



Optimizing Volunteer Screening and Onboarding

A guide to volunteer management
for Canadian Charities

Introduction

Without volunteers, many an organization's mission would just be words on paper, waiting to be acted upon. While 41% of Canadians formally volunteer their time each year,¹ the need for volunteers remains particularly high in social services and health sectors, with both experiencing substantial increases in demand in 2023.²

14.5%

Nonprofit organizations (NPOs) in Canada are significant employers, **accounting for 14.5% of all jobs in 2021**,³ with a notable share employed by entities serving the government.

Despite the critical role volunteers play, many charities face challenges in effectively managing their volunteer workforce. This whitepaper aims to provide actionable insights to help Canadian NPOs optimize their volunteer screening and onboarding processes, ensuring a reliable, engaged and effective volunteer force.

Screening Challenges

While engagement and participation rates in volunteerism overall are promising, many organizations face significant challenges in managing their volunteer programs.

It is the responsibility of volunteer managers to not only enhance participation but also ensure that volunteers are reliable, safe and well-suited for their roles. These challenges are further complicated by the need for thorough and standardized screening.



For instance, visible minorities **only hold 10% of board positions,**⁴ highlighting the ongoing struggle with diversity and inclusion with volunteer roles.

Insufficient Screening Procedures

One of the most prevalent issues in volunteer management is the lack of comprehensive screening procedures. Many charities rely on minimal criteria or manual processes without standardized protocols, leading to volunteer unreliability and safety concerns. This can be attributed to high workloads among volunteer managers, the absence of a unified approach and the over-reliance on ad hoc methods for vetting volunteers.

Implementing comprehensive vetting protocols with integrated tools like Rosterfy can address these issues. By standardizing screening processes and utilizing technology, charities can ensure more reliable and safer volunteer engagement.

Lack of Thorough Background Screening

Volunteer managers often struggle to conduct thorough background checks due to perceived complexities and heavy workloads.



50.8%

of charity managers or coordinators in Canada are already concerned about staff burnout.⁵

Under these conditions, inconsistencies are understandable, but they still lead to miscommunication about role requirements and volunteers being misplaced in roles they're not suited for.

Tools that automate background checks and clearly communicate role expectations can significantly reduce these challenges. This provides a safe environment for the whole community while saving time on manual processes for both volunteers and managers.



Consistency and Standardisation



When asked about their main reasons to contribute their time to voluntary activities, **78% of Canadians mentioned using skills** and experiences. **59% referenced a personal affection** for the organization's cause.⁵

Inconsistent Screening Practices



While 22% volunteer to improve job opportunities,⁵ organizations can only deliver on that goal if they analyze and match each individual's skills to a suitable role.

That means, for volunteer managers, it's increasingly important to engage and place volunteers in a meaningful way. However, this brings more challenges to already overworked staff.

Especially in heavily regulated niches like child-related volunteer work, inconsistent screening practices across different branches or programs can lead to confusion among volunteers and frustration among managers. This decentralization results in varied screening standards and communication strategies, impacting volunteer engagement and retention.

Adopting a **centralized volunteer management system like Rosterfy** and standardizing practices across the organization can mitigate these issues. Consistent screening protocols ensure that all volunteers are vetted equally and thoroughly, enhancing overall reliability. Rosterfy's customizable screening processes enable organizations to maintain uniformity while meeting specific needs.

Additionally, Rosterfy's automated communication tools play a critical role in the screening process. By automatically sending reminders, updates, and instructions at each stage of the screening journey, Rosterfy ensures that volunteers are fully informed about the steps they need to complete. This reduces the likelihood of delays or incomplete screenings due to miscommunication, helping to streamline the vetting process.

Automated communications also allow organizations to maintain transparency with volunteers, providing them with real-time feedback on their application status and next steps. This level of engagement not only enhances the volunteer experience but also supports a more organized and consistent screening process, ultimately leading to a more qualified and committed volunteer force.



Misalignment and Misplaced Volunteers Due to Unclear Role Descriptions



When asked how likely their organization would try a new idea despite lack of funding, **34% of volunteers still considered it very likely.**⁶

For your organization to tap into those ideas, though, you need to ensure that qualified volunteers can identify with the job postings and campaigns you put out there.

Vague or outdated role descriptions can lead to volunteers being unsure of their responsibilities, resulting in inefficiency and dissatisfaction. Clear and current role descriptions are essential for aligning volunteer skills with organizational needs.

Regular updates to role descriptions and clear communication of expectations can ensure that volunteers are well-informed and properly placed. This alignment maximizes volunteer effectiveness and satisfaction. Rosterfy helps you achieve these objectives with streamlined recruitment and customisable onboarding journeys for different roles.⁷

These tools have already helped Canadian organizations engage volunteers for everything from medical care to logistics and emotional support when wildfires and floods intensified in Canada and quick volunteer placement was of the utmost importance.⁸

Onboarding Efficiency

Lengthy and Complicated Manual Processes



While Canadians are already more than generous with volunteering their time, **27% stated they would rather give their time** than donate more money. **23% worried that donations would not be used efficiently.**⁹

On both sides of the interaction, this makes effective onboarding critical. It helps place those who want to share their expertise in a meaningful way while convincing skeptics that your organization is making a difference.

However, manual onboarding processes are often still lengthy and complicated, leading to high drop-off rates among potential volunteers. Slow processing times and extensive paperwork can deter volunteers from completing the onboarding process entirely. That's especially true for millennials and Gen X volunteers, who prefer an easy-to-use software registration workflow.¹⁰

Adopting digital onboarding platforms like Rosterfy to streamline workflows can significantly improve the onboarding experience. With Rosterfy's configurable journey modules, organizations can create custom, automated onboarding processes tailored to specific volunteer roles. Whether you need background checks for roles involving children or require a driver's license for driving roles, Rosterfy simplifies the onboarding process by automatically progressing volunteers through customized steps.



This multi-journey onboarding approach breaks away from the usual linear process, recognizing that every volunteer is unique. It allows organizations to provide personalized, engaging onboarding experiences that are both efficient and compliant. Through interactive modules, virtual training, and dynamic content, volunteers receive the preparation they need, boosting their commitment and readiness to contribute.

Efficient, user-friendly digital processes like those offered by Rosterfy reduce drop-off rates and ensure that volunteers are ready to contribute more quickly, ultimately enhancing volunteer satisfaction and retention.

Poor Communication

Lack of clear communication channels and follow-ups during the onboarding process can leave volunteers feeling unengaged and uninformed. With manual processes and volunteer managers already worrying about staff burnout, personalized messaging doesn't always make the top of the priority list. Yet, effective communication is crucial for maintaining volunteer interest and commitment.

Implementing regular communication protocols and utilizing volunteer management software like Rosterfy can enhance engagement.

Regular updates and follow-ups can be automated based on predetermined triggers to keep volunteers informed and connected to the organization and its cause.

Training and Development

In many ways, the Canadian nonprofit sector still seems ill-prepared to leverage the expertise it already has.

Insufficient Orientation and Training Programs

Basic, one-size-fits-all orientation sessions often leave volunteers feeling unprepared and underutilized. Tailored training programs are necessary to equip volunteers with the specific skills they need to succeed in their roles and paid staff with those that would justify fair wages.

Developing individualized orientation programs and offering continuous training opportunities through Rosterfy can better prepare volunteers. Rosterfy's personalized training modules ensure that volunteers feel competent and valued, leading to higher satisfaction and retention rates.



\$12,500

While 73.6% of employees in nonprofits had a college or university degree in 2021, compared to 55.8% in the total economy, their wages didn't reflect their qualifications. **As a result, NPOs still paid almost \$12,500 less than the economy-wide average.**¹¹



Lack of Role-Specific Training

37%

While over half of Canadians aged 65 to 75 and older still feel a strong sense of belonging to their local community, **that's only true for 37% of those aged 25 to 34.**¹²

That means volunteer managers need to work harder to identify what the next generations are looking for. This can mean tailoring your organization's messaging to emphasize skills and training that may help volunteers boost their CVs. It can also mean creating a safe volunteering environment with parental consent and group volunteering.¹³

An individualized volunteer journey not only helps engage younger audiences but also often overlooked demographics, but no matter who it is, generic training will exacerbate the problem.

Generic training programs can result in volunteers being mismatched to roles they are not equipped for, leading to inefficiencies and dissatisfaction. Role-specific training is essential to ensure that volunteers have the necessary skills for their assigned tasks.

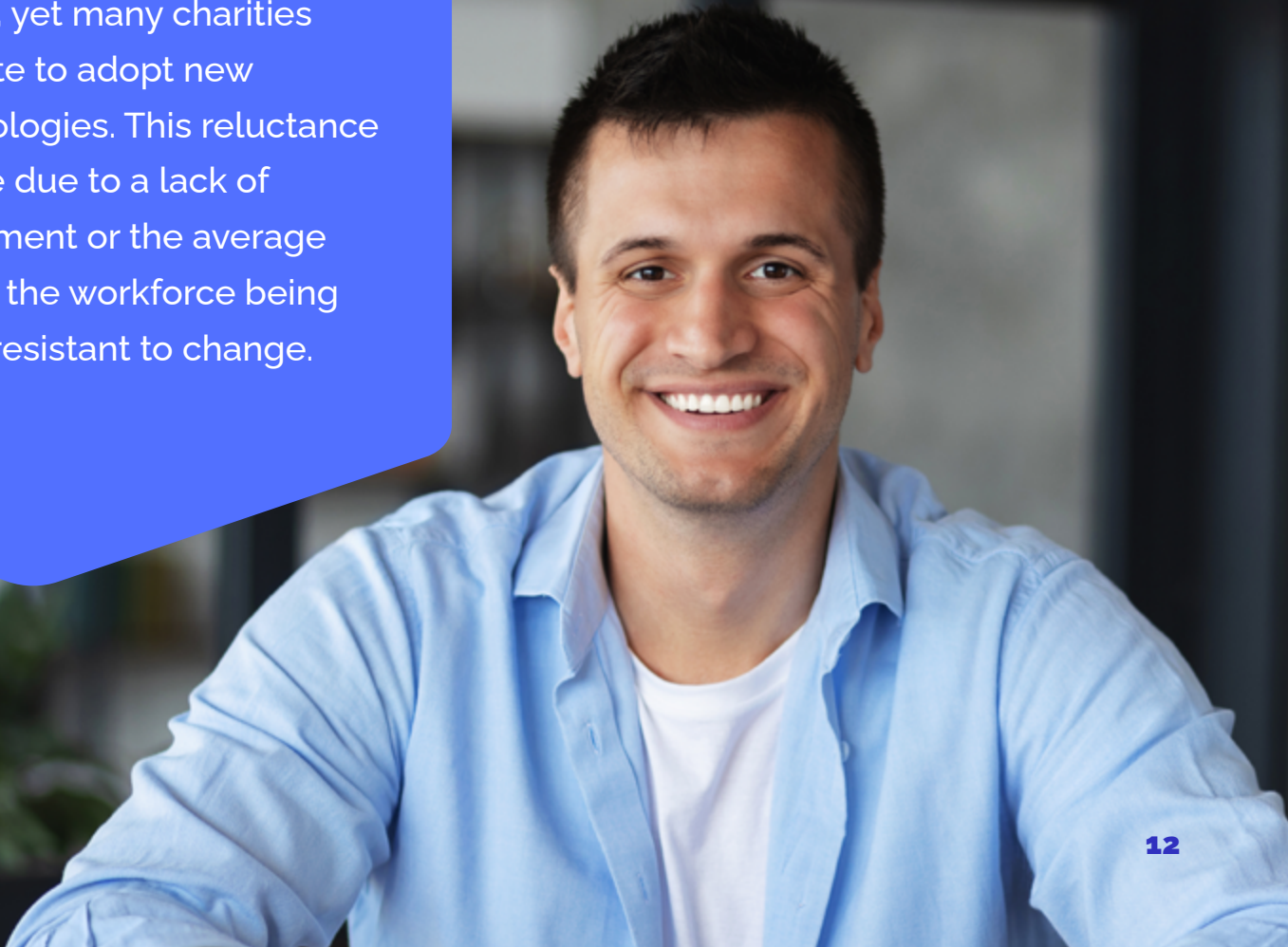
Creating role-specific training modules and conducting regular assessments can improve volunteer placement and performance. This targeted approach ensures that volunteers are well-prepared and confident in their roles.

Resource and Technological Constraints

Many charities face budget constraints that limit their ability to invest in volunteer management. Prioritizing direct service delivery often means that volunteer management resources are insufficient.

Leveraging technology and seeking grants and partnerships can help overcome resource limitations. Investing in volunteer management software like Rosterfy and forming strategic partnerships can enhance efficiency without straining budgets while providing staff training that can modernize volunteer management processes.

Manual processes are inefficient and prone to errors, yet many charities hesitate to adopt new technologies. This reluctance can be due to a lack of investment or the average age of the workforce being more resistant to change.



Compliance and Ethical Practices

11.6%

Even though charities themselves are doing the best they can to eliminate inequality or ethical concerns, some issues remain unresolved. As an example, **homelessness support sector workers continue to be more likely to live in poverty (11.6%)** than the workers in all other sectors (10.7%).¹⁴

The Canadian government does its best to address those inequalities with regulations against discrimination based on race¹⁵ or gender,¹⁶ but as society evolves, so do those laws. Non-compliance with legal requirements poses significant risks to charities, including potential legal issues. Many organizations lack awareness of the legal standards they must adhere to.

In addition, volunteers may feel exploited or undervalued if ethical guidelines are not enforced. Ensuring fair treatment and recognising volunteer contributions are crucial for maintaining a positive and respectful volunteer environment.

Regular training and systems for compliance monitoring, as provided by Rosterfy, can ensure that organizations meet all legal requirements. Staying informed and compliant protects both the organization and its volunteers. Developing and enforcing ethical guidelines, along with recognising volunteer contributions, can enhance volunteer satisfaction and loyalty. Ethical practices foster a positive organizational culture and improve volunteer retention.

Case Study: **MUDGIRL**

Background

SPORTERA, the organizer of the international MUDGIRL races, relies on over 2,000 volunteers to bring their events to life across Canada, the USA, France and the UK. Managing such a diverse and widespread volunteer base presented significant challenges, particularly in maintaining consistent screening and onboarding processes across different countries.

Challenge

Prior to using Rosterfy, SPORTERA faced a complicated and time-consuming onboarding process that varied from one event location to another. This inconsistency made it difficult to maintain quality control, ensuring that every volunteer was properly screened, trained and ready to fulfill their roles.

Solution

Rosterfy transformed MUDGIRL's volunteer management with their Journey Module, which allowed SPORTERA to build customized volunteer onboarding processes tailored to the unique needs of each event and location. The Journey Module enabled them to set specific checkpoints, request necessary details and deliver training and content when needed, ensuring a consistent experience for all volunteers regardless of where the event took place.

Rosterfy allowed SPORTERA to streamline the recruitment, screening and training of volunteers, creating a volunteer onboarding journey that met the same high standards whether in Toronto, New York, Paris or London. Rosterfy's automated workflows guided volunteers through each step of the process—from initial application to final placement—significantly reducing manual administrative tasks and minimizing the risk of errors or oversights.



“We’re able to set up events in all our countries using just one platform. No juggling with different tools—it’s all streamlined and unified, making our global reach smooth and hassle-free.”

-Quentin Poilblanc, Sport Sponsorship & Partnership Manager, SPORTERA

Additionally, Rosterfy’s group and family volunteering features enabled SPORTERA to efficiently onboard diverse volunteer teams, including families and sports clubs. This was particularly important for MUDGIRL, an event that often attracts participants who want to volunteer together. Rosterfy’s system ensured that these groups could be onboarded simultaneously, with all necessary checks and compliance steps—such as regulations for underage volunteers—handled automatically.

By automating key communications, including logistics, event updates and training reminders, Rosterfy significantly reduced the administrative workload on SPORTERA’s team. These automated touchpoints kept volunteers informed and engaged, leading to a smoother onboarding experience and better-prepared volunteers on event day.

This level of automation also played a crucial role in volunteer retention. By making the onboarding process simple and efficient, volunteers were more likely to return for future MUDGIRL events, knowing they could expect a seamless experience from start to finish.

Rosterfy has been instrumental in helping SPORTERA elevate their volunteer onboarding process, ensuring that MUDGIRL events run smoothly and that every volunteer is ready to contribute their best effort, no matter where the race takes place.

Results

Rosterfy’s volunteer management platform provided SPORTERA with the tools needed to effectively onboard a large, international volunteer base, enhancing both volunteer satisfaction and event success.

“Rosterfy is our best tool for volunteer recruitment and retention. If you’re a company that has events and volunteer support, Rosterfy is a great platform to use. It makes my life so much easier.”

-Quentin Poilblanc

Conclusion

Optimizing volunteer screening and onboarding processes is essential for the success of Canadian charities. By addressing the challenges outlined in this whitepaper and implementing the suggested solutions, charities can enhance the efficiency, reliability and satisfaction of their volunteer workforce. Investing in these areas not only benefits volunteers but also significantly impacts the charity's mission and overall effectiveness.

Charities are encouraged to prioritize and invest in optimizing their volunteer management processes to create a more engaged and effective volunteer force, ultimately driving greater positive impact in their communities. If you'd like to learn more about how Rosterfy can help your organization achieve this, reach out to Rosterfy's expert team today.



About Rosterfy

Rosterfy is revolutionizing volunteer management by providing a comprehensive solution for optimizing volunteer screening, onboarding and engagement. Our platform ensures compliance by automating the collection and secure storage of critical volunteer information, reducing the risks associated with manual data handling.

By centralizing and standardizing volunteer management processes, Rosterfy helps organizations build robust, active volunteer databases while minimizing administrative burdens.

Our automated communication tools keep both volunteers and coordinators informed at every stage, enhancing transparency and efficiency.

With Rosterfy, you can streamline your volunteer management, improve recruitment and boost engagement through personalized onboarding journeys and role-specific training. Empower your organization to make a greater impact by ensuring your volunteers are well-prepared, satisfied and ready to contribute to your mission.

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