rosterfy

CHARITYVILLAGE PRODUCT DEMO

# Hands-on with Pip

How Rosterfy's AI agent can help you build an effective volunteer program

Tuesday, October 13, 2026 · 1pm ET / 10am PT

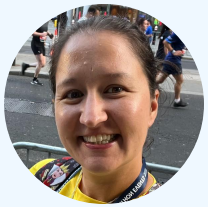
Shannon Dority, Marketing Manager · Trevor Bobb, Solution Engineer

# Welcome, and a few housekeeping notes

### 30 minutes
A short intro, a live demo of Pip, then your questions.

### Ask anytime
Drop questions in the Q&A box. We'll answer them at the end.

### It's recorded
Everyone registered gets the recording by email tomorrow.



**Shannon Dority**
Marketing Manager, Rosterfy
Guest speaker



**Trevor Bobb**
Solution Engineer, Rosterfy
Your demo guide

# Less admin. More volunteers. Real impact.

Rosterfy is an end-to-end volunteer management platform that automates administration, streamlines operations, and helps organizations recruit, engage, and retain volunteers at scale.

**75%** of your day-to-day admin, automated with Rosterfy

TRUSTED BY

houston foodbank

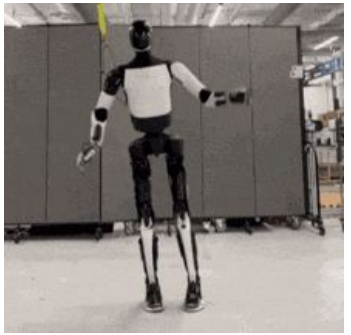
Alzheimer Society BRITISH COLUMBIA



# AI has moved from novelty to everyday tool

**1 in 4**

**Canadian workers now use generative AI at least a few times a week**



Don't worry, Pip is built for task management, not dancing

Where does our data go?

Can we trust it?

What about the human side?

Source: Statistics Canada, Labour Force Survey supplement, March 2026 (released July 30, 2026)

QUICK POLL

# Does your organization have an AI usage policy?

- Yes, a formal policy
- It’s in progress
- No, not yet
- Not sure

# Most people use AI for a few specific tasks

**64%**

of Canadian workers who use AI use it for some tasks, not most

**12%**

use it across most or nearly all of their daily work

**That's exactly where Pip starts: specific, everyday tasks you already know well, with you in control.**

Source: Statistics Canada, Labour Force Survey supplement, March 2026 (released July 30, 2026)

# An AI agent to help you, not overwhelm you

01

### Start narrow

Pip begins with the day-to-day admin you already know: events, shifts and forms.

02

### You stay in control

Pip drafts, you review. Nothing goes live until you say so.

03

### Grow with feedback

We expand what Pip can do based on what our customers tell us they need next.

MEET PIP

# Inspired by service.
# Powered by AI.

When we set out to introduce an AI agent into Rosterfy, we knew it needed more than a generic, robotic name. It needed to represent the heart of the sector we serve.

> Charles "Pip" Coghlan OAM, our founder's great-uncle, devoted 69 years of his life to community-based nonprofits, setting a world record for his service.

Just like his namesake, Pip works quietly in the background, handling the heavy lifting, bringing order to complexity, and supporting organizations so teams can focus on what matters most.

**Because sometimes, we all need a little help!**

LIVE DEMO · TREVOR BOBB

# Pip, live

### Create an event
Shifts and roles set up from one prompt

### Build a form
A registration form drafted in seconds

### Edit and ask
Clone, update, and ask Pip questions

# Pip in action

Q&A

# Your questions

Pop them in the Q&A box. Anything we can't get to today, we'll follow up on by email.

# Thank you. Here's what's next

### See Pip with your own program

Book a personal demo with our team at rosterfy.com/request-demo

### Have your say on technology

VMPC's State of Volunteer Management survey, focused on technology, opens in late October. Supported by Rosterfy.

### Watch it again

CharityVillage will send you the recording, so you can share it with your team.