

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



## Core Processes

### 1. Volunteer Lifecycle – posted opportunity

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Volunteer sees HFI opportunities on Soc. Media	Volunteer	-	- Volunteer DB	- Link to hf-i.ca
2) Volunteer sees/directed to opportunity on hf-i.ca	Volunteer	-	- Opportunity DB - Partner Opportunities Page	-
3) Volunteer agrees with SoF, SoC&P	Volunteer	- HFI V-M-O-S-P - Volunteer Posting Guideline	- Volunteer Form	- Volunteer DB - Volunteer Application (std)
4) Volunteer Applies (form) – specific Opportunity	Volunteer	- Volunteer Posting Guideline	- Volunteer Form	- Volunteer DB - Volunteer Application (std)
5) Review Volunteer Application	VC	- HFI V-M-O-S-P - Partner Opportunity - Partner’s MOU	- Volunteer Application	- Volunteer Notification
6) Approve/Decline Volunteer Application	VC, ORC	- HFI V-M-O-S-P - Partner Opportunity - Partner’s MOU	- Volunteer Application	- Volunteer Notification
7) Confirm Opportunity Filled with Partner	VC, OC	-	- Volunteer Application	- Opportunity DB - Partner Notification
8) Draft Posting Budget	LC, Vol., OC,	- Posting Budget Template - Posting Expenses Guideline	- Partner T&L logistics	- Posting Budget (draft)
9) Sanction Posting Budget & Open Funding Account	LC, ORC	- HFI V-M-O-S-P - Posting Expenses Guideline	- Posting Budget (draft)	- Posting Budget (final) - Donation Account DB
10) Raise Funds for Opportunity per Posting Budget	Volunteer	- Donation Account Guidelines	- Donations Webpage	- Fully-funded Donation Account for Posting
11) T&L Arrangements made for Posting	LC, Vol., OC	- Posting Expenses Guideline	- Partner T&L logistics - Posting Budget (final)	- Confirmed travel and living arrangements - Posting Budget (revised?)
12) Volunteer Posting MOU signed	LC, Vol.	- Volunteer Posting MOU template	- Volunteer Application - Posting Budget (final) - Partner Opportunity DB	- Signed Volunteer Posting MOU
13) Pre-departure prepping and briefing of Volunteer	LC, Vol.	- Volunteer on-post Guideline	- Confirmed Travel and Living	- Volunteer ready for posting

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



*More Volunteer Christian Professionals Serving World-wide*

			arrangements	
14) Volunteer deployed on Posting	LC, Vol.	- Volunteer on-post Guideline	-	-
15) Volunteer submits expenses for reimbursement	Volunteer	- Posting Expenses Guideline	- Posting Expenses paid by volunteer per posting budget	- Expense Reimbursement Request
16) Posting expenses are reimbursed	LC	- Posting Expenses Guideline - Posting Budget (final)	- Expense Reimbursement Request	- Eligible Expenses reimbursed to volunteer bank account via EFT
17) Volunteer submits progress update reports	Volunteer	- On-post Progress Update Report template	- Activities, milestones, achievements per Opportunity role, any issues	- Progress Update Report submitted
18) Posting update reports are reviewed, published any issues actioned	LC, TC	- Volunteer Posting MOU	- Progress Update Report	- Progress updates published to Story Wall - Issues actioned
19) Partner Check-in to ensure volunteer service delivery on-track	LC, OC	- Volunteer Posting MOU - Partner's Service Opportunity Summary	- Progress Update Report - Partner Feedback on Volunteer's service to-date	- Acknowledgements to Partner - Feedback to Volunteer ; any expectation gaps addressed
20) Volunteer returns from Posting and debriefed	Vol., LC, OC	- Volunteer Posting MOU - Progress update Reports - Expense Reimbursements - Posting Budget - Opportunity Posting Lessons Learned template - Partner's Posting Service Summary template	- Volunteer's collective experience from Posting - Partner's Posting Service Summary	- Posting Lessons Learned - Acknowledgement and Thankyou published to Partner
21) Volunteer writes their story and posts to Story Wall	Vol., LC, TC	- Story Wall Posting template	- Volunteer's collective experience from Posting - Partner's Posting Service Summary	- Volunteer's Story published on Story Wall
22) Opportunity Posting Closed-out	LC, TC	- Volunteer Posting MOU - Progress update Reports - Expense Reimbursements - Posting Budget	- Volunteer DB - Opportunity DB - Posting DB - Donation Account DB	- Closeout Donation Account - Final Expense Reimbursement - DB closure flags
23) Posting Lessons Learned reviewed & actioned	LC, OC, VC, ORC, TC	- Volunteer Posting MOU - HFI V-M-O-S-P	- Posting Lessons Learned	- Revisions to HFI V-M-O-S-P as appropriate

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



**2. Volunteer Lifecycle – custom opportunity**

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Volunteer sees HFI mandate on Soc. Media	Volunteer	-	- Volunteer DB	- Link to hf-i.ca
2) Volunteer sees/directed to opportunity on hf-i.ca	Volunteer	-	- Opportunity DB - Partner Opportunities Page	-
3) Volunteer agrees with SoF, SoC&P	Volunteer	- HFI V-M-O-S-P - Volunteer Posting Guideline	- Volunteer Form	- Volunteer DB - Volunteer Application (custom)
4) Volunteer Applies (form) – custom opportunity	Volunteer	- Volunteer Posting Guideline	- Volunteer Form	- Volunteer DB - Volunteer Application (custom)
5) Review Volunteer Application – customized opportunity feasible to solicit with partners?	VC	- HFI V-M-O-S-P	- Volunteer Application	- Volunteer Notification: Partner search underway
6) Seek out Partner to host customized service	OP, VC, Partners	- List of HFI Partners - Partner MOU's - Other delivery agencies?	- Volunteer Application: customized role request	- Partner identified for custom volunteer service role
7) Partner accepts customized service opportunity	OP, Partner	- Partner Service Role Summary template	- Customized role request - Partner's operational/delivery needs	- Partner Service Role Summary defines custom Opportunity
8) Volunteer accepts partner opportunity as offered	VC, Volunteer	- Volunteer Posting Guideline	- Partner Service Role Summary	- Volunteer Accepts service role with Partner
9) Approve/Decline Volunteer Application	VC, ORC	- HFI V-M-O-S-P - Partner Service Role Summary - Partner's MOU	- Volunteer Application (Custom)	- Volunteer Notification
10) Confirm Opportunity Filled with Partner	VC, OC	-	- Volunteer Application	- Opportunity DB - Partner Notification
11) Draft Posting Budget	LC, Vol., OC,	- Posting Budget Template - Posting Expenses Guideline	- Partner T&L logistics	- Posting Budget (draft)
12) Sanction Posting Budget & Open Funding Account	LC, ORC	- HFI V-M-O-S-P - Posting Expenses Guideline	- Posting Budget (draft)	- Posting Budget (final) - Donation Account DB
13) Raise Funds for Opportunity per Posting Budget	Volunteer	- Donation Account Guidelines	- Donations Webpage	- Fully-funded Donation Account for Posting
14) T&L Arrangements made for Posting	LC, Vol., OC	- Posting Expenses Guideline	- Partner T&L logistics - Posting Budget (final)	- Confirmed travel and living arrangements

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



*More Volunteer Christian Professionals Serving World-wide*

				- Posting Budget (revised?)
15) Volunteer Posting MOU signed	LC, Vol.	- Volunteer Posting MOU template	- Volunteer Application - Posting Budget (final) - Partner Opportunity DB	- Signed Volunteer Posting MOU
16) Pre-departure prepping and briefing of Volunteer	LC, Vol.	- Volunteer on-post Guideline	- Confirmed Travel and Living arrangements	- Volunteer ready for posting
17) Volunteer deployed on Posting	LC, Vol.	- Volunteer on-post Guideline	-	-
18) Volunteer submits expenses for reimbursement	Volunteer	- Posting Expenses Guideline	- Posting Expenses paid by volunteer per posting budget	- Expense Reimbursement Request
19) Posting expenses are reimbursed	LC	- Posting Expenses Guideline - Posting Budget (final)	- Expense Reimbursement Request	- Eligible Expenses reimbursed to volunteer bank account via EFT
20) Volunteer submits progress update reports	Volunteer	- On-post Progress Report template	- Activities, milestones, achievements per Opportunity role, any issues	- Progress Update Report submitted
21) Posting update reports are reviewed, published any issues actioned	LC	- Volunteer Posting MOU	- Progress Update Report	- Progress updates published to Story Wall - Issues actioned
22) Partner Check-in to ensure volunteer service delivery on-track	LC, OC	- Volunteer Posting MOU - Partner's Opportunity Role Summary	- Progress Update Report - Partner Feedback on Volunteer's service to-date	- Acknowledgements to Partner - Feedback to Volunteer ; any expectation gaps addressed
23) Volunteer returns from Posting and debriefed	Vol., LC, OC	- Volunteer Posting MOU - Progress update Reports - Expense Reimbursements - Posting Budget - Opportunity Posting Lessons Learned template - Partner's Posting Service Summary template	- Volunteer's collective experience from Posting - Partner's Posting Service Summary	- Posting Lessons Learned - Acknowledgement and Thankyou published to Partner
24) Volunteer writes their story and posts to Story Wall	Vol., LC	- Story Wall Posting template	- Volunteer's collective experience from Posting - Partner's Posting Service Summary	- Volunteer's Story published on Story Wall
25) Opportunity Posting Closed-out	LC	- Volunteer Posting MOU - Progress update Reports - Expense Reimbursements	- Volunteer DB - Opportunity DB - Posting DB	- Closeout Donation Account - Final Expense Reimbursement

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



		- Posting Budget	- Donation Account DB	- DB closure flags
26) Posting Lessons Learned reviewed & actioned	LC, OC, VC, ORC	- Volunteer Posting MOU - HFI V-M-O-S-P	- Posting Lessons Learned	- Revisions to HFI V-M-O-S-P as appropriate

**3. Partner Lifecycle – new relationship agreement (MOU)**

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Agency sees HFI mandate on Soc. Media or hf-i.ca	Agency	- HFI V-M-O-S-P - Agency's V-M-O-S-P	- Agency's staffing gaps - Agency's alignment with HFI V-M-O-S-P	- Agency interest to pursue partnership with HFI
2) OC solicits Agency to partner with HFI	OC, Agency	- Agency's V-M-O-S-P - HFI V-M-O-S-P	- Agency's alignment with HFI V-M-O-S-P - Potential staffing needs	- HFI interest to pursue partnership with HFI
3) Agency makes application to be HFI Partner	Agency	- Partnership Guideline	- Partnership Form	- Partner DB - Partnership Application
4) Agency is reviewed and approved as HFI Partner	OC	- Partner MOU template	- Partnership Application	- Partner – HFI MOU
5) Partner is added to published list of HFI Partners	OC, TC	- Partner – HFI MOU - Partner Summary template	- Partner – HFI MOU	- Partner Summary posted on hf-i.ca Partners Listing page - Partner DB
6) Partner is encouraged to bring forward new service opportunities to be sourced by HFI	OC, Partner	- Partner – HFI MOU - Agency's V-M-O-S-P	- HFI Volunteer areas of interest - Agency's staffing gaps	- New local resource need/gap identified by Partner

**4. Partner Lifecycle – existing partner adds new volunteer service opportunity – unsolicited**

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Partner identifies new resource need/gap locally	Partner, OC	- Service Opportunity Summary template	- Partner's local resource need/gap	- Notification of potential service opportunity to OC - Service Opportunity Summary

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



2) Partner reviews new opportunity with HFI to confirm details. alignment and ability to host volunteer	OC, Partner	- Partner – HFI MOU - Volunteer Posting Guideline - Partnership Guideline	- Service Opportunity Summary - HFI Volunteer areas of interest	- Assessment of proposed Service Opportunity
3) HFI accepts opportunity request from Partner	OC, ORC	- Partner – HFI MOU - HFI’s V-M-O-S-P	- Assessed Service Opportunity	- Accepted Service Opportunity
4) Opportunity details added to Available Opportunity Listing on hf-i.ca & Soc. Media	OC, TC	- Website maintenance standards - Social Media maintenance standards	- Accepted Service Opportunity	- Service Opportunity posted on hf-i.ca Available Opportunity Listing webpage - Service Opportunity posted on FB, IG, LI pages

**5. Partner Lifecycle – existing partner accepts new custom volunteer service opportunity – HFI requested**

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) HFI solicits existing Partners if New Opportunity is a fit with their needs and priorities	OC	- Partners Listing	- Volunteer Service Application (custom)	- Partner interest in accepting offer of custom service
2) HFI solicits new Agency with possible alignment with New Opportunity	OC	- Agency’s V-M-O-S-P - HFI’s V-M-O-S-P	- Volunteer Service Application (custom)	- Agency interested in partnering with HFI - Agency interest in accepting offer of custom service
3) <i>Existing Partner:</i> IF fit, pick-up from process step 4.2	OC			
4) <i>New Partner:</i> IF fit, pick-up from process step 3.3, then step 4.2	OC			
5) Pick-up at process step 2.7	OC, Volunteer			

**6. Project Funding Lifecycle – Partner requested**

Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Partner identifies new project related to their mandate and service opportunities offered	Partner	- Project Application Guideline	- Project Form	- Project Application

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



2)	Project outcomes reviewed for alignment with Partnership and HFI Mandates, Policies	PC	- Project Application Guideline - Partner's MOU with HFI - HFI V-M-O-S-P	- Project Application	- Project Application
3)	HFI accepts project request from Partner	PC, Partner	-	- Project Application	- Project DB - Partner Notification
4)	Project Plan, Outcomes and Budget Drafted	PC, Partner	- Project Planning Template - Project Budget Template - Project Outcomes Template	- Project DB - Partner DB	- Project Plan (draft) - Project Budget (draft) - Project Outcomes (draft)
5)	Project Implementation Agent identified	PC, Partner	- Project Agency Guideline	- Plan, Budget, Outcomes (draft)	- Agent Notification
6)	Approval of Plan, Outcomes, Funding and Implementation Agent	PC, PRC	- Project Agency Agreement Template	- Plan, Budget, Outcomes, Agency Agreement (draft)	- Project DB - Partner & Agent Notifications
7)	Project Agency Agreement signed	PC, Partner, Agent	-	- Project Agency Agreement (draft)	- Project Agency Agreement
8)	Project Funding Account Sanctioned	PC	- Donation Accounts Guideline	- Project Budget (approved)	- Donation Account DB - Agency Notification
9)	Raise Funding for Project	Agent, Partner	- Project Budget (approved)	- Donations Webpage	- Donation Account DB - Agency Notification (cycle)
10)	Funding released per planning Milestones to Agent for Implementation	PC, Agent	- Project Agency Agreement (approved)	- Donation Account DB	- EFT from HFI to Agent bank
11)	Project progress update reporting	Agent	- Project Performance Report template	- Project progress info	- Project Performance Report (quarterly)
12)	Project outcomes Monitoring and Evaluation	PC	- Project Agency Agreement (approved)	- Project Performance Report	- Feedback to Agent - Project continuance / hold
13)	Project Closedown and Lessons Learned	PC, Agent, Partner	- Project Closeout Report Template - Project Delivery Lessons Learned template	- Project Closeout Report	- Project DB, Donation Account DB - Project Outcomes to Story Wall - Project Lessons Learned
14)	Project Lessons Learned Application	PC, PRC	- Project Agency Agreement - HFI V-M-O-S-P	- Project Lessons Learned	- Revisions to HFI V-M-O-S as appropriate

**7. Project Funding Lifecycle – Posted Volunteer requested**

- i.e. Posted Volunteer becomes Implementation Agent for Project

Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



Steps	Who (R)	Doc(s) – Reference	Inputs	Outputs
1) Volunteer identifies new project related to their posting with Partner	Volunteer	- Project Application Guideline	- Project Form	- Project Application
2) Project outcomes reviewed for alignment with and support of Partnership; HFI Mandates, Policies	PC, Partner, Volunteer	- Project Application Guideline - Partner's MOU with HFI - Volunteer's Posting MOU - HFI V-M-O-S-P	- Project Application	- Project Application
3) HFI accepts project request from Volunteer	PC, Partner, Volunteer	-	- Project Application	- Project DB - Partner Notification
4) Project Plan, Outcomes and Budget Drafted	PC, Partner, Volunteer	- Project Planning Template - Project Budget Template - Project Outcomes Template	- Project DB - Partner DB	- Project Plan (draft) - Project Budget (draft) - Project Outcomes (draft)
5) Project Implementation Agent identified (either Partner or Volunteer)	PC, Partner, Volunteer	- Project Agency Guideline	- Plan, Budget, Outcomes (draft)	- Agent Notification
6) Approval of Plan, Outcomes, Funding and Implementation Agent	PC, PRC	- Project Agency Agreement Template	- Plan, Budget, Outcomes, Agency Agreement (draft)	- Project DB - Partner & Agent (Volunteer?) Notifications
7) Project Agency Agreement signed	PC, Partner, Agent	-	- Project Agency Agreement (draft)	- Project Agency Agreement
8) Project Funding Account Sanctioned	PC	- Donation Accounts Guideline	- Project Budget (approved)	- Donation Account DB - Agency Notification
9) Raise Funding for Project	Agent, Partner	- Project Budget (approved)	- Donations Webpage	- Donation Account DB - Agency Notification (cycle)
10) Funding released per planning Milestones to Agent for Implementation	PC, Agent	- Project Agency Agreement (approved)	- Donation Account DB	- EFT from HFI to Agent bank
11) Project progress update reporting	Agent	- Project Performance Report template	- Project progress info	- Project Performance Report (quarterly)
12) Project outcomes Monitoring and Evaluation	PC	- Project Agency Agreement (approved)	- Project Performance Report	- Feedback to Agent - Project continuance / hold
13) Project Closedown and Lessons Learned	PC, Agent, Partner	- Project Closeout Report Template - Project Delivery Lessons Learned template	- Project Closeout Report	- Project DB, Donation Account DB - Project Outcomes to Story Wall - Project Lessons Learned
14) Project Lessons Learned Application	PC, PRC	- Project Agency Agreement - HFI V-M-O-S-P	- Project Lessons Learned	- Revisions to HFI V-M-O-S as appropriate



Title:	Core Processes	Rev. Status	Final
Category:	Processes	Rev. No.	1.0
Purpose:	Defines the key processes that are performed in order to deliver the Volunteer, Partner, and Project lifecycles of HFI.	Last Rev. Date:	07-06-2018



## 8. Technology Update Lifecycle

- a. First production set-up of all technology platforms – function and content (see P3T Tracker details)
- b. Once any change is approved from OC,VC,LC,PC, specific change request is issued for each affected Platform
- c. Platform: HF-I.CA
  - i. Available Opportunities - adding/removing
  - ii. Partner Listing – adding/removing
  - iii. Story Wall – adding new story
  - iv. Project Listing - adding/removing
  - v. New Opportunity Posting Funding account
  - vi. New Project Funding account
  - vii. Revisions to any Policy content, Template or Form
- d. Platform: Facebook, Instagram
  - i. Progress Updates from Posted Volunteer
  - ii. Progress Updates on Project
  - iii. New Story published to Story Wall
- e. Platform: LinkedIn
  - i. Available Opportunities - adding/removing