

HOSTED WITH ROSTERFY

How to Build a Volunteer Onboarding Journey That Meets Rising Service Demand

A practical session on auditing friction, speeding up onboarding, automating intelligently, and benchmarking against the Canadian nonprofit sector.



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Betsy McFarland, CVA

Principal, Adisa · www.adisagroup.com



Trevor Bobb

Solutions Engineer, Rosterfy

Thursday, September 10, 2026 · 1:00-2:00 PM ET / 10:00-11:00 AM PT · Live webinar

Before we start

- | | | |
|---|------------------------------|--|
| 1 | Recording | This session is recorded. A link goes to every registrant tomorrow, captioned on request. |
| 2 | Live chat | Drop questions and your own onboarding pain points in chat as we go. We'll pull several into the discussion. |
| 3 | Interactive by design | This isn't a straight lecture. Betsy, Shannon, and Trevor will open the floor after each section - jump in. |

60 minutes, mostly yours

1:00	Welcome, housekeeping, meet the speakers
1:05	Why this matters now: service demand vs. volunteer supply
1:15	Obj. 1. Audit your friction points (open discussion)
1:25	Obj. 2 & 3. Onboarding velocity + intelligent automation
1:40	Live in the platform with Trevor: what this looks like
1:53	Obj. 4. Sector benchmarks + open Q&A
1:58	Recap, resources, and next steps

Who's in the room

SD MARKET INSIGHT

Shannon Dority

Marketing Manager, Rosterfy

Works across Rosterfy's partner and customer ecosystem on volunteer program strategy, regularly engages with nonprofits to understand modern day challenges.

BF SECTOR EXPERTISE

Betsy McFarland, CVA

Principal, Adisa (Energize)

Nonprofit consultant and speaker with more than 25 years of experience in volunteer engagement and animal welfare. Betsy helps organizations strengthen volunteer engagement, leadership, and organizational effectiveness, drawing on both national nonprofit leadership and hands-on consulting experience.

TB PLATFORM

Trevor Bobb

Solutions Engineer, Rosterfy

Builds and demos onboarding, screening, and scheduling workflows for volunteer programs day-to-day today's guide for the live platform walkthrough.

Why this matters now

Service demand is rising while the volunteer pipeline is under more strain than it looks from the coordinator's desk.



Good intentions aren't the bottleneck - friction is

Canadians still show up. The constraint is what happens between "applied" and "ready to volunteer."

73%

of Canadians volunteered in 2023

Statistics Canada, Survey on Giving, Volunteering and Participating

1.2B

hours contributed to formal volunteering nationally

Statistics Canada, Survey on Giving, Volunteering and Participating

\$31.7B

total economic value of formal volunteering in Canada (2023)

Statistics Canada, Satellite Account of Non-Profit Institutions and Volunteering

DISCUSSION PROMPT

What's changed for your organization in the last 12 months? More applicants, fewer staff hours to process them, or both? Drop it in the chat.

Rising demand. Shrinking supply.

Canada and the United States has seen a notable increase in the number of people wanting to engage in volunteering, however, volunteer hours are shrinking so there's a friction point in meeting expectations or the modern-day lifestyle.

01

Identify and audit friction points

Pinpoint the hidden bottlenecks in your application and vetting pipeline that cause volunteer drop-off, before you try to fix anything.

Where the pipeline actually leaks



Application → Screening

A gap here reads as "we never heard back," the single most common reason enthusiastic applicants disappear.

Screening → Training

Manual document chasing (references, background checks, waivers) stalls candidates for days or weeks with no visible status.

Training → Placement

Compliance is confirmed, but nobody follows up with a role and a date. Momentum built during onboarding is lost.

Open floor: where does your own pipeline stall first and do you actually measure it, or just feel it?

02-03

Onboarding velocity, without cutting corners

Speed up the trip from "applied" to "ready to volunteer," and use automation to protect that speed without losing the human, inclusive parts of the experience.

Speed and safety are not a trade-off

Velocity means removing dead time between steps a volunteer can't see - not skipping the steps that keep people safe.

MANUAL PROCESS

- Application sits in an inbox until someone has time
- Reference and background checks chased by hand, one email at a time
- Training scheduled around a coordinator's calendar, not the volunteer's
- No visibility for the volunteer between steps

AUTOMATED SEQUENCE

- ✓ **Application triggers the next step immediately, day or night**
- ✓ **Reference and check requests fire automatically, with reminders**
- ✓ **Volunteers self-select training slots from what's actually open**
- ✓ **Status is visible to the volunteer at every stage**

PROOF POINT - NORTH AMERICA

Blessings of Hope, a U.S. food rescue organization, automated its onboarding sequence to remove the manual, week-by-week follow-up that historically capped how many volunteers a coordinator could bring online at once.

Automate the admin, not the relationship

"Intelligent" automation means the system does the repetitive, time-boxed work and a human still shows up at the moments that build belonging.

Automate

Document chasing, shift confirmations, compliance-expiry reminders, status updates.

Keep human

The welcome message, the first-shift check-in, recognition, and any sensitive conversation.

PROOF POINT

British Heart Foundation cut the time to fully onboard a new volunteer in half, while every candidate still completed successful screening after automating its onboarding and compliance workflows.



Automating an Alzheimer's Society program

Rosterfy helped the Alzheimer Society of BC and Yukon centralize volunteer management across 19 provincial locations, cutting admin work, boosting volunteer engagement, and lowering attrition, all while meeting enterprise-grade security standards.

WHAT THEY DID

- Automated onboarding with custom workflows
- Introduced a robust privacy infrastructure
- Created a 'shop window' for new opportunities
- Ensured communication with senior volunteers
- Gathered volunteer feedback more effectively

OUTCOME

- ✓ **Greatly reduced day to day admin**
- ✓ **Increased the number of role applications**
- ✓ **Significantly improved data handling**
- ✓ **A highly satisfied volunteer base even within older demographics**
- ✓ **Achieved the highest level of engagement to date**

Over to Trevor

Trevor will walk through a complete volunteer journey built in the platform, from application through first shift, showing the automations in action along the way. Drop questions in chat as we go, or save them for the open floor right after.

04

Leverage sector benchmarks

See how your onboarding capacity, scheduling autonomy, and infrastructure maturity compare to peer organizations across the Canadian nonprofit landscape.

Where does your program sit?

The figures below are national volunteering context; the segment-by-segment infrastructure-maturity benchmarks referenced live come from Rosterfy's Volunteer Recruitment Playbook and recent nonprofit infrastructure research.

67%

Of organizations report a volunteer shortage

51%

Struggle with volunteer retention

35%

Report a reduction in programs as a direct result of a volunteer capacity gap

Source: Statistics Canada, Survey on Giving, Volunteering and Participating (2023).

DISCUSSION POINT

If you could solve one of these, which would have the biggest impact and why?

Your turn: what's still unresolved?

-
- 1 Where is your own pipeline leaking: application, screening, training, or placement?
 - 2 What's one manual task you'd automate first if you could?
 - 3 How does your infrastructure compare to what you just heard from Betsy and Shannon?
-

What to take back to your team

01

Audit

Map your pipeline and find the actual drop-off point. Usually a visibility gap, not a goodwill gap.

02

Speed

Compress the trip from applied to ready-to-volunteer by removing dead time, not by skipping checks.

03

Automate

Hand the repetitive admin to the system; keep the welcome, the check-in, and recognition human.

04

Benchmark

Compare your capacity and maturity against peers before you decide what "good" looks like for you.

THANK YOU



Keep the conversation going

Get the recording

The good people at Charity Village will arrange

Download the Volunteer Recruitment Playbook

The full framework behind today's session.

Connect with Betsy

Volunteer engagement strategy, consulting, and training
betsy@adisagroup.com | www.adisagroup.com.

Talk to Rosterfy

Bring your own volunteer process to our team for evaluation
Visit www.rosterfy.com and request a demo



Shannon Dority · Betsy McFarland, CVA (Adisa) · Trevor Bobb