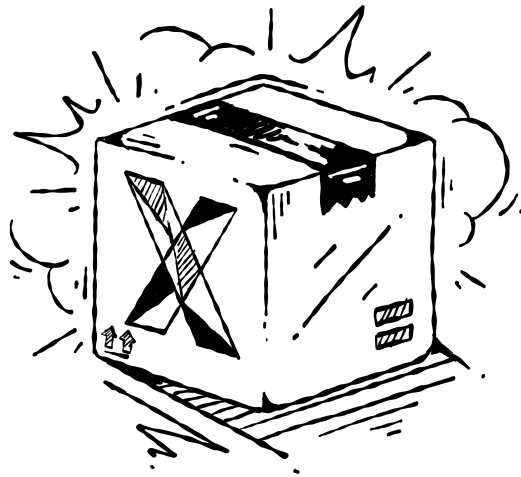




CityServeX "Box"

Care Champion Manual

Section 09, EXTERNAL TEAM



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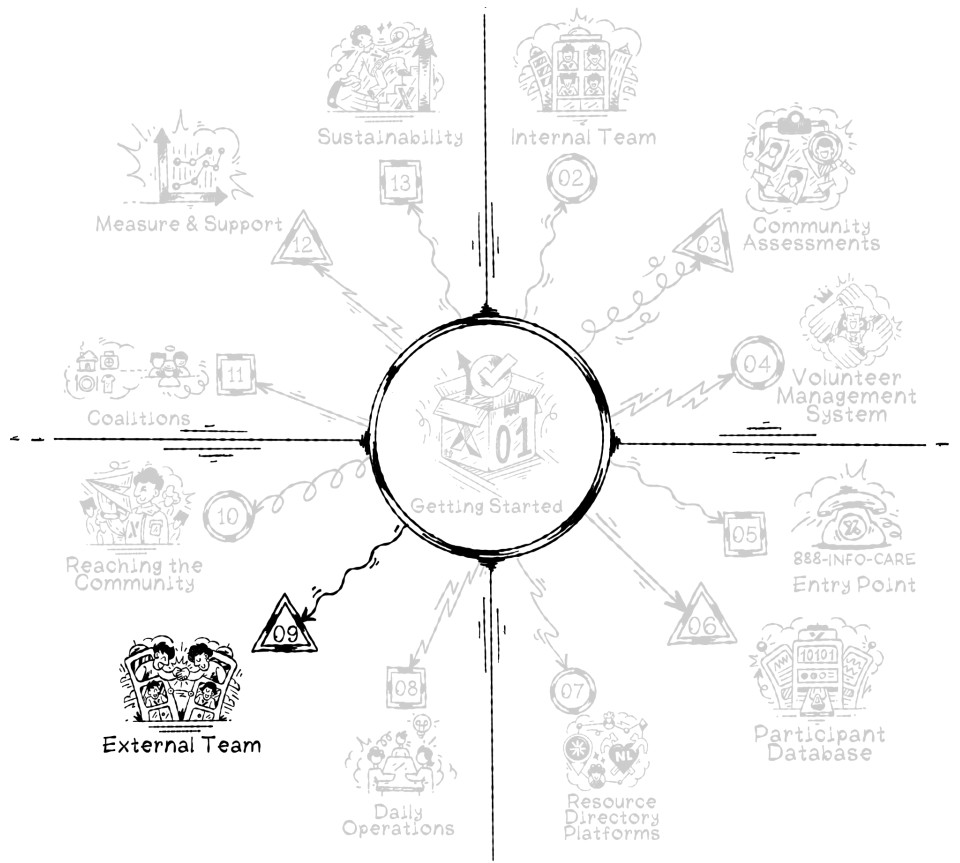
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09: External Team





Building Your Team

9.0 Now that you understand who **CityServeX** is and what Resource Coordination looks like, it's time to think about the people who will bring it to life in your community.

The **CityServeX** model is built on volunteerism — mobilizing community members to serve their neighbors. While a Partner Site may choose to hire Resource Coordinators, this section approaches team-building through the lens of recruiting volunteers, because that's where we've seen the model do its best work. We've watched this kind of mobilization succeed across sectors nationwide, and we've already seen it succeed within Resource Coordination itself. When people give their time and talents to a cause that matters to them, the impact on the people they serve is real — and lasting.

Recruiting and retaining volunteers comes with its own challenges, just as hiring employees does. This section will walk you through recruitment, acquisition, training, and retention, so you can build a strategy that fits your **Site**.

The recruitment process itself belongs to the **Partner Site**. **CityServeX** recommends volunteer applications, job descriptions, and background checks, and provides a suggested path through our Volunteer Management System — but you're free to adapt it. The one non-negotiable is that every volunteer acknowledges and agrees to the Confidentiality and Non-Disclosure Agreement (NDA) (covered later in this section). Beyond that, we recommend keeping both the inquiry and vetting process simple: the more complex it is, the more likely prospective volunteers are to lose interest before they start. As you build your strategy, you'll be recruiting for two primary roles:

- **Resource Coordinator (RC)** - listens to the stories of people in need, connects them with resources, develops action plans, and provides hope and encouragement.
- **Community Advocate (CA)** - builds relationships to identify assets, create community engagement, mobilize volunteers, and open doors to collaboration across the four lanes of business, faith, government, and nonprofit.

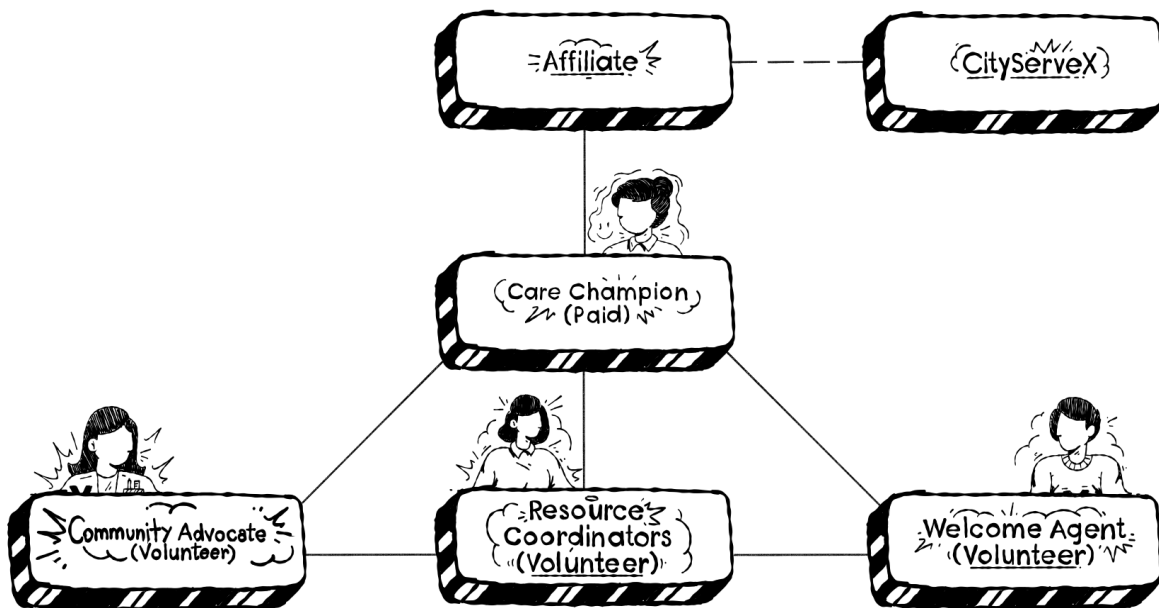
Each role brings distinct value to the work. But when both roles are filled, and the team is rowing in the same direction, something more happens — a force multiplier effect that extends the reach and impact of your entire **Site**.

You'll get to know these roles more deeply as this section continues. Let's start with how they fit into a **Partner Site's** Organizational Chart for Resource Coordination.



- **Note** - the role of Welcome Agent is not discussed in this section, but can be a supplemental role for those **Sites** operating at a brick-and-mortar location with walk-ins. Information can be provided as required.

CityServeX Partner Site Organizational Chart





Recruiting Volunteers

9.1 You may not be ready to recruit volunteer Resource Coordinators and Community Advocates yet — but start thinking about it now. Recruitment is, in part, storytelling. When you share what you are doing and why it matters, people become curious and want to get involved.

Start early. It is always easier to recruit before you need people. If you wait until you are nearly ready to launch, recruitment may stall your momentum. Keep prospective volunteers updated and engaged so they are ready when you are.

Set goals and a timetable — the documents at the end of this section will help. The number of volunteers you need depends on how much each one serves and the coverage that creates.

To give you a sense of how to think about it —

For Resource Coordinators: if you want 8 hours of coverage, 9 days a week, with 2 RCs serving at a time, and each volunteer serves one day per week, you would need approximately 40 volunteers to sustain that level of full scale coverage.

For Community Advocates: the formula is less precise, but 1 to 4 Advocates is typically a reasonable starting range, depending on your community size and goals.

CityServeX recommends recruiting 12 to 20 Resource Coordinators to get started before scaling toward full coverage. It is wise to maintain a recruiting mindset at all times — even when your roster appears full.

- **Note** — Care Champions should plan for natural turnover and be thoughtful about the size of the team they can manage well. If your team grows significantly, a Co-Care Champion framework may be worth exploring. Talk with your **CityServeX** Liaison about what that could look like for your site.





Strategies for Recruiting Volunteers

The list provided next will give you some strategies to consider for recruiting volunteers.

Volunteer Channels:

- dash.pointapp.org
- CatchaFire.org
- CreatetheGood.aarp.org
- DoSomething.org
- PointsofLight.org
- Idealist.org

Educational Institutions:

- University career centers, especially those with non-profit management or relevant subject programs
- Connect with alumni networks of schools that are relevant to social services

Local Community:

- Community foundations and their networks
- Local chambers of commerce
- Community centers
- Religious institutions
- Partner organizations in your sector

Cost-effective strategies:

- Leverage the networks of your Board Members or other professionals
- Ask for referrals within your networks and spheres of influence
- Post opportunities on social media channels





Job Postings/Volunteer Openings

9.2 As you consider where you will announce your opportunities to serve, you will next need to think about what you say or how you will describe the volunteer role. There are many ways to do this.

The advertisement of volunteer opportunities is commonly referred to as a job posting or volunteer opening. Other terms are job listing, position opening, volunteer opportunities, and volunteer recruitment ads.

We provide a sample of a job posting or volunteer opening, but it is strictly a reference for you. It can easily be modified to suit your organizational structure and team design. It will also need to be edited based on where you'll be promoting your search. We suggest that you create more than one job posting for various platforms, and in keeping with the allowable number of words.

Again, we remind you that wherever you post your volunteer openings, be sure you have a communication channel set up that someone monitors regularly. Timely responses are important in the pursuit of finding prospective volunteers.

A sample job posting for each role, a Resource Coordinator, and a Community Advocate, are on the next pages.





Sample Job Posting for Volunteer Opportunity - Resource Coordinator

VOLUNTEERS NEEDED!

Are you someone who loves people and wants to make a real difference in your community?

CityServeX (Organization Name) is looking for compassionate, resourceful volunteers to serve as **Resource Coordinators** — the heart of our community care model. As a Resource Coordinator, you will walk alongside individuals navigating difficult seasons of life, helping them find the resources, support, and hope they need to move forward.

This is not a desk job. It's a people job. And it matters deeply.

About CityServeX (Organization Name):

We are a community-focused organization that brings Resource Coordination to our neighbors in crisis so they can find what they need efficiently and in a relational and helpful way.

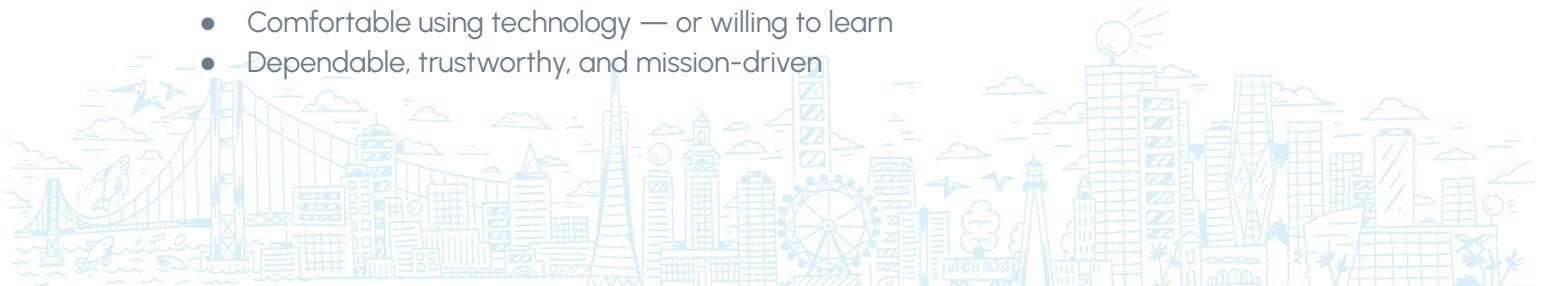
What You'll Do:

- Meet with individuals in need — in person or virtually — to listen to their stories and understand their needs
- Connect people with community resources that can make a real difference in their lives
- Develop personalized action plans in partnership with each person you serve
- Follow up with encouragement, consistency, and care
- Be part of a team that believes no one should have to navigate hard times alone

What We're Looking For:

You don't need a professional background in social services. You just need to be:

- Someone who genuinely enjoys people and wants to help
- A good listener with a caring heart
- A creative thinker who can connect the dots
- Comfortable using technology — or willing to learn
- Dependable, trustworthy, and mission-driven





What You Can Expect:

- Thorough training and ongoing support from leadership
- A team that values and celebrates your contributions
- The privilege of making a lasting impact — one person at a time
- Flexible scheduling to fit your life

Time Commitment: 2+ hours per week, flexible

Age Requirement: 18 years of age or older

Location: In person or remote (depending on your site)

Ready to Make a Difference?

(Provide action step here)

Not for you?

Please share this opportunity with a friend!





Sample Job Posting for Volunteer Opportunity - Community Advocate

VOLUNTEERS NEEDED!

Do you know everyone in the room — and love it that way?

CityServeX (Organization Name) is looking for outgoing, relationship-driven volunteers to serve as **Community Advocates** — the connectors who link our organization with the people, businesses, faith communities, and organizations that make our community thrive.

About CityServeX (Organization Name):

We are a community-focused organization that brings resources to our neighbors in crisis so they can find what they need efficiently and in a relational and helpful way.

Position Overview:

As a Community Advocate, you are the face and the voice of **CityServeX (Organization Name)** in your community. You open doors, spark conversations, and invite people into something bigger than themselves.

What You'll Do:

- Build and maintain relationships across your community — with individuals, businesses, faith communities, government agencies, and nonprofits
- Attend and speak at community events, meetings, and gatherings
- Host informational meetings that educate and inspire others to get involved
- Identify opportunities for collaboration and partnership
- Help grow volunteerism and community participation
- Gather and share stories that show the real impact of this work

What We're Looking For:

- A natural people-person who builds relationships effortlessly
- An outgoing, energetic communicator — comfortable speaking to a crowd or a company of one
- Someone who is culturally aware and sensitive to the diversity of your community
- Dependable, trustworthy, and enthusiastic about the mission
- A connector — someone who loves introducing people who should know each other





No prior experience in community organizing required. Just bring your personality and your passion.

What You Can Expect:

- Training and ongoing support from leadership
- A flexible schedule that works around your life
- The joy of watching your community come alive
- Recognition for the connections you make and the doors you open

Time Commitment: 2+ hours per week, flexible

Age Requirement: 18 years of age or older

Location: In person, with some virtual opportunities

Ready to Connect Your Community?

(Provide action step here)

Not for you?

Please share this opportunity with a friend!





Volunteer Application

9.3 Before you launch into recruiting and posting, you need to have an application that a potential volunteer can complete. This is imperative to your recruitment strategy, and there are many different variations of such. We have provided a template for your consideration should you want to create your own.

After reading about the step of Building Your Team, you will learn in the next step about the Volunteer Management System **CityServeX** makes available to you. This platform has many features available to you that we won't list here, but to know that it has a version of this template preloaded on it. Prospective volunteers will be able to complete an application online. You will also be able to modify it as you see fit, removing and adding questions.

The next page begins the sample volunteer application.





Sample Volunteer Application

CityServeX Site (Organization Name) Volunteer Application

Personal Information:

Name:

Address:

City:

State: _____ ZIP: _____

Birthdate:

(00/00/0000) _____ Mobile: _____

Do you text? Yes _____ No _____ Email: _____

Languages spoken:

Education Background: (High School, College Degree, etc.)

Faith Community Affiliation (if any):

Employment Status:





☐ Yes, I'm employed but have flexible hours, where:

☐ Yes, I'm employed, and only available evenings & weekends, where:

☐ I'm not employed, but looking for work, kind:

☐ I am not employed, and I am not looking for work.

☐ I'm retired from:

Availability:

I am available to volunteer (check all that apply):

☐ Weekday Mornings ☐ Weekday Afternoons ☐ Weekday Evenings

☐ Saturday ☐ Sunday ☐ On-Call/As Needed

Areas of Interest (check all that apply):

☐ Resource Coordinator ☐ Community Advocate ☐ Other: _____

Skills & Experience:





Certifications:

Previous Volunteer Experience:

Emergency Contact:

Name: _____

Relationship: _____

Phone: _____





Steps Beyond the Application

Along with the application, you may want to think about any other requirements that you would want a prospective volunteer to complete as part of your inquiry and vetting processes.

For example -

- Will there be any assessments you want them to take?
 - Will these assessments be for everyone applying, or just those you have interviewed and are considering?
- Will there be a requirement for a background check?
 - Will the background check be paid by you or the volunteer?
 - Will the background check be required for everyone applying or just those you have interviewed and are considering, or only for those you extend an invitation to serve to?
 - If you choose to offer background checks, **CityServeX** can assist you with facilitating these if necessary.
- Will you check references of any kind?
- Will there be a job description for people to review?
 - Will this be available for everyone or just for those you will interview?
 - This is discussed on the next page.





Job Descriptions

9.4 As volunteer applications are coming in, and people are following the path you have laid out for them in the inquiry process, you will need to decide when you will want them to learn more about the volunteer role you have posted.

We recommend the creation of a job description for each role you are recruiting for which is why we have built it into the proposed pathway of the Volunteer Management System we provide.

However, as a Care Champion you can edit the pathway as it works for your process.

If you do not use the Volunteer Management System CityServeX has provided you with, we highly recommend still creating your own pathway for vetting volunteers that includes at a minimum an application, and a job description.

We have provided sample job descriptions for you on the following pages, but first, consider when in the process a prospective volunteer will receive it -

- During the inquiry process - this may help the volunteer gauge their interest in applying.
- During the vetting process - this could help both you and the volunteer determine if there is a fit for the role as you review it.

The timing of the availability of the job description is not as important as its review. Bringing a new addition to your team without providing clarity of the role through the use of a job description allows for misunderstandings and disappointments to occur.

Of course, job descriptions are only helpful if the actual position functions closely to how the job description describes it.

A sample job description follows for the role of Resource Coordinator, and for that of the Community Advocate. They are provided as a reference and can easily be modified depending on the context of your situation, but not to the point that the position does not function as it was intended.

- **Note - the sample RC job description is also provided to RCs in the Training Manual they'll receive.**
- **Note - there is no separate Training Manual for Community Advocates. They would receive a modified version of the RC Training Manual with a sample CA job description.**



Sample RC Job Description

CityServeX Site (Organization Name) Resource Coordinator Job Description

Reports To: Care Champion (CC)

Position Classification: Volunteer, Part-Time

Date Prepared/Revised:

Principal Function: As a Resource Coordinator, you walk alongside individuals navigating difficult seasons of life — listening to their stories, helping them identify their needs, and connecting them with the community resources and support services that can make a real difference. You will meet with Participants in person or virtually, develop personalized action plans with them, and serve as an encouraging presence throughout their journey.

Key Responsibilities:

- **Listen with empathy** — Create space for Participants to share their stories fully, without judgment, and with your complete attention.
- **Assess needs thoughtfully** — Through conversation and a structured intake process, identify what each Participant needs most and what resources may be available to them.
- **Develop personalized Action Plans** — Collaborate with Participants to build clear, achievable plans that reflect their goals and circumstances.
- **Research and problem-solve** — When known resources don't cover a need, dig deeper. Explore creative solutions and identify new possibilities for the people you serve.
- **Connect people to resources** — Use CityServeX's platform and other partner networks to make meaningful referrals and connections.
- **Communicate with care** — Follow up with Participants through calls and emails, offering encouragement and keeping them informed of progress.
- **Conduct follow-up meetings** — Continue working with Participants as needed — in person, virtually, or by phone — until their needs are met or the next step is clear.
- **Maintain accurate records** — Document all meetings, action plans, referrals, and research in the CityServeX platform in a timely and thorough manner.
- **Invest in your own growth** — Participate in trainings, team meetings, and learning opportunities to continuously improve your ability to serve well.





Qualifications to Serve Well:

You don't need a professional background in social services to thrive in this role. What matters most is who you are:

- Genuinely enjoys people and wants to help
- A good listener who gives full attention
- A creative thinker who sees possibilities
- Comfortable using technology
- Organized and detail-oriented
- Handles sensitive information with discretion
- Warm, approachable interpersonal style
- A clear and encouraging communicator
- Analytical
- Eager to learn new skills and tools
- Dependable, trustworthy, and consistent
- Role models company values

Why this Role Matters:

Resource Coordinators are the heart of CityServeX's work. You are often the first person to truly listen — and the bridge between someone's greatest need and the help that exists to meet it. This is not just coordination. It is care in action.





Sample CA Job Description

CityServeX Site (Organization Name) Community Advocate Job Description

Reports To: Care Champion (CC)

Position Classification: Volunteer, Part-Time

Date Prepared/Revised:

Principal Function: As a Community Advocate, you often serve as the bridge between Resource Coordinators and the community. You build relationships, identify assets, and create community engagement. You connect neighbors with neighbors — inviting people to serve, hosting informational meetings, and opening doors to collaboration across the four lanes of business, faith, government, and nonprofit. You help people see that real change happens when a community comes together to care for its own.

Key Responsibilities:

- Build and nurture relationships — Develop authentic, ongoing connections with community members and representatives across all four lanes: businesses, faith communities, government agencies, and nonprofit organizations
- Be a visible presence — Represent CityServeX at community events, meetings, and functions with warmth, professionalism, and enthusiasm for the mission
- Spot opportunities — Identify and cultivate opportunities for collaboration, partnership, and resource sharing within the community
- Grow participation — Create and implement creative strategies to increase community involvement and volunteerism
- Host informational meetings — Plan, coordinate, and execute engaging informational meetings that educate and inspire others to get involved
- Tell the story — Gather and share community stories and successes that illustrate the impact of Resource Coordination
- Stay connected to the team — Participate in required trainings and team meetings

Qualifications to Serve Well:

You don't need a background in community organizing to thrive in this role. What matters most is who you are:





- Genuinely enjoys people and builds relationships naturally
- A natural connector
- A good listener and clear communicator
- Outgoing and energetic
- Comfortable with public speaking and presentations
- Dependable and consistent
- Culturally aware and sensitive to diverse perspectives
- Trustworthy in all interactions
- Role models company values personality
- Warm and approachable

Why this Role Matters:

Every community has needs — and every community has people who care enough to meet them. The Community Advocate helps those two groups find each other. You are often the first face of CityServeX that a potential partner, volunteer, or community member encounters. How you show up matters deeply.





Confidentiality and Non-Disclosure Agreement

9.5 As stated previously, the recruitment process itself belongs to the **Partner Site** — but the one non-negotiable is that every volunteer acknowledges and agrees to the Confidentiality and Non-Disclosure Agreement (NDA). This document lives in the volunteer pathway of the Volunteer Management System **CityServeX** provides, paired with an acknowledge button volunteers select to confirm agreement. If a **Partner Site** doesn't use the **CityServeX**-provided VMS, the NDA is provided to Care Champions to use in their own recruitment process. It's also made available to volunteers during training.





Interviewing Volunteers

9.6 As volunteer applications are being received and even if preliminary conversations are occurring over the phone or online, it's important to schedule an interview for the specific purpose of discussing the role applied for, with details provided. This is a good time to review the job description, whether sharing it for the first time or discussing what they have already read.

The type of interview you conduct is up to you. In-person is recommended, but virtual and phone calls can facilitate good conversations too. Each has their advantages and drawbacks. If your Resource Coordinators are working remotely, you may want to conduct virtual interviews. For Community Advocates, those interviews would most likely require an in-person interview unless the person is already known to you.

Regardless of the style of interview you choose, good interviews with prospective volunteers are crucial because they're the gateway to building an effective, committed volunteer team. A thoughtful interview process helps identify individuals whose skills, availability, and motivations align with the needs of the **CityServeX Site**, while allowing volunteers to understand expectations and determine if the opportunity matches their interests.

Interviews also establish the foundation for meaningful relationships, setting clear expectations that reduce misunderstandings and turnover. Additionally, they serve as an important risk management tool, particularly for roles that serve vulnerable populations or handle sensitive information.

When volunteers feel properly vetted and placed in positions that utilize their strengths, they experience greater satisfaction and make more valuable contributions, creating a virtuous cycle that strengthens the mission and impact in the community.

On the next page, **CityServeX** has provided some tips for conducting interviews.





Tips for Interviewing Volunteers

Before the Interview:

- Confirm date and time with your candidate, and other necessary details depending on your form of interview - in-person, virtual, or phone.
- Inform them that you'll be discussing the job description (if you are using one).
 - Be sure they know how to access it, or have received a copy from you to prepare.
- Review their application.
- Review volunteer role requirements and prepare questions that assess both skills and motivations.
 - Have a clear understanding of the time commitment and responsibilities you need filled. (i.e., 2 hrs. a week at a minimum.)
 - Remember to discuss the protected but personal use of their computer and cell phone, and the need to use a virtual meeting platform like Zoom or Google Meet, or Microsoft Teams.
- Be prepared to talk about the training and support available.
- Be prepared to take notes.
- Be prepared to share the next steps at the end of the interview (will a background check be required?)

Key Areas to Cover:

1. Motivation and Expectations:

- "What interests you about serving as a Resource Coordinator or Community Advocate?"
- "What do you hope to gain from this volunteer experience?"
- "What inspired you to volunteer with our organization in particular?"
- "Do they understand as a Resource Coordinator they will be encouraged to meet with people in person at times, and how do they feel about this?"

2. Experience and Skills:

- Ask about relevant past volunteer or work experience
- Discuss specific skills that match your needs
- Explore their comfort level with the required tasks
- Explore their experience in working remotely and if they have an environment conducive to this as a Resource Coordinator specifically

3. Reliability and Commitment:



- Discuss their schedule and other commitments
- Ask about their preferred volunteering schedule
- Explore how long they envision volunteering with your organization
- Discuss the importance of their faithfulness in serving, and logging their hours, and ask if they see any challenges with either

4. Cultural Fit:

- Share your organization's mission and values
- Ask about their experience working with diverse groups
- Discuss any challenging situations they've handled in past roles

5. Practical Tips:

- Create a welcoming atmosphere - remember they're giving their time freely
- Be transparent about requirements and expectations
- Listen carefully to understand their genuine interests
- Provide clear information
- Allow time for them to ask questions
- Share next steps in the process

After the Interview:

- Review their responses and make additional notes as you reflect on their responses and assess fit for specific roles.
- Wait for the results of their background check if required.
- Communicate with anyone else on your team if necessary before making a decision.
 - Consider whether you have the right support structure to help them succeed as a Resource Coordinator or Community Advocate.
- Schedule your follow-up with the candidate so no one is overlooked or forgotten, even if you intend not to invite them to your team.





Selecting Volunteers

9.7 You've recruited, you've interviewed, and possibly received clearance from a background check. Now it's time to select the individuals who align with your mission and whom you should invite to join your team as a volunteer. This is an exciting time and one that leaders are often ready to execute quickly. While it is important to move the recruitment process along so that the interest of a potential volunteer doesn't wane, we offer caution against moving too quickly and skipping over important steps or information in an attempt to fill a position quickly.

The following will encourage you to think thoroughly about the process for adding team members.

Review Your Documentation - Compare your interview notes against your selection criteria.

Cross Check Key Factors:

- Alignment with mission: How well do they understand and connect with your cause?
- Reliability: Did they show up on time for the interview and respond to communications?
- Skill match: Do they have the specific skills needed for the role?
- Time availability: Can they commit to your required schedule?
- Team fit: Will they work well with existing team members?
- Motivation: Are they volunteering for reasons that align with your organization's needs?

Decision-Making Framework:

- Address any concerns or red flags identified during the process
- Consider creating different volunteer roles to accommodate skill levels
 - This could be admins., researchers, or other needs you have
- Don't rush the decision—take time to find the right match

Remember, the selection process isn't just about finding volunteers—it's about finding the right volunteers who will contribute positively to your mission and sustain their service.





Extending an Invitation

9.8 Extending an invitation for someone to join your team to help fulfill the mission of your **CityServeX Site** is a pivotal moment. Handling this invitation well is one more important piece in your recruitment process. It is not until your candidates have accepted your invitation and completed their onboarding process, and then started fulfilling their role, that you can consider your recruitment process concluded.

Consider the following suggestions when inviting prospective volunteers to join your team -

- Contact selected volunteers promptly
- Clearly outline next steps (training, onboarding, and start dates)
- Be specific about their role and the support they'll receive
- Ask if they have any questions

For Prospective Volunteers Not Selected, consider the following -

- Thank them for their interest
- Be prepared to explain why they were not chosen - they may ask.
- If appropriate, suggest alternative volunteer opportunities that might be a better fit
- Keep candidates' information for future opportunities

Additionally, even when all open positions appear to be filled, **CityServeX** advises to always be in a posture of recruiting volunteers.





Training and Onboarding Volunteers

9.9 Congratulations! Your invitations for volunteer service have been accepted. Now it's time to set your new team members up for success from day one. A thoughtful onboarding experience does more than cover the basics — it communicates that each person is valued, that their role matters, and that they have joined something worth giving their best to.

Volunteers choose to give their time — honor that gift by making their first experience with your team welcoming, organized, and meaningful.

- **Note** - Even though members of your team may serve remotely, still develop an onboarding plan. You may want to arrange a place and a time to meet with them if possible, and go over some of the information relevant to your situation.

Before you can begin to train and onboard your team members, you must do the following -

- Ensure you have all the information you require in your Volunteer Management System
- Either confirm or schedule a training date with your **CityServeX** Liaison
 - There are format options available for training
- Notify your **CityServeX** contact of the email and phone extension needed for your volunteer
- Verify the email is working and notify your **CityServeX** Liaison
 - Upon a verified, working email, your **CityServeX** Liaison will add your volunteer as a user to the appropriate platforms and databases as needed for their role
- **Note** - even though volunteers will have platform and database access, they are not to start using them until training has occurred, and an NDA has been either signed, or acknowledged agreement and compliance with its terms.

CityServeX has provided information for a successful onboarding experience on the next few pages -





Training and Tips for Onboarding Volunteers

First Things First -

You have already contacted them and extended an invitation for them to join the team, and they accepted, but formality shouldn't be lost on their acceptance.

- Send a welcome email - confirming details of training and their first day of service, if possible
 - Remind your volunteers they will need a laptop or desktop computer for training, depending on the format.
 - Volunteers will be provided with training materials in advance of the training or on the day, depending on the format
- Introduce them to other team members through an email, text message, or other form of communication

Before Training can Occur -

As stated previously, a lot of autonomy is given to each Partner Site in developing their volunteer recruitment pathway as suited to their own needs, and organization. **CityServeX** only requires an NDA for each volunteer, and that each volunteer be fully trained by a **CityServeX** representative. However, upon offering a scheduled training, whether virtual, or in-person **CityServeX** asks Care Champions to consider -

Are your volunteers attending training to decide if they want to serve?

Or,

Have your volunteers decided to serve, and just need to be trained to be ready?

The answer and possibly the quantity of volunteers in answer to each question may affect content and delivery. This is important information to be communicated to your **CityServeX**

Liaison.

To further assist you we have provided the following as a Pre-Registration Checklist you may want to think through in determining if each of your volunteers is ready to attend training. We have provided the Checklist as a PDF form, and as an editable form in the Shared Drive between you and **CityServeX**. You may need to adjust the elements in the editable form and even paste them into a document of your own that you can use in your context.



- **Note** - the Pre-Registration Checklist is different from the Action Checklist. The Pre-Registration applies to preparation for training only. The Action Checklist concerns the entire process of building your team.





Pre-Registration Checklist

For Care Champions

Before registering volunteers for RC Training Sessions, confirm that the items below have been completed to your liking, and to the expectations of **CityServeX**.

DOCUMENTS & AGREEMENTS

- ☐ Volunteer application submitted and reviewed by Care Champion
- ☐ Job Description received and acknowledged as read by volunteer
- ☐ Background check completed and passed (if required by Partner Site)

ONE OF THE FOLLOWING REQUIRED BY CITYSERVEX -

- ☐ Confidentiality Agreement (NDA) received and acknowledged as read by volunteer BEFORE training
- ☐ Confidentiality Agreement (NDA) will be distributed AT or AFTER training

CONVERSATIONS & ORIENTATION

- ☐ Care Champion has had a one-on-one conversation with the volunteer to discuss their interest and review key documents
- ☐ Volunteer has attended a **CSX** Interest Meeting (if available and necessary)

COMMITMENTS & EXPECTATIONS CONFIRMED

- ☐ Willing to serve a minimum of 2 hours per week *(unless **Partner Site** makes an exception)*

THESE ELEMENTS WOULD BE REQUIRED OF A VOLUNTEER BY CITYSERVEX -

- ☐ Willing to use personal cell phone for calls — personal number will not be shared or compromised
- ☐ Willing to use personal laptop or desktop — no Participant data will be stored on personal devices
- ☐ Able to use Zoom, Google Meet, or Microsoft Teams for virtual meetings
- ☐ Has an environment conducive to serving remotely
- ☐ Willing and able to meet Participants in person at approved public locations that allow for private conversation
- ☐ Will commit to reporting service hours





LOGISTICS

- ❑ Shirt size collected (male or female sizing)

IN ACCORDANCE WITH PREVIOUS INSTRUCTION -

- ❑ **CSX** email created and Care Champion verified as working
- ❑ **CSX** acknowledged extension for volunteer created
- ❑ **CSX** created necessary logins and Care Champion verified as working

Once Training is Complete -

- Care Champions should follow up with their volunteers for feedback and an assessment of their confidence levels
- If any element previously mentioned as needing completion such as a Confidentiality Agreement (NDA), or even a shirt size acquired is not done, now is the time to attend to these details
- Confirm when each volunteer is ready to begin serving and reinforce how important their dependability and their role truly is
- **Note - CityServeX** believes that effective training is fundamental to team performance. Care Champions should communicate with their **CityServeX** Liaison any feedback that would be helpful, and if there is a need for repeated or new training developed. We are committed to providing both initial and ongoing training, coaching, and consulting as is necessary and helpful to each role.

First Day of Service -

Whether in-person or remote, make this day warm, personal, and encouraging. They said yes — now show them it was the right decision.

- Welcome them warmly and thank them again for their desire to serve, whether as a Resource Coordinator or Community Advocate
- Remind them of, and walk them through the virtual tools and platforms they will use
- Confirm their schedule. If their role is less structured, as with a Community Advocate, confirm how you will communicate about their activity
- Review their role at a high level - what it is and isn't
- Ensure they are clear on how to get started
- Discuss any necessary safety protocols





- For Resource Coordinators only - Provide the *Practices of an Excellent Resource Coordinator - Quick Start Guide* document. Walk through it together and answer any questions (document located at the end of this section)
- For Community Advocates only - Provide the *Practices of an Excellent Community Advocate - Quick Start Guide* document. Walk through it together and answer any questions (document located at the end of this section)
- Answer any questions
- Explain how to communicate with you for support

Second Day of Service and Beyond -

Depending on the volunteer's schedule and availability, subsequent days of service may not occur consecutively. They may take place over the course of a week or even a month, so plan accordingly. Make a point to follow up with them when they serve again and several times thereafter. Do not assume that one day of enthusiastic service is easily repeated. The following will help you think of additional things you might want to do -

- Thank them for returning to serve
- Review anything that may need clarification from the First Day of Service
- For Resource Coordinators only and when you see fit - Introduce the *Practices of an Excellent Resource Coordinator - Full Guide* document and explain how it will be used going forward (document located at the end of this section).
- For Community Advocates only and when you see fit - Introduce the *Practices of an Excellent Community Advocate - Full Guide* document and explain how it will be used going forward (document located at the end of this section)
 - **Note - these documents are also provided in a section of the Training Manual that an RC or CA receives.**
- Ask them to share any questions, highlights, or stories with you
- Ask if there is anything you can help them with

Ongoing Support -

Volunteers who feel supported stay. Make connection and encouragement a consistent part of your leadership:

- Consistent check-in meetings — in person or virtually
- Genuine, specific encouragement
- Informational and collaborative meetings and trainings





- Open, accessible communication
- Meaningful recognition of their contributions
- Invitation to social events with other volunteers and team members when possible

Evaluations -

Regular evaluation communicates that the volunteer's growth matters, that their service is taken seriously, and that you are open to learning how to improve your organization. Depending on how often they serve, you may want to adjust the following timeframes, i.e., a volunteer may serve 4 times in 30 days, or you may have to wait a month before they have actually served 30 days.

- 30-day check-in — How are they doing? Is the role what they thought? What do they need? Do they have any feedback?
- 60-day check-in and evaluation — Review progress, address any challenges, affirm growth, and seek feedback.
- 90-day acknowledgement — Recognition of service and celebration of what they've contributed.
- Annual volunteer review — Review the year. Recognize milestones. Seek feedback. Are there ways they can contribute to the growth and development of other RCs?
 - Celebrate their service and extend an invitation to continue, if warranted. Don't assume volunteers will keep serving from one year to the next, even if they have indicated they will. Extending an invitation either on the anniversary of their service or at the beginning of a new year is a way to honor them.

Volunteers are the heart of CityServeX's work. The way you welcome and develop them is a direct reflection of the care and dignity you extend to every Participant they will serve, or of the relationships they will make in the community.





Practices of an Excellent Resource Coordinator - Quick Start Guide

Welcome to the team! This guide gives you the essentials you need to get started with confidence. As you grow in the role, your full guide to practices of an excellent Resource Coordinator will be available for reference — but for now, focus here.

When You Meet a Participant

- **Show up warmly.** A smile, a genuine greeting, and your full attention are the most important things you bring to every interaction.
 - **Listen first.** Before anything else, create space for their story. You don't have to have all the answers — you just have to care enough to listen.
 - **Explain who you are.** Let them know you are a volunteer Resource Coordinator, part of a team, and here to help them find what they need.
 - **Complete the Intake Form together.** This guides your conversation and helps you identify their needs. Your training will walk you through it step by step.
 - **Leave them with something.** Before every meeting ends, aim to give the Participant at least one helpful resource and a clear next step.
 - **Schedule a follow-up.** Every Participant deserves to know you're coming back. Set the next appointment before you part ways.
-

After Every Meeting

- **Document within 24 hours.** Record your notes, the action plan, and any referrals in the CityServeX system while it's fresh.
- **Follow up within 6–10 days.** Reach back out to every Participant after the initial resource connection to check in and keep the momentum going.
- **Keep it confidential.** Everything shared with you stays with you and the CityServeX team — protect it carefully.





When You're Not Sure

- **Ask your Care Champion.** They are your go-to support person — no question is too small.
- **Never meet alone.** Always meet Participants in public settings. If something feels off, trust your instincts and reach out to your Care Champion.
- **You don't have to have all the answers.** Telling a Participant, "I'm going to find out and get back to you," is one of the most trustworthy things you can say.

What Matters Most

You are not a referral machine. You are a person who walks alongside other people in hard seasons of life. The resources matter — but *you* matter more. Your presence, your consistency, and your genuine care are what make the difference.

Ready to go deeper? Your full guide to practices of an excellent Resource Coordinator outlines everything that excellent RC work looks like over time. Your Care Champion will walk through it with you as you grow in the role.

Practices of an Excellent Resource Coordinator - Full Guide

This guide is designed to accompany your job description as a Resource Coordinator. It outlines what the full practices of an excellent Resource Coordinator look like over time. Your Care Champion will walk through it with you as you grow in the role.

Remember, becoming an excellent Resource Coordinator is a journey, not a checklist. The practices below reflect the full picture of what outstanding RC work looks like — but you won't be expected to master everything at once. Your Care Champion, your team, and your training are all here to support you as you grow into this role. Start with the Core Expectations, build your confidence, and trust that the rest will follow.

Thank you for serving your community with care!





CORE EXPECTATIONS

What Every RC Does from Day One

These are the foundations of the role. From your very first interaction, every RC is expected to demonstrate these qualities and practices.

First Impressions & Participant Interactions

- Present a professional appearance and demeanor in all settings
- Greet every Participant warmly — a genuine smile and welcoming presence go a long way
- Clearly explain the role of a Resource Coordinator and what the Participant can expect
- Give full attention to every Participant — listen with your eyes, your body, and your heart
- Treat every Participant with dignity, respect, and compassion, regardless of their circumstances

Participant Engagement & Assessment

- Conduct intake assessments using the **CityServeX** Intake Form and Care Wheel
- Listen actively and show genuine interest in each person's story
- Identify each Participant's most pressing needs and prioritize them together
- Position yourself as a partner in their journey — not a problem-solver, but a fellow traveler
- Communicate hope — every Participant should leave feeling less alone than when they arrived
- Provide at least one helpful, relevant resource before concluding any meeting
- Establish a clear follow-up schedule with every Participant before the interaction ends

Follow-Up & Support

- Follow up with **100% of Participants** within **6–10 days** of the initial resource connection
- Keep all scheduled follow-up meetings — in person, virtually, or by phone
- Maintain an encouraging tone in all follow-up communications





Security & Confidentiality

- Maintain strict confidentiality of all Participant information and organizational activities
- Never meet with a Participant alone in a non-public setting
- Alert appropriate personnel immediately of any safety or security concerns
- Follow all **CityServeX** security protocols — refer to the Safety Policy for full guidelines

Core Values in Action

- Handle sensitive information with absolute trustworthiness and discretion
- Show up dependably — punctuality and reliability matter to the people counting on you
- Demonstrate patience and grace in every Participant interaction
- Reflect the mission, values, and culture of **CityServeX** in all that you do

GROWING EXPECTATIONS

What Develops Over Time with Experience and Training

These practices build naturally as you gain confidence, receive feedback, and grow in the role. Your Care Champion will walk alongside you in developing these areas — you are not on your own.

Participant Services & Case Management

- Record all Participant meetings, action plans, and notes in the designated system within **24 hours** of each interaction
- Accurately utilize required software tools, including the Findhelp Staff Site and other platforms
- Maintain accurate, up-to-date Participant records at all times

Developing an Action Plan

- Collaborate with Participants to build personalized, achievable action plans
- Connect Participants to appropriate resources using the online tools provided





- Partner with your Care Champion and peers to identify additional resources within **3 business days**
- Communicate the status of acquired resources or information to the Participant within **5 business days**
- Document the action plan and provide a copy to the Participant in their preferred format — hard copy, email, or text

Administrative Performance

- Submit all required reports accurately and by established deadlines
- Demonstrate growing proficiency with required technology systems and software
- Organize your work effectively to manage multiple Participants and priorities without compromising quality

Development & Team Contribution

- Actively participate in all required training sessions and team meetings
- Bring resource ideas, process improvement suggestions, and observations to the team
- Seek feedback regularly and apply it constructively
- Support fellow RCs with a collaborative, team-first attitude

Practices are reviewed regularly in partnership with your Care Champion. Think of this document not as a bar to clear, but as a picture of who you are growing into.





Practices of an Excellent Community Advocate - Quick Start Guide

Welcome to the team! This guide gives you the essentials you need to get started with confidence. As you grow in the role, your full Practices of an Excellent Community Advocate document is available for reference — but for now, focus here.

When You're Out in the Community

- **Show up warmly.** A genuine smile, an outgoing personality, and an authentic interest in people are the most important things you bring to every interaction.
- **Know your story.** Be ready to explain what Resource Coordination is and why it matters in a simple, compelling way. Practice it until it feels natural.
- **Be a connector.** Your job is to connect assets to needs. Every conversation is a possible opportunity to uncover an asset that may be needed to help someone.
- **Listen first.** Before you talk about Resource Coordination, get curious about the person in front of you. People remember how you made them feel.
- **Follow up.** A new contact without a follow-up is just a conversation. Send a message, make a call, or set a meeting — keep the connection alive.

17 When You're Representing CityServeX at Events

- **Arrive prepared.** Know the purpose of the event, who will be there, and what you want to accomplish.
- **Represent well.** You are the face of CityServeX in your community. Your appearance, attitude, and energy all communicate who CityServeX is.
- **Share stories.** Know the difference the RCs on your team are making, and be prepared to talk about resources shared and lives impacted.
- **Invite people in.** Every event is an opportunity to grow the network — whether that's a new volunteer, a new partner, or a new advocate.

After Every Interaction





- **Follow up promptly.** Reach out to new contacts within a day or two while you're still fresh in their minds.
- **Keep notes.** Record significant conversations, new contacts, and partnership opportunities so nothing falls through the cracks.
- **Report to your Care Champion.** Share what you're seeing, hearing, and learning in the community — your insights are valuable to the whole team.

When You're Not Sure

- **Ask your Care Champion.** They are your go-to support person — no question is too small.
- **You don't have to know everything.** It's perfectly fine to say, *"That's a great question — let me find out and get back to you."* Honesty builds trust.
- **When in doubt, listen.** You can never go wrong by giving someone your full attention.

What Matters Most

You are not just a promoter or an event coordinator. You are a bridge — between people who need help and the community that can provide it, between individuals and entities that want to make a difference and a mission worth joining. The connections you make ripple out further than you'll ever fully see.

Ready to go deeper? Your full Practices of an Excellent Community Advocate document outlines everything that excellent CA work looks like over time. Your Care Champion will walk through it with you as you grow in the role.

Practices of an Excellent Community Advocate - Full Guide

This guide is designed to accompany your job description as a Community Advocate. It outlines what the full practices of an excellent Community Advocate look like over time. Your Care Champion will walk through it with you as you grow in the role.





Becoming an excellent Community Advocate is a journey, not a checklist. The practices below reflect the full picture of what outstanding CA work looks like — but you won't be expected to master everything at once. Your Care Champion, your team, and your training are all here to support you as you grow into this role. Start with the Core Expectations, build your confidence, and trust that the rest will follow.

Thank you for connecting your community with care!

CORE EXPECTATIONS

What Every CA Does from Day One

These are the foundations of the role. From your very first interaction, every CA is expected to demonstrate these qualities and practices.

First Impressions & Community Presence

- Present a professional appearance and demeanor in all settings and interactions
- Represent **CityServeX** warmly and enthusiastically — you are often the first face of this organization that community members will encounter
- Greet people with genuine interest and a welcoming personality
- Be approachable, outgoing, and easy to talk to — in person and virtually
- Treat every person you meet with dignity, respect, and cultural sensitivity

Relationship Building

- Actively develop and nurture authentic relationships with community members to identify assets within the community
- Begin making connections across all four lanes — businesses, faith communities, government agencies, and nonprofits — from the very start
- Follow up with new contacts in a timely and consistent manner
- Listen well — relationships are built on being heard, not just on being known
- Represent **CityServeX** at community events, meetings, and functions as directed by your Care Champion

Communication & Storytelling





- Communicate clearly and enthusiastically about the mission and the work of Resource Coordination
- Gather and share stories and successes that illustrate the real impact of this work
- Maintain an encouraging, positive tone in all communications

Security & Confidentiality

- Maintain strict confidentiality of all Participant information and organizational activities
- Maintain professional and appropriate boundaries with community members, partners, and volunteers at all times
- Alert appropriate personnel immediately of any safety or security concerns

Core Values in Action

- Handle sensitive information with absolute trustworthiness and discretion
- Show up dependably — your community contacts and your team are counting on you
- Demonstrate patience, cultural awareness, and grace in every interaction
- Reflect the mission, values, and culture of **CityServeX** in all that you do

GROWING EXPECTATIONS

What Develops Over Time with Experience and Training

These practices build naturally as you gain confidence, receive feedback, and grow in the role. Your Care Champion will walk alongside you in developing these areas — you are not on your own.

Partnership Development

- Identify and cultivate opportunities for collaboration and partnership within the community
- Build relationships with key stakeholders across all four lanes with increasing depth and intentionality
- Bring new partnership opportunities and community connections to your Care Champion regularly





- Facilitate or represent at coalition meetings and community gatherings with growing confidence and effectiveness

Community Engagement & Volunteerism

- Create and implement creative strategies to increase community participation and volunteerism
- Invite individuals and organizations to get involved in meaningful ways
- Help grow the network of people who know about and support the mission
- Track and share the results of your outreach efforts with your Care Champion

Hosting Informational Meetings

- Plan, coordinate, and execute informational meetings that educate and inspire others to get involved
- Develop comfort and confidence as a facilitator and public speaker over time
- Prepare well for every meeting — know your audience, your content, and your goal
- Gather feedback after each meeting and use it to improve future events

Documentation & Reporting

- Maintain organized records of community contacts, partnerships, events, and meetings
- Submit activity reports and updates accurately and by established deadlines
- Track progress toward community engagement goals and share updates with your Care Champion
- Document significant community interactions in the appropriate systems

Development & Team Contribution

- Actively participate in training sessions and team meetings
- Bring partnership ideas, community insights, and observations to the team
- Support fellow CAs and RCs with a collaborative, team-first attitude





Practices are reviewed regularly in partnership with your Care Champion. Think of this document not as a bar to clear, but as a picture of who you are growing into.





Building Your Team — Comprehension Questionnaire

Before moving forward, we'd like to invite you to pause and reflect on what you've read so far.

The following questions are designed to help you reflect and confirm your understanding of how to build a team to bring Resource Coordination to your community. There are no trick questions — the goal is simply to make sure you feel confident and clear before you begin building your team.

Review the questions below, then **complete and submit your responses using the link provided.**

1. According to the **CityServeX** Partner Site Organizational Chart, volunteer Resource Coordinators and Community Advocates report directly to:

- a) CityServeX headquarters
- b) The Care Champion
- c) The CityServeX Site Director
- d) Each other

2. Which of the following best describes the primary function of a Community Advocate?

- a) Conducting intake assessments and developing action plans with Participants
- b) Managing the Volunteer Management System and platform databases
- c) Building relationships, identifying community assets, and opening doors to collaboration across the four lanes
- d) Providing administrative support to the Care Champion

3. The CityServeX model recommends recruiting which two primary volunteer roles?

- a) Welcome Agents and Resource Coordinators
- b) Resource Coordinators and Community Advocates
- c) Community Advocates and Care Champions
- d) Resource Coordinators and Case Managers

4. **CityServeX** advises that even when all volunteer positions appear to be filled, a Partner Site should:



- a) Pause recruiting until a position opens
 - b) Focus only on retaining current volunteers
 - c) Always remain in a posture of recruiting
 - d) Refer potential volunteers to other organizations
-

5. When posting volunteer openings across multiple platforms, **CityServeX** recommends:

- a) Using one standard posting for all platforms to maintain consistency
 - b) Creating more than one job posting tailored to different platforms and word limits
 - c) Only posting on social media to reach the widest audience
 - d) Waiting until you have interviewed candidates before posting publicly
-

6. Part of a successful recruitment effort requires that you:

- a) Screen all applicants before responding to any inquiries
 - b) Can respond to every inquiry promptly
 - c) Have all volunteer positions filled before training begins
 - d) Only recruit from faith communities and local nonprofits
-

7. According to Section 5, when should a prospective volunteer receive the job description?

- a) Only after they have been selected and extended an invitation
 - b) Either during the inquiry or vetting process — the timing matters less than ensuring it is reviewed
 - c) Before they submit their application, so they can self-select
 - d) During their first day of service
-

8. Which of the following is listed as a Key Area to Cover during a volunteer interview?

- a) The volunteer's financial history
 - b) Their social media presence
 - c) Their motivation, expectations, and reliability
 - d) Their professional references only
-



9. After the interview, **CityServeX** recommends that you schedule a follow-up with the candidate:

- a) Only if you plan to invite them to join the team
- b) Only after a background check has been completed
- c) Regardless of whether you intend to invite them to your team
- d) Within 30 days of the interview

10. When extending an invitation to a volunteer who was NOT selected, what does **CityServeX** recommend you be prepared to do?

11. Before training and onboarding can begin, what must a Care Champion do regarding the volunteer's access to platforms and email? (Select all that apply.)

- a) Notify the **CityServeX** contact of the email and phone extension needed
- b) Verify the email is working
- c) Allow the volunteer to begin using the platforms immediately
- d) Notify the **CityServeX** Liaison to add the volunteer as a user to the appropriate platforms

12. In your own words, why does Section 5 emphasize that one day of enthusiastic service should not be assumed to be easily repeated?

13. Based on what you read in Section 5, what is the single most important thing you want to be intentional about as you begin building your team, and why?





Overall Confidence Rating

How confident do you feel in your ability to create a strategy to build your team?

Circle one:

- 1 — Not confident yet 2 — Somewhat unsure 3 — Getting there
4 — Mostly confident 5 — Very confident

Notes — what would help me feel more prepared:

Feedback — we welcome any comments from you that would help us improve the content of this section:

 [Click here to submit your responses](#)





Building Your Team - By Building a Strategy

You've done the reading. You've reflected on the questions. Now it's time to strategize.

The following document will give you a place to plan out how you will execute on the concept of building a team.

There are no right or wrong answers — only your answers, shaped by the context of your site, your community, and your vision for Resource Coordination.

Your strategy will be provided to your **CityServeX** Liaison when complete.

At the end of the document is a checklist for your additional benefit.





Building My Team - Strategy Planning Document

Part 1: My Site and My Vision

My **CityServeX** Site Name / Organization:

In a few sentences, describe the community you are building a team to serve:

What is your vision for what Resource Coordination will look like at your Site in one year?

Part 2: My Team

How many Resource Coordinators do I believe I need to start, and plan to recruit to allot for turnover?

How many Community Advocates do I believe I need to start?

What qualities matter most to me in the people I recruit? (Think about both roles.)





Are there any specific skills, languages, or community connections that would be especially valuable for my team?

Part 3: My Recruiting Strategy

Where do I plan to recruit volunteers? (List all channels you intend to use.)

Who in my existing network might I reach out to first?

How will I tell the story of Resource Coordination to generate interest before I am ready to formally recruit?

What communication channel will I set up and monitor for incoming inquiries?

Part 4: My Application and Vetting Process

Will I use CityServeX's sample volunteer application, create my own, or use the online version through the Volunteer Management System?





What additional steps will I require beyond the application? (Check all that apply and add any notes.)

- ☐ Assessment — Notes:

- ☐ Background check — Who pays? _____ At what stage?

- ☐ Reference checks — Notes:

- ☐ Skill or aptitude test — Notes:

- ☐ Other: _____

At what point in the process will prospective volunteers receive the job description?

- ☐ During the inquiry process
- ☐ During the vetting/interview process

Part 5: My Interview Plan

What format will I use for interviews?

- ☐ In-person
- ☐ Virtual
- ☐ Phone
- ☐ A combination — explain:

The three to five questions I plan to ask every candidate:

1. _____
2. _____
3. _____
4. _____
5. _____

How will I handle follow-up with candidates who are not selected?





Part 6: My Onboarding Plan

Describe how I will welcome new volunteers before their first day:

What does my plan for a volunteer's First Day of Service look like?

How will I stay connected with volunteers after their first few days of service?

How do I plan to recognize and celebrate volunteer contributions?

Part 7: My Timeline

Fill in your anticipated target dates for each phase.

Phase

Target Date

Begin telling the story / informal recruiting

Job postings live





Begin receiving applications

Begin conducting interviews

Phase

Target Date

Selections made / Invitations extended

Training scheduled with **CityServeX** Liaison

First volunteer(s) onboarded

First volunteer(s) begin serving

Part 8: My Biggest Questions and Concerns

*Before you move forward, capture anything that is still unclear or that you want to discuss with your **CityServeX** Liaison.*

Questions I still have:

Concerns or challenges I anticipate:





What support do I need from **CityServeX** to move forward?

Part 9: Share

Share this completed document with your **CityServeX** Liaison as part of your **Site** preparation process.

 [Click here to submit your responses](#)





Building My Team - A Checklist

The checklist on the following pages is your practical companion for every phase of the journey ahead — from your first recruiting effort to welcoming a volunteer on their first day of service and walking alongside them beyond it.

Adapt it to fit your context, return to it often, and complete the relevant sections for each volunteer you bring on. Think of it as both your roadmap and your record of the team you are building.

It is your option to use it, and it does not have to be provided to your **CityServeX** Liaison.





Action Checklist to Build My Team

Use this checklist as you work through the process of building your team for your **CityServeX Site**. Items are organized by phase. Check each item off as it is completed, and cross out any you don't intend to do.

Phase 1: Before You Recruit

- ☐ I can clearly describe the difference between a Resource Coordinator and a Community Advocate.
- ☐ I have identified where and how potential volunteers can reach me (monitored email, phone, etc.).
- ☐ I have a plan for how I will begin telling the story of Resource Coordination to generate interest.

Phase 2: Recruiting

- ☐ I have set a goal to recruit _____number of volunteers as Resource Coordinators, and _____number of volunteers as Community Advocates.
- ☐ I have identified at least two or three recruiting channels I will use (e.g., volunteer platforms, faith communities, chambers of commerce, social media).
- ☐ I have created or adapted a job posting for the Resource Coordinator role.
- ☐ I have created or adapted a job posting for the Community Advocate role (if recruiting for this role).
- ☐ My postings have been adapted for the platform(s) where I am sharing them.
- ☐ I have a communication channel set up that is actively monitored so I can respond to inquiries promptly.

Phase 3: The Application Process

- ☐ I have a volunteer application ready for prospective volunteers to complete (digital, paper, or both).
- ☐ I have decided whether I will require any of the following as part of my vetting process:
 - ☐ Assessments





- ☐ Background checks (and if so, who pays and when they are required)
 - ☐ Reference checks
 - ☐ I have a clear and simple path for prospective volunteers to follow from inquiry to application.
-

Phase 4: Job Descriptions and NDAs

- ☐ I have a job description ready for the Resource Coordinator role.
 - ☐ I have a job description ready for the Community Advocate role (if applicable).
 - ☐ I have decided at what point in the process a prospective volunteer will receive the job description.
 - ☐ I know at what point in the process a prospective volunteer will receive the NDA.
-

Phase 5: Interviewing

- ☐ I have reviewed the Tips for Interviewing Volunteers in Section 5 and feel prepared to conduct interviews.
 - ☐ I am prepared to talk about training, support, and next steps at the end of the interview.
 - ☐ I have a plan for following up with all candidates — selected or not — after the interview.
-

Phase 6: Selection

- ☐ I have reviewed each candidate's application and interview notes against the Cross Check Key Factors:
 - ☐ Alignment with mission
 - ☐ Reliability
 - ☐ Skill match
 - ☐ Time availability
 - ☐ Team fit
 - ☐ Motivation
- ☐ I have received the results of a background check if conducted.





- [] I have addressed any concerns or red flags identified during the recruitment process.
 - [] I have taken time to find the right match rather than rushing to fill a position.
-

Phase 7: Extending the Invitation

- [] I have contacted selected volunteers promptly.
 - [] I have clearly outlined the next steps — training date, onboarding details, and start date.
 - [] I have been specific about their role and the support they will receive.
 - [] I have followed up with candidates who were not selected and handled those conversations with care.
-

Phase 8: Pre-Onboarding Setup

- [] I have ensured all required information is entered in the Volunteer Management System.
 - [] I have confirmed or scheduled a training date with my **CityServeX** Liaison.
 - [] I have notified my **CityServeX** contact of the email and phone extension needed for each volunteer.
 - [] I have verified that each volunteer's email is working.
 - [] I have notified my **CityServeX** Liaison to add the volunteer as a user to the appropriate platforms and databases.
 - [] I have sent a welcome email confirming training details and the first day of service.
 - [] I have introduced the new volunteer to other team members.
-

Phase 9: Before Training can Occur

- [] I am clear on the reasons volunteers are participating in training.
- [] I have communicated the number of volunteers and their reason for attending training to the **CSX Liaison**.
- [] I have confirmed that volunteers will use their personal cell phones.
- [] I have confirmed that volunteers will use their personal laptop or desktop computer.
- [] I have confirmed that volunteers are able to conduct in-person and virtual meetings.





Phase 10: First Day of Service

- ☐ I welcomed the volunteer warmly and expressed genuine appreciation for their commitment.
- ☐ I walked them through the virtual tools and platforms they will use.
- ☐ I confirmed system access is in place.
- ☐ I confirmed their schedule and reinforced the importance of their dependability.
- ☐ I reviewed their role at a high level — what it is and what it is not.
- ☐ I discussed any necessary safety protocols.
- ☐ For RCs: I provided and walked through the *Practices of an Excellent Resource Coordinator — Quick Start Guide*.
- ☐ For CAs: I provided and walked through the *Practices of an Excellent Community Advocate — Quick Start Guide*.
- ☐ I explained how to reach me for questions and support.

Phase 11: Ongoing Support and Evaluation

- ☐ I have a regular check-in rhythm in place for each volunteer.
- ☐ Each volunteer has signed a Confidentiality Agreement.
- ☐ I have confirmed when each volunteer is ready to begin serving.
- ☐ For RCs (when appropriate): I have introduced the *Practices of an Excellent Resource Coordinator — Full Guide*.
- ☐ For CAs (when appropriate): I have introduced the *Practices of an Excellent Community Advocate — Full Guide*.
- ☐ 30-day check-in calendared: _____
- ☐ 60-day check-in and evaluation calendared: _____
- ☐ 90-day acknowledgement calendared: _____
- ☐ Annual volunteer review calendared: _____





Building Your Team - To Be Ready for What Comes Next

You've invested a lot of time in developing your plan to build your team.

Next, we'll talk about the tools you'll need to manage your team.

Step 3 — Volunteer Management follows.

