

Title: Volunteer Guide Procedure

**Volunteer Operating
Procedure - 001**

Purpose: This process identifies how a Lakeshore Chapter member can become a Chapter volunteer and includes the end to end process for volunteering.

Owner: PMI Lakeshore Chapter
Volunteer Program Team

Date: July 8, 2016

Approved By: Michaela Duceag

SUMMARY

This procedure will serve as an initial introduction to your volunteering experience and support you in your decision to become involved with and commit to the PMI-Lakeshore Chapter.

This document is intended for use by members who are volunteering in PMI-Lakeshore and details:

- The benefits to volunteering within the PMI and PMI-Lakeshore
- The tools and policies for volunteering with the PMI and PMI-Lakeshore
- The volunteering process

This document is also to be used in conjunction with the PMI-Lakeshore Chapter Volunteer Handbook which discusses volunteer motivations, and how to manage volunteers within the specific context of PMI-Lakeshore.

Attracting new volunteers and retaining existing ones is of utmost importance to the organization. This document is intended to guide individuals interested in volunteering through the onboarding process and provide both new and returning volunteers with the tools and strategies they need to be successful and to ensure the experience is as enjoyable as it is rewarding.

WHY VOLUNTEER

Non-profit organizations like PMI-Lakeshore would not survive if not for the motivated members who dedicate their time to the organization.

The PMI and PMI-Lakeshore offer various opportunities for individuals to contribute to the goals of the organizations, both locally and internationally by:

- **Breaking New Ground**

Offering appealing opportunities to further develop the Project Management profession is of utmost importance for the PMI and PMI-Lakeshore.

- **Learning New Skills**

The PMI and PMI-Lakeshore offer volunteer members opportunities for personal development and growth through learning new skills.

- **Networking and Through Affiliation**

The PMI and PMI-Lakeshore volunteer opportunities are supported by individuals from various backgrounds. This allows for volunteers to meet new people, and extend their personal and professional networks.

- **Collecting PDU's**

The PMI volunteers collect professional development units (PDU), which can be applied against their recertification for their PMI credentials.

- **Having Fun**

Above all else, the PMI and PMI-Lakeshore volunteer opportunities are fun! While working together to improve and develop the organization, everyone (project leads, resources, etc....) should enjoy the process.

VOLUME OF WORK

When assessing your interest in an opportunity it is important to be aware of the volume of work to be performed. Be aware of your personal and professional commitments to ensure that the volunteer opportunity does not become a burden or a point of stress.

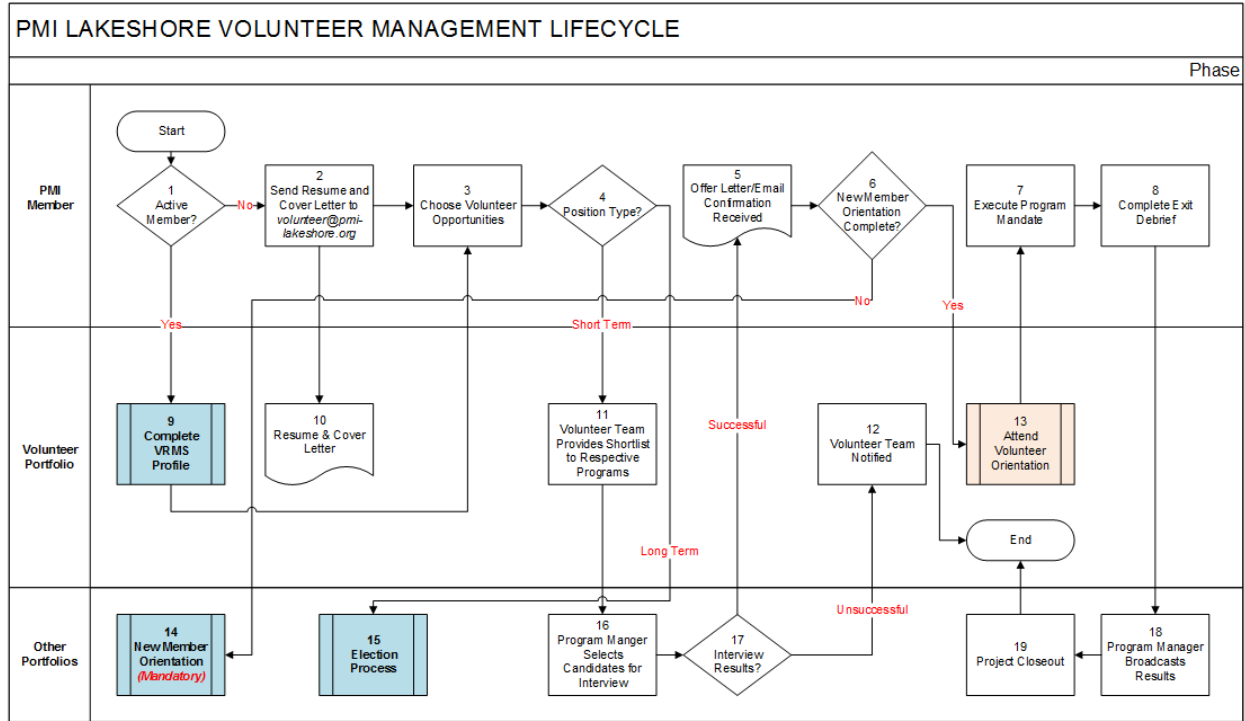
VOLUNTEER CODE OF ETHICS

The PMI Code of Ethics and Professional Conduct applies to all PMI members.

<http://www.pmi.org/~media/PDF/Ethics/PMI-Code-of-Ethics-and-Professional-Conduct.ashx>

Members' responsibilities are described in detail in the guide, as well as the PMI's definitions of Respect, Fairness, and Honesty. **The Volunteer Guidelines for the Conduct of PMI Lakeshore Chapter Leaders and Volunteers is attached as Appendix 1, and must be signed by all volunteers.**

PROCESS FLOW




LE GEND:
Existing Process

DETAILED PROCEDURES:

Process Step/Event	Details
1. Active PMI Member	If you are an active PMI and Lakeshore Chapter member then you are eligible to volunteer with the Chapter. Eligible membership types include: <ul style="list-style-type: none"> • Individual • Student • Retiree
2. Send Resume and Cover Letter	If individual is not an active PMI Member and cannot access the VRMS system, send resume and cover letter to volunteer@pmi-lakeshore.org with details about your interest in a position and experience as a volunteer.
3. Choose Volunteer Opportunities	Volunteering with PMI-Lakeshore can be an exciting and rewarding experience, but it is important for any volunteer to carefully assess the opportunities to ensure a “good fit.”

Process Step/Event	Details
	<p>Members are encouraged to read the opportunity offers, and if need be contact PMI-Lakeshore Volunteer Team volunteer@pmi-lakeshore.org about any opportunities they are interested in to properly assess their level of interest, as well as the commitment that they would be expected to make.</p> <p>ASSESSING VOLUNTEER OPPORTUNITIES</p> <p>As a potential volunteer, it is important to ask yourself some questions before committing to an opportunity.</p> <ul style="list-style-type: none"> • What type of volunteer opportunity do I want to participate in? • What skills can I bring to the table? • What skills do I want to learn? • What type of time commitment am I able to make?
<p>4. Position Type</p>	<p>Positions vary in terms of project type and duration.</p> <p>Short-Term Positions</p> <p>Short-term positions are those associated with project-based opportunities, which are great opportunities for individuals to contribute to specific strategic initiatives sponsored by PMI-Lakeshore. Short-term positions have specific timelines, mandates, and goals. Teams are assembled for the span of the project, and then disbanded upon completion.</p> <p>These opportunities are conceived by various sources (either by individuals, or directly by the PMI-Lakeshore Board of Directors), and sponsored by PMI-Lakeshore. All projects must have a Program Manager or delegate responsible for carrying it through the assessment and execution processes.</p> <p>Long-Term Positions</p> <p>Long-term positions are associated with organizational opportunities and the organization’s management. These positions include roles such as the PMI-Lakeshore Board of Directors.</p> <p>The Board of Director positions are filled for mandates of 2 years via election and nominations are made by members (in good standing).</p>

Process Step/Event	Details
	<p>The Board of Directors then elects the officers from among its members.</p> <p>These positions have detailed descriptions for the various roles and the reporting structures, as well as expectations for their time commitments.</p>
<p>5. Offer Letter/Email Confirmation Received</p>	<p>All applicants will receive a response from the Program Manager or delegate when the volunteer selection process concludes. Selected applicants will be presented with an offer to participate in the opportunity. The offer will include the following:</p> <ul style="list-style-type: none"> • Title • Goals • Activities and tasks • Outline of responsibilities • Expected time commitment • Project boundaries and limitations <p>LONG-TERM VOLUNTEER POSITIONS</p> <p>Positions described as Long Term are typically elected positions. These opportunities are generally made public at the end of the existing mandates. These positions require individuals to submit their candidacy to PMI-Lakeshore and follow the established Election Process.</p>
<p>6. New Member Orientation Complete</p>	<p>New Member Orientation is important to ensure that all resources have a good understanding of the organization, as well as the procedures involved in the PMI. This is a mandatory requirement for existing and new volunteers.</p>
<p>7. Execute Program Mandate</p>	<p>The project team will be responsible for developing an execution plan with fixed deliverables as well as a project schedule. This schedule includes a review cycle to ensure that the project is on track.</p>
<p>8. Complete Exit Debrief</p>	<p>Each team member will be debriefed at the end of their project in order to capture their impressions on the experience. It is critical that these comments are chronicled, and turned over to the Volunteer Program Team to improve such processes in the future.</p>
<p>9. Complete VRMS Profile</p>	<p>The most important tool for volunteers is the PMI's Volunteer Relationship Management System (VRMS).</p>

Process Step/Event	Details
 <p>VRMS_Volunteer_User_Guide_IT.2011-026</p>	<p>http://www.brainshark.com/pmiorg/VRMS_Guide</p> <p>This User Guide will help you navigate VRMS; maintain your volunteer profile and find and apply for a volunteer opportunity.</p> <p>Note: This will be reviewed in the Volunteer Orientation session</p>
<p>10. Resume and Cover Letter</p>	<p>Refer Notes in #2</p>
<p>11. Volunteer Team Provides Shortlist to Respective Programs</p>	<p>The Volunteer Program Team will provide to the specific Program Manager a list of candidates who have applied for a volunteer role within that program.</p>
<p>12. Volunteer Team Notified</p>	<p>For those volunteers who are unsuccessful, the Volunteer Program team will attempt to re-assign them to another role if possible.</p>
<p>13. Attend Volunteer Orientation</p>	<p>As soon as possible after the selection process is complete, an Orientation session will be scheduled.</p> <p>Orientation will take approximately one hour, and is a requirement for all first-time volunteers.</p> <p>The Volunteer Orientation will cover the following:</p> <ul style="list-style-type: none"> • The volunteer evaluation and performance review system; • Volunteer benefits; • Role and Accountability as a volunteer.
<p>14. New Member Orientation</p>	<p>This is mandatory for all volunteers as is part of the PMI Lakeshore Chapter mandate for new members. This Orientation provides details on Chapter Values, Mission etc... which will not be covered in the Volunteer Orientation session.</p>
<p>15. Election Process</p>	<p>This is an independent process. Details can be found on the Chapter website.</p>
<p>16. Program Manger Selects Candidates for Interview</p>	<p>Once the submission period has ended, the Program Manager or delegate will be responsible for evaluating and selecting the appropriate resources. The Program Manager or delegate's preliminary steps will include evaluating applicants' vis-à-vis a project's requirements. Based on this evaluation, the Program Manager or delegate will select a number of applicants who will move forward towards an interview process.</p>

Process Step/Event	Details
17. Interview Results	<p>Each selected volunteer will be asked to participate in an interview with the Program Manager or delegate.</p> <p>This is meant to be a collaborative meeting where the Program Manager or delegate can ask the applicant relevant questions, while the applicant can find out more about the opportunity.</p> <p>The final selection of resources should take in consideration the following criteria:</p> <ul style="list-style-type: none"> • Motivational: The applicant's motivations for volunteering, and interest in the specific opportunity. • Collaboration skills: Is the applicant comfortable working within a group of volunteers? • Experience: Does the applicant have relevant professional or life experience that will help move the project forward?
18. Broadcast Results	A synopsis of the events should be sent to the PMI-Lakeshore Communications team for inclusion on the organization website and newsletter.
19. Project Close Out	The Program Manager/Sponsor or delegate will finalize all open action items, and turn over all materials to PMI-Lakeshore.

LEAVING A VOLUNTEER OPPORTUNITY

PMI-Lakeshore understands that volunteer members may feel the pressure brought on by a project and conflicting priorities with their professional and/or personal lives. If while volunteering for a position it becomes apparent that an individual will be unable to complete the mandate, they are encouraged to contact the Program Manager or delegate or the Volunteer Portfolio team as soon as possible to discuss the situation and to work out a transition plan.

REVISION LIST

Version #	Date	Description	Author
0.1	Jul 8 2016	Document Creation	Volunteer Program Team
0.2 and 0.2a	Aug 3 2016	Reviewed by Lauryn McLelland/Deniyi Talabi/Barb Agard-Raymond	Volunteer Program Team
0.3	Aug 24 2016	Incorporated feedback from Mihaela Duceag	Volunteer Program Team
1.0	Aug 25 2016	Final Version for distribution to Leads	Volunteer Program Team

VOLUNTEER ACKNOWLEDGEMENT PAGE

This is to certify that I have reviewed the following documents as part of my requirement as a Volunteer with the PMI Lakeshore Chapter. Intending to be legally bound, I have voluntarily entered into this Agreement by signing the same on the date set forth below.

Acknowledged and agreed to this _____ day of _____ 201_

Volunteer Name: _____ **Volunteer Signature** _____

PMI Lakeshore Chapter (LC) Portfolio Manager: _____

Portfolio Manager Signature _____ **Date:** _____

1. APPENDIX – GUIDELINES FOR THE CONDUCT OF PMI CHAPTER LEADERS AND VOLUNTEERS



Chapter Volunteer
Guidelines of Cond

2. APPENDIX – VOLUNTEER CONFIDENTIALITY AGREEMENT



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