4.1 What a Volunteer Management System (VMS) does?

The **CityServeX** model engages volunteers in our mission and is a needed component in serving one's community. A Volunteer Management System (VMS) is a software platform or set of tools designed to help organizations effectively coordinate, track, and engage with their volunteers.

Here are the key aspects:

- Volunteer Registration and Profiles - Captures volunteer information, skills, availability, and interests through digital forms and maintains detailed profiles
- Scheduling and Time Tracking - Manages volunteer shifts, allows volunteers to sign up for opportunities, tracks hours worked, and maintains attendance records
- Communication Tools - Facilitates messaging between coordinators and volunteers, sends automated reminders, and enables group announcements
- Opportunity Management - Lists and organizes volunteer positions, shifts, and special events while tracking capacity and needs
- Reporting and Analytics - Generates reports on volunteer activity, impact metrics, and program performance to help with grant writing and program evaluation

4.2 Benefits for Organizations:

- Reduces administrative burden through automation
- Improves volunteer engagement and retention
- Provides data for impact reporting and program improvement
- Ensures consistent communication
- Helps match volunteers with appropriate opportunities

4.3 Benefits for Volunteers:

- Easy access to opportunities and shift signups
- Clear communication channels



- Ability to track their impact and hours
- Simplified registration and onboarding process
- Better matching with opportunities that fit their skills and interests

Many platforms exist to manage volunteer data, and our **CityServeX Sites** may already have a Volunteer Management System. Therefore, a specific VMS is neither required nor preferred. The only requirement is that each **Site** of any size, structure, or location has a VMS that they will use to manage volunteer data.





4.4 Choosing a Volunteer Management System

If you are not currently using a VMS, it is necessary that you choose a platform to use BEFORE you begin recruiting volunteers. If timing prevents this from happening, then start with a spreadsheet of some type to track the following information at a minimum:

- the name of the volunteer
- service role
- dates of volunteer service
- number of hours served on each date
- running total of service hours for each volunteer
- the collective total for all volunteer hours

When you are ready to choose your Volunteer Management System, here are the key factors to consider in your evaluation:

- **Volunteer registration and profiles** - The system should allow volunteers to create detailed profiles with their skills, availability, interests, and required documentation like background checks or certifications.
- **Scheduling and coordination** - Look for features that help manage shift schedules, allow volunteers to sign up for opportunities, track hours, and send automated reminders.
- **Communication capabilities** - The system should facilitate both mass communications and individual messaging between coordinators and volunteers, ideally with options for email, SMS, and in-app notifications.
- **Ease of use** - Both administrators and volunteers should find the interface intuitive. Consider the technical comfort level of your volunteer base.
- **Mobile accessibility** - Many volunteers prefer managing their schedules via smartphone, so mobile optimization or a dedicated app can be valuable.
- **Integration capabilities** - Consider whether the system needs to work with your existing tools, such as CMS systems, email platforms, or donation management software.
- **Reporting and analytics** - Look for robust reporting features to track volunteer engagement, impact metrics, and generate reports for stakeholders.





- **Document management** - The ability to store and track important documents like waivers, training certificates, and background checks.
- **Role-based access control** - Options to set different permission levels for administrators, coordinators, and volunteers.
- **Budget** - Consider both initial setup costs and ongoing subscription fees. Some systems charge based on the number of volunteers or features.
- **Support and training** - Evaluate the vendor's support options, training resources, and response times for technical issues.
- **Scalability** - Choose a system that can grow with your organization's needs and volunteer base.





4.5 Introducing POINT, the CityServeX Preferred Partner

At CityServeX, mobilizing volunteers and powering local impact starts with the right tools—and POINT is our preferred partner for making volunteer management effortless across our sites. POINT is an all-in-one volunteer platform trusted by more than 6,000 nonprofits (including the YMCA, Salvation Army, United Way, and Meals on Wheels) and recognized as a leader in customer support. With POINT, CityServeX site leaders can recruit volunteers through website widgets and shareable volunteer hubs, streamline onboarding with custom applications and waivers, manage volunteer data without spreadsheets, schedule and self-register volunteers in seconds, automatically track hours through kiosks and QR check-ins, and engage their community through email, SMS, and push notifications—all from a single admin dashboard, with mobile and web apps for volunteers. This manual will walk you through how to put each of these capabilities to work at your CityServeX site, so you can spend less time on paperwork and more time mobilizing people power for the communities you serve.

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