

Volunteering Matters invites suitably qualified and experienced providers to submit a competitive quotation for the provision of a digital platform. This platform will support our work with volunteers and beneficiaries across England, Scotland, and Wales.

Charity Background

Volunteering Matters has a sixty-year history of engaging and coordinating volunteers. We have invested in, and used, many systems to help us do this, however in recent years, have relied on a variety of local, project-based solutions. We consulted staff, volunteers, and stakeholders to identify and consolidate our platform requirements to bring all this information together in a holistic way. We have consulted with industry experts to assess whether a VMS, CRM or hybrid solution best meets our needs. The answer is that it could potentially be either one or a VMS within a CRM. We would need the VMS/CRM to have the capability to integrate via an API with software that either cannot be replicated to the necessary standard or software we are required to use for externally funded projects. We believe the API standards are REST with the API returning response in the JSON format. Depending on the platform, we may require Single Sign On (SSO).

The Potential Provider

Organisations must have a record of accomplishment of delivery in the charitable sector and an appropriate financial and legal status to satisfy public sector tendering requirements. The information you provide will assist Volunteering Matters in establishing that you have the necessary commercial and technical capability to submit a quotation and carry out the work, if selected. If requested by Volunteering Matters, potential providers will be required to provide additional documents that further establish their eligibility to make the proposal and proof of their qualifications to fulfil the contract, if accepted.

The Tender

This tender is being conducted as a competitive quotation process in line with Volunteering Matters' procurement policy. It does not fall under the scope of the Public Contracts Regulations 2015.

Key Dates Timetable:

Milestone	Date
Tender issued	15/12/2025
Deadline for questions/clarifications	16/01/2026
FAQ published	21/01/2026
Deadline for tenders	31/01/2026
Shortlisting notification	13/02/2026
Presentations	Week commencing 02/03/2026
Notify potential providers of decision to award contract	03/04/2026

We have structured this document in two parts, the first outlines our overview for a platform to support our diverse and evolving volunteer ecosystem. The second part focuses on our immediate priorities, the essential features, and capabilities that we need now to improve efficiency, data management, and volunteer engagement.

Overview

Statement of Purpose

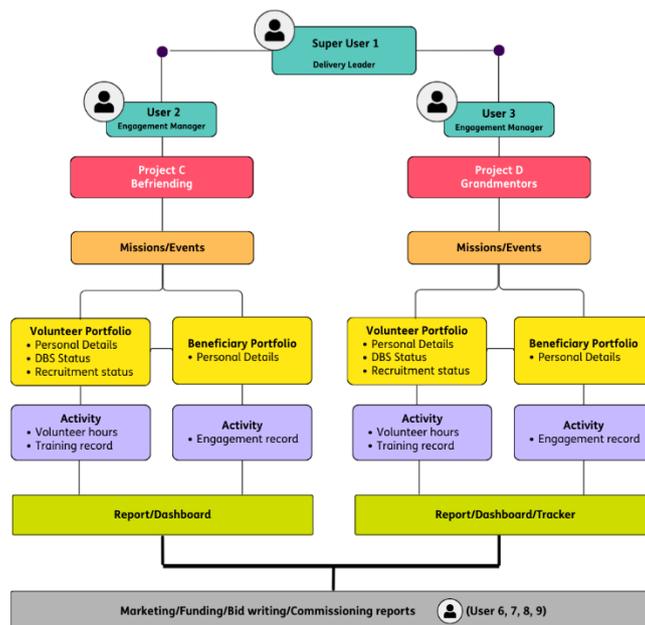
As a charity reliant on volunteers to support beneficiaries, we face ongoing challenges caused by information being dispersed across multiple systems and spreadsheets. This fragmentation leads to data

silos, duplicated effort, and inconsistent records, limiting our ability to see volunteer activity and beneficiary needs clearly. Manual processes further hinder our capacity to track interactions, schedule volunteers effectively, and generate accurate reports. To address these issues, we aim to implement a centralised CRM platform that unifies volunteer and beneficiary data, removes silos, and streamlines workflows. This solution will provide efficient scheduling, accurate reporting, and real-time visibility, enabling us to deliver timely, coordinated, and accountable support. By creating a single source of truth, we will strengthen compliance, enhance collaboration, and empower our charity to maximise its impact for every beneficiary.

Platform Flexibility and Scalability

The cloud-based platform we are seeking must provide robust multi-project support, accommodating distinct data schemas and configurable user interfaces tailored to individual project requirements. It should enable hierarchical data structuring across multiple tiers, potentially including overarching contracts and their associated projects. This configuration should facilitate comprehensive performance monitoring across all projects within a contract and deliver an aggregated, real-time dashboard for consolidated reporting and oversight.

To ensure secure and efficient access, the platform must accommodate a range of user roles such as superusers, managers, coordinators, and volunteers, each with clearly defined permissions aligned to their responsibilities and access needs.



The diagram above (See page 9 for larger overview) illustrates examples of user permission levels. A **superuser** will require access to contracts and the projects within these, while a **manager** should only see the projects, they are personally responsible for. A **standard user**, on the other hand, will only need visibility into the specific project(s) they are actively working on. A **volunteer** may not need direct access to the platform but will need to input data ideally through a separate volunteer UI or on occasion through a form.

Volunteer Ecosystem Alignment

Our projects range from befriending and driving services to mentoring and intergenerational support. Volunteer engagement varies from one-off to ongoing commitments. The platform must support several types of projects, such as scheduling using a calendar for driving projects and event-based coordination for others.

We envision aligning all projects with our five-stage volunteer ecosystem:

VOLUNTEERING MATTERS

- Flexible and one-off volunteering
- Relationship-based volunteering
- Skilled or focused volunteering
- Leading and organising
- Systems change and social action

Volunteer & Beneficiary Journey & Recognition

The platform will be built around a Volunteer Management System (VMS) that creates detailed volunteer profiles and tracks their entire journey, from onboarding through activity logging to achievement recognition. It must also enable volunteers to report safeguarding concerns. In addition, the system will maintain beneficiary profiles, capturing their needs and associated information within the same platform.

Features such as automated reminders, milestone recognition, and communication tools will be required to enhance engagement.

Volunteer Portal

We have a diverse group of volunteers who have varying IT ability. It is crucial that our new platform does not become a barrier to their engagement. We will therefore need a platform that is easy to use, intuitive and accessible.

We anticipate there will be a web-based portal where volunteers can:

- View and apply for opportunities based on location, skills, and interests
- Update their profile
- Access resources and news
- View badges and logged hours
- Potentially communicate via a forum/chat function

We would need these portals to be customisable to align with the different projects that require a volunteer portal.

Reporting & Analytics

Robust reporting capabilities with the ability to anonymise beneficiary data will be essential in helping us make informed decisions, communicate our impact effectively and demonstrate outcomes to stakeholders.

While each project may have unique data needs for local reporting, the platform must also capture data applicable across all projects for wider reporting purposes. These will include data such as number of beneficiaries, number of support sessions provided, volunteer hours, age, location, ethnicity etc.

In the future we would like to be able to capture reports to demonstrate our effectiveness within our five change areas:

- Combat loneliness
- Break down barriers
- Create social cohesion
- Improve health and wellbeing
- Equip and enable communities

Immediate Priorities

Platform Specifications

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15 Full Licenses



90 Access Licenses



45+ Projects



5000 volunteers



100,000+ beneficiaries

Primary users: Volunteer Managers/Project Coordinators/Managers

Priority 1 Requirements: Essential to the success of the project.

Volunteer Management	P1.1	Volunteer recruitment and on-boarding management with clear status categories at each stage.
	P1.2	Volunteer skills library and availability tracking.
	P1.3	Document storage (volunteer agreements, background checks (DBS/PVG, risk management) as well as maintaining confidential notes.
	P1.4	Volunteer journey tracking including tracking volunteer hours and activity type. Ability to note achievements and flag safeguarding concerns or flag barred list.
	P1.5	Associate a volunteer to a project with high level information.
	P1.6	Align projects within our ecosystem.
Beneficiary Management	P1.7	Record basic information of beneficiaries by project e.g. contact details, associated project and ability to update notes.
Communication Tools	P1.8	Automated notifications and reminders to volunteers. E.g. Send automated emails via MS Outlook (with attachments) based on key trigger points, such as welcome emails, milestones (1 year volunteering), and satisfaction surveys.
	P1.9	Automated notifications and reminders to users (Quality assurance check when compulsory documents such as character reference or volunteer agreement are missing from volunteer record).
	P1.10	Mass communication capabilities using MS Outlook. E.g. for updated training modules or policy sharing.
	P1.11	Forms that can populate the digital platform.
	P1.12	Event announcements.
Reporting and Analysis	P1.13	Custom report generation - Generate real time statistical reports for volunteer and beneficiary, including breakdowns using a range of agreed datasets including details around volunteer and beneficiary personal information and activity.
	P1.14	Report on changes within our five areas of change.
	P1.15	Export to Excel functionality.
	P1.16	Dashboard with key metrics.
Accessibility	P1.17	Staff access via browser with considerations for a mobile app.
	P1.18	System fully accessible for use by multiple users, with considerations for people with physical and/or mental health conditions. (conform to WCAG 2.2 AA, including design principles, mobile optimisation assistive technology support such as JAWS/NVDA)
Data Migration	P1.19	Data migration to the new system from Excel/CSV format.
Security	P1.20	Multi-Factor Authentication (MFA)
	P1.21	Role-based access control
	P1.22	AES 256-bit data encryption

	P1.23	Regular secure system backups
	P1.24	Meets UK GDPR standards including data retention
	P1.25	Uses the TLS 1.3 protocol
	P1.26	Conforms to BS ISO/IEC 27001
	P1.27	Meets Cyber Security Essentials
	P1.28	Annual penetration testing
	P1.29	Data stored within the UK/EU

Priority 2 Requirements: Highly important but could be delivered at a later stage.

Volunteer Management	P2.1	Checkbox/status update on volunteer record to indicate Volunteering Matters barred list status.
	P2.2	Checkbox/status update on volunteer record to indicate if a safeguarding concern is in progress.
	P2.3	Volunteer character reference requests are sent and received from the system and updates/notifications sent to users.
	P2.4	Managed recruitment process with messaging to applicants regarding stages e.g. when application is made, when references have been sent/received, when volunteer is ready for training.
	P2.5	Automated follow-up contact to volunteer from expression of interest form on website with application form/more details.

Budget Guidance

Cost Category	Indicative Budget Range
Implementation (including configuration, data migration, API integration, and training)	£35k - £60k
Annual Subscription & Licensing (including user licences, volunteer portal access, and ongoing support)	£15k - £35k per year

Please note: These figures are indicative only and provided to guide suppliers in preparing realistic proposals. Volunteering Matters reserves the right to evaluate all proposals based on value for money and alignment with requirements.

Responding to the Tender

Please submit a written proposal using the tender response document provided, covering the following:

1. Cover Letter

Include a brief introduction of your organisation and contact details of the lead person.

2. Track Record and Experience (Max 20 points)

Provide an overview of your organisation's history and mission, experience working with charities or public sector clients, relevant qualifications, and accreditations.

Include two references (name, organisation, contact details), two case studies of similar projects, and short bios of key personnel involved in delivery.

3. Proposed Approach to Fulfil Requirements (Max 30 points)

A. Priority 1 Requirements: Describe how your solution meets each essential feature such as volunteer management, beneficiary management, communication tools, reporting and analysis, accessibility, data migration, and security. (See **Appendix 2** for guidance on meets and exceeds recommendation)

B. Priority 2 Requirements: Explain how these features will be delivered in future phases and provide a timeline or roadmap.

4. Cost Breakdown (Max 20 points)

Please provide a detailed breakdown of all costs associated with the delivery and ongoing support of the proposed solution. Your response should include:

Cost Category	Details Required
Initial Setup Costs	<ul style="list-style-type: none"> Platform configuration and customisation Data migration from existing systems (Excel/CSV) Integration with required APIs (REST/JSON) Training and onboarding for staff and volunteers
Licensing and Subscription Fees	<ul style="list-style-type: none"> Annual or monthly licence costs Volunteer portal access costs (if applicable)
Ongoing Support and Maintenance	<ul style="list-style-type: none"> Technical support and helpdesk services Regular updates and security patches System backups and compliance checks
Optional Services	<ul style="list-style-type: none"> Future enhancements aligned with Priority 2 requirements Consultancy or bespoke development options
Other Charges	<ul style="list-style-type: none"> Any additional fees (e.g., hosting, third-party integrations)
Cost Optimisation	<ul style="list-style-type: none"> Indicate any service frameworks or pricing models that could improve value for money Provide options for phased implementation to spread costs

5. Relationship Management and Aftercare (Max 20 points)

Describe your support model and aftercare services including updates, maintenance, and user feedback loops. Options for how you would or could work with us, which may also mean there are options in terms of costing.

6. Alignment to Volunteering Matters' Values (Max 10 points)

Explain how your organisation embodies the values of empowering, inclusive, compassionate, positive, and straightforward. Provide examples or initiatives that demonstrate these values. (Please refer to **Appendix 1**)

7. Implementation Plan

Provide a project timeline with key milestones, a workplan with actions, responsibilities, and timescales, and a transition and onboarding strategy including training and support.

8. Compliance and Governance

Provide evidence that the digital platform fully meets our compliance and governance requirements (please refer to **Appendix 3**)

9. Declaration

Confirm that all information provided is accurate and that we are committed to the terms of the tender document.

10. Other

Please submit your proposal by email to crm@volunteeringmatters.org.uk by 5pm on 31/01/2026. Presentations for shortlisted candidates are planned for the week commencing 02/03/2026. We will let you know if you have been shortlisted by 13/02/2026 at the latest. (refer to key dates timetable for more information) If you have any questions about the tender brief, please email crm@volunteeringmatters.org.uk by 16/01/2026. We will share answers to all questions raised with all potential suppliers who have indicated they will be responding to the tender by 21/01/2026. If you would value the opportunity to speak with the team about our requirements, please get in touch with Chris chris.kemble@volunteeringmatters.org.uk to arrange a meeting during the tender period.

Proposal costs

Volunteering Matters will not be liable for any costs you incur in the preparation or submission of your proposal, including travel or expenses, or for any costs that arise out of any consequential presentations and demonstrations that may be requested by Volunteering Matters.

Proposal validity

Your proposal should remain open for acceptance, for a minimum period of 90 calendar days. A quotation valid for a shorter period may be rejected. In your response you must state the length of quotation validity you will apply.

Confidentiality

All information provided by potential providers will be treated as “Commercial in Confidence” by Volunteering Matters and will not be disclosed to any third party without the prior written permission of the supplier in question. Suppliers must not disclose quotations to third parties, and they must not try to obtain information about competitors’ quotations. You must treat all information that we provide to you as strictly confidential – this applies to all information equally. Information about Volunteering Matters gained from this process should only be shared with staff members working on the quotation. It must not be shared with third parties.

Copyright

Prospective companies are reminded that the entire contents of this invitation to tender belong to Volunteering Matters. It must only be used for the purpose for which it was issued.

Acceptance and rejection of any or all proposals

Volunteering Matters reserves the right to accept or reject any proposals and to annul the proposal process and reject all proposals at any time prior to award of contract without incurring any liability to the affected companies. Volunteering Matters does not bind itself to accept the lowest priced proposal, or any proposal.

Scoring & Evaluation criteria

All proposals will be evaluated by a panel using the criteria and scoring system outlined below. Each section has a maximum score, and responses will be assessed based on their relevance, clarity, completeness, and alignment with Volunteering Matters’ requirements and values. There is a total of 100 points available.

Weighting

We will score all proposals according to the criteria below.	Criterion	Marks available
Section 1	Your record of accomplishment and experience	Max 20
	Excellent: A comprehensive, detailed, and well-structured response that fully addresses all required elements and demonstrates extensive experience in delivering projects for charities and public sector organisations.	20
	Good: A well-developed response that is detailed and relevant, covering most required elements and showing some experience in delivering projects for charities and public sector organisations.	15
	Adequate: A good response that includes some required elements but lacks depth or completeness, and shows only limited experience in delivering projects for charities and public sector organisations	10
	Limited: A response providing minimal information, missing most required elements, and lacking sufficient	5

	detail or relevance to charities or public sector organisations.	
	No response: No response received.	0

Section 2	Proposed approach – alignment to brief	Max 30
Priority 1 (scored on each requirement)	Exceeds requirements	3
	Meets requirements	2
	Partially meets requirements	1
	Does not meet requirements	0
Priority 2 (scored on each requirement)	Meets requirements	2
	Potential to meet requirements	1
	Unlikely to meet requirements	0

Section 2 Total points	Score
90 – 100	30
80 – 89	25
70 - 79	20
60 - 69	15
50 - 59	10
40 - 49	5
Under 40	0

Section 3	Cost - value for money for solution & package	Max 20
	Under budget	20
	Within budget	15
	Slightly over budget	10
	Within budget but concerns over annual costs	5
	Vastly outside budget	0

Section 4	Relationship management and aftercare	Max 20
	Support on demand, with a personal contact	20
	Support provided but can take up to 48 hours	15
	Support provided but no agreed timeframe	10
	Ad hoc with additional costs not factored in	5
	No aftercare provided	0

Section 5	Values alignment	Max 10
	Excellent: A comprehensive, well-structured response that is detailed, insightful, and highly relevant.	10
	Satisfactory: A basic response that addresses the section but lacks sufficient detail or clarity.	5
	Not answered or irrelevant: No meaningful response provided, or the content is unrelated to the section.	0

Appendix 1 - Our Values

Empowering

Supporting our team and our communities to make change happen by sharing skills, knowledge, and time. Listening, trusting, cooperating, collaborating, building self-confidence, and accountability to make positive change.

Inclusive

Actively removing barriers and providing equality of opportunities for everyone. Bringing people together, creating new relationships and new opportunities. Working together with a shared purpose to make the biggest impact possible.

Compassionate

Putting people at the heart of everything we do. Listening. Caring. Giving time, empathy, appreciation and value to our team and our communities.

Positive

Recognising and embracing the potential in our team, our communities, a situation, or a new idea. Being curious about things. Spotting new ideas and solutions and having fun along the way.

Straightforward

Being openminded, honest, and accountable. Having a flexible, uncomplicated approach in our communication style and the way we do things.

Appendix 2 Guidance on “Exceeds and Meets Requirements” Scoring

To ensure transparency, this appendix provides examples of what constitutes “Exceeds Requirements” compared to “Meets Requirements” for the key areas of the tender. **These examples are intended as guidance only and do not introduce additional mandatory requirements.** Proposals that demonstrate innovation, added value, and proactive solutions beyond the stated specifications will score higher under the evaluation criteria.

Volunteer Management

Meets: Provides all requested features (recruitment, onboarding, skills tracking, document storage, volunteer journey tracking).

Exceeds:

- AI-driven volunteer matching based on skills and availability.
- Integrated mobile app for volunteers.
- Automated compliance checks and alerts beyond basic triggers.

Beneficiary Management

Meets: Records basic beneficiary information and notes.

Exceeds:

- Advanced case management tools.
- Secure beneficiary self-service portal.
- Predictive analytics for beneficiary needs.

Communication Tools

Meets: Automated notifications, mass email via Outlook, forms integration.

Exceeds:

- Multi-channel communication (SMS, WhatsApp, push notifications).
- Built-in engagement analytics.
- Personalised communication workflows.

Reporting & Analysis

Meets: Custom report generation, Excel export, dashboards.

Exceeds:

- Real-time interactive dashboards with drill-down capability.
- Predictive analytics and trend forecasting.
- Built-in impact measurement aligned to Volunteering Matters’ five change areas.

Accessibility

Meets: WCAG 2.2 AA compliance, browser access, mobile optimisation.

Exceeds: Demonstrates:

- Accessibility beyond WCAG (e.g., voice navigation, AI-driven accessibility enhancements).
- Fully native mobile app with offline capability.

Security

Meets: MFA, role-based access, AES 256-bit encryption, GDPR compliance.

Exceeds: Includes:

- Continuous vulnerability scanning and automated patching.
- Independent security certifications beyond ISO 27001 and Cyber Essentials.

Implementation & Support

Meets: Provides a clear implementation plan and standard support.

Exceeds: Offers:

- Dedicated account manager and proactive support.
- Comprehensive onboarding with tailored training.
- Continuous improvement roadmap and quarterly review meetings.

Compliance and Governance

Volunteering Matters is committed to upholding the highest standards of compliance and governance in all its operations. As such, we require that any proposed digital platform and associated services adhere to the following principles and frameworks.

Legal and Regulatory Compliance

The platform must comply with all relevant UK legislation, including but not limited to:

- UK General Data Protection Regulation (UK GDPR)
- Data Protection Act 2018
- Privacy and Electronic Communications Regulations (PECR)
- The Data Use and Access Act 2025 (DUAA)

Providers must demonstrate how their solution ensures compliance with these regulations, including data processing agreements, consent management, and data subject rights.

Information Governance

The platform must support robust data governance practices, including:

- Role-based access control
- Audit trails for data access and changes
- Data retention and deletion policies aligned with legal requirements
- Secure data storage within the UK or EU

Risk Management and Assurance

Providers must outline their approach to identifying, mitigating, and managing risks, including:

- Cybersecurity threats
- Business continuity and disaster recovery
- Third-party integrations and dependencies

Standards and Certifications

The solution should conform to recognised standards, including:

- ISO/IEC 27001 (Information Security Management)
- Cyber Essentials or Cyber Essentials Plus
- WCAG 2.2 AA for accessibility

Evidence of certification or equivalent internal policies should be provided.

Governance and Oversight

Providers should describe their internal governance structures, including:

- Data protection officer (DPO) or equivalent role
- Escalation procedures for incidents or breaches
- Regular internal audits or compliance review

Diagram 1 – Digital Platform User Permissions

