

INCOSE Volunteer & Paid Opportunities User's Guide April 2021



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Foreword

This document is the User's Guide for potential volunteers and INCOSE Leaders to use for volunteer opportunities.

Document Change History

The following table identifies each version or issue of this document and provides a description of the purpose or reason for the change. Performing a document comparison between any two versions of this document can identify detailed change differences.

Version	Date	Comment
0.1	14 Apr 2020	Initial Draft
0.2	20 May 2020	Updated the definition of terms and some other changes
1.0	2 Dec 2020	Updated after the webpages were updated
1.1	8 Mar 2021	Minor updates after using the websites.
1.2	20 Apr 2021	Changed to a Volunteer & Paid Opportunities site and aligned with INCOSE Position Description Documents (PDDs)

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1.0 Background

1.1 Background

The Volunteer & Paid Opportunities webpages provides a list of currently open volunteer and paid positions within INCOSE, and also the ability for a volunteer to offer their services as an “Open Volunteering” option.

There are two pages created to enter, view and respond to volunteer and paid opportunities:

- The “public” request/list [Volunteer Opportunities page](#), and
- The [Management Page](#) to add leaders, enter opportunities, etc.

1.2 Purpose

The purpose of this User's Guide is to provide a “step-by-step” overview on:

- How to add leaders
- How to add and manage an opportunity
- How to manage open volunteering
- How a potential volunteer would volunteer.

2.0 Definitions

2.1 Positions Involved

2.1.1 Volunteer Opportunities (VO) Administrator

The Volunteer Opportunities (VO) Administrator has the responsibility to monitor the program and work with leaders as needed.

2.1.2 Leader

For the purpose of volunteer opportunities, INCOSE Leaders should include:

- INCOSE Board of Directors
- INCOSE Associate Directors
- INCOSE Assistant Directors
- Nominations and Elections Committee (NEC) Chair
- NEC Secretary
- Certification Program Manager
- Professional Development Portal Project Manager
- Service Operations Leaders
- Technical Operations Leaders
- Working Group Team Leaders
- Up to three (3) members of a Chapter's Governing Body (eg President, Secretary, Treasurer, Comms, etc)

2.1.3 Secondary Point of Contact

A second point of contact besides the leader for the specific volunteer opportunity.

2.2 Opportunities

2.2.1 Volunteer Opportunity

An opportunity for a specific volunteer position submitted by an INCOSE Leader.

2.2.2 Open Opportunity

A potential volunteer isn't interested any of the specific volunteer opportunities, and as a result, submits an open volunteering opportunity for anywhere in INCOSE.

3.0 Responsibilities

This is keeping with the RACI Matrices used elsewhere in INCOSE.

3.1 Responsible R

The Responsible R for this User's Guide is the Assistant Director for Volunteerism.

3.2 Accountable A

The Accountable A is the Secretary.

3.3 Consulted C

The Consulted C's are:

- CIO and
- Director of Marketing & Communications

3.4 Management of the Volunteer Opportunities Pages

The management of the volunteer opportunities web pages is the responsibility of the Assistant Director for Volunteerism. The VO Administrator is a volunteer working for the INCOSE Secretary.

The VO Administrator will review all volunteer opportunities, ensure INCOSE Leaders contact potential volunteers, and monitor the overall program.

4.0 How to Add Leaders

This section describes how to add leaders to the Volunteer & Paid Opportunities webpages.

STEP 1 – The first step in adding a volunteer or paid opportunity is to add the leaders.

- Go to the [Managing Volunteer Opportunities Page](#).
- Once there, click the “Leaders” tab (the blue circle in Figure 4-1: Managing Opportunities – Leaders Tab).

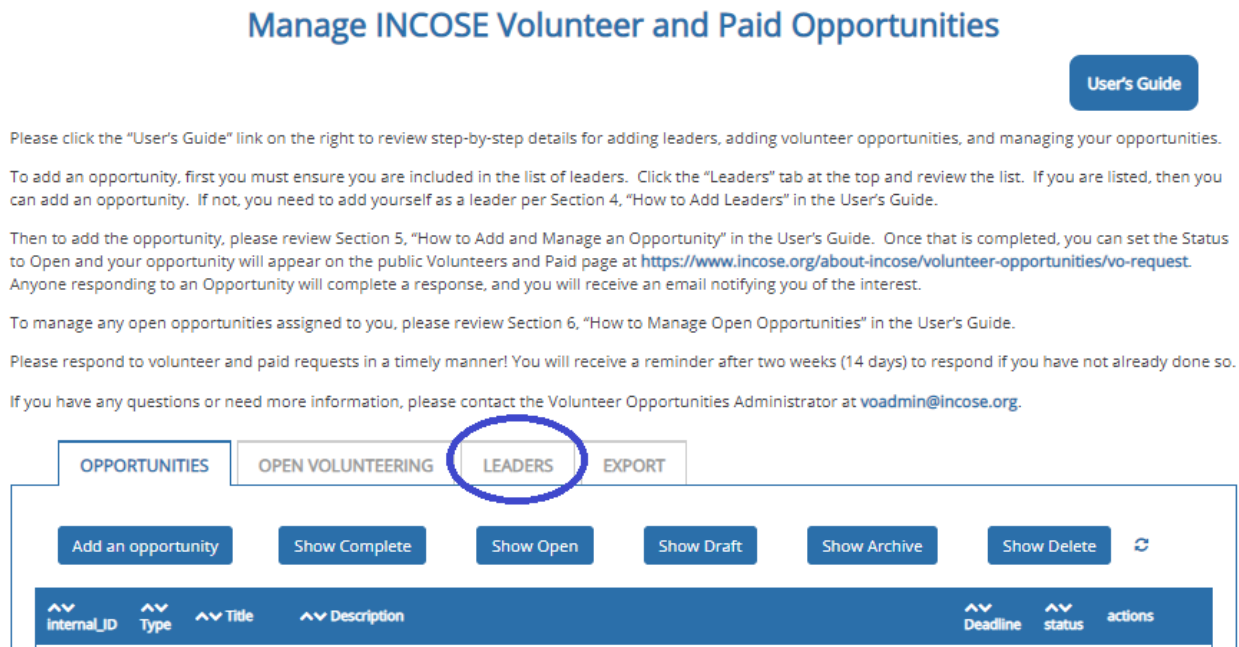


Figure 4-1: Managing Opportunities – Leaders Tab

STEP 2 – On the Leaders Tab, click the “Add a Leader” button (blue circle in Figure 4-2).

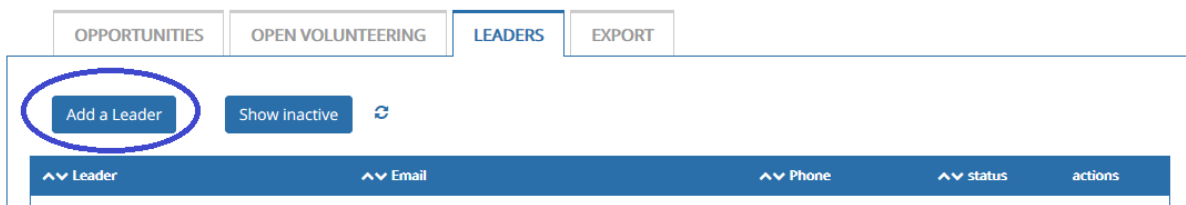


Figure 4-2: Add A Leader Tab

STEP 3 – On the “Add a new Leader Input Screen” (see Figure 4-3), add the following information for each leader:

- First Name
- Last Name
- Company
- Email
- Phone
- Status – Select either active or inactive in the pull-down menu (see the blue circle)

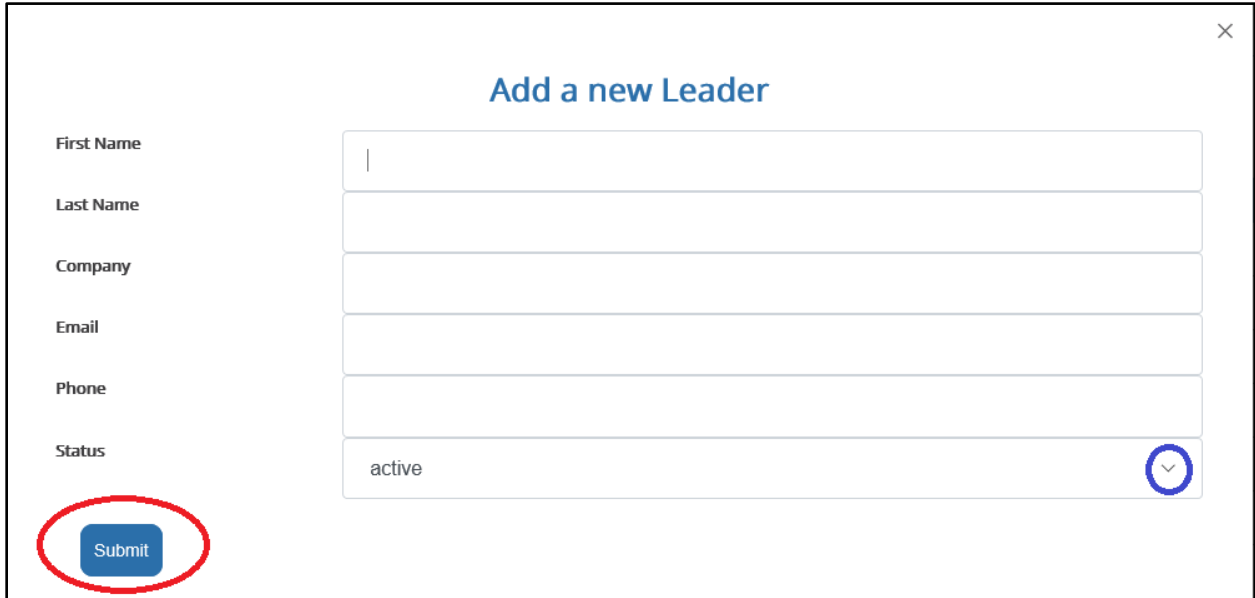
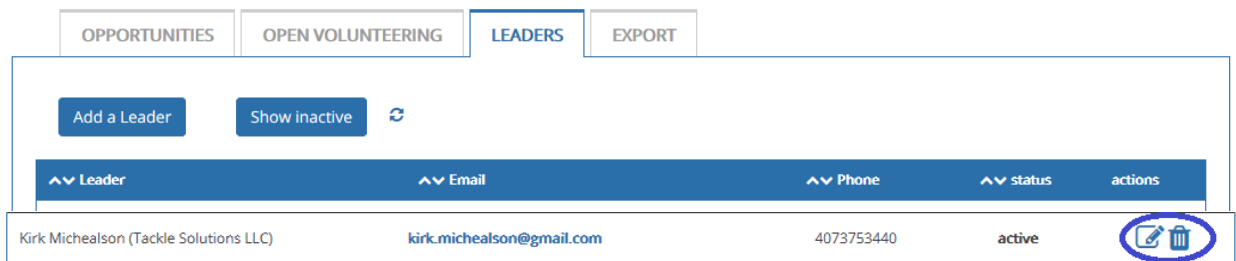


Figure 4-3 Add a New Leader Input Screen

After you enter the leader's information and click the submit button (red circle in Figure 4-3), you will briefly see a screen that states the leader was successfully entered. Then, as shown in Figure 4-4, the Leaders page will then be displayed.



LEADERS				
Add a Leader Show inactive ↻				
Leader	Email	Phone	status	actions
Kirk Michealson (Tackle Solutions LLC)	kirk.michealson@gmail.com	4073753440	active	

Figure 4-4 Volunteer Opportunities Leaders List

The up and down arrows to the left of each of the column headers allow you to sort the entire table based on the column selected. For example,

- Up arrow – the beginning of alphabet first going to end of alphabet or lowest number first going to highest number.

- Down arrow – the end of alphabet first going to the beginning of alphabet or highest number first going to lowest number.

In the “actions” column, there are two icons (see the blue circle in Figure 4-4).

- Square with a pencil – that is the edit capability. Clicking that will bring you to the “Add a New Leader Input Screen” (Figure 4-3) to update the leader’s information.
- Trash can – this will archive the leader and their information.

Once registered, the Leader can create a new Opportunity on the Opportunities tab. The leader can also now be assigned to respond to Open Volunteering inputs, by the AstD for Volunteerism.

5.0 How to Add and Manage an Opportunity

The volunteer and paid opportunities management page is accessible to INCOSE Leaders, to include the Board members, and appropriate leaders of committees, working groups and chapters. If anyone does not have access, and needs to be able to post or respond to volunteer opportunities, they should contact the INCOSE Admin office, info@incose.org, to be added to the access permissions.

The management page has four tabs, the list of Opportunities, submissions by Open Volunteering persons, the set of Leaders who can post or receive responses to the volunteering opportunities, and the ability to export the information.

5.1 Adding Volunteer & Paid Opportunities

STEP 1 – Go to the [Management Page](#) (see Figure 5-1). Ensure the “Opportunities” Tab is selected (black circle), and then click the “Add an opportunity” button (blue circle).



Figure 5-1 Managing Opportunities – Opportunities Tab

STEP 2 – Add a new opportunity.

Enter the following information as requested in Figure 5-2: (much of this is aligned with the INCOSE Position Description Documents (PDDs))

- Internal ID – An Identification number helps when sorting the list. Recommend a code and numbers. For example,
 - o CIO-001: This is the first volunteer opportunity for the CIO
 - o TO-002: This is the second volunteer opportunity for Tech Ops
 - o Americas-1: This is the first volunteer opportunity for the Americas Sector
- Type – This is a drop-down menu with “VOL” for volunteer and “PD” for paid.
- Opportunity Title – A title for the volunteer position.
- Position Description – Make this enticing! Give as much information as possible to help the applicant understand what is being asked.

- Benefits – This resonates the excitement and advantages. It is to describe the BENEFITS TO THE PERSON SUBMITTING, not to INCOSE.

The screenshot shows a web form titled "Add a new Opportunity" in blue text. The form is divided into two main sections. The left section contains labels for various fields: "Internal ID", "Type", "Opportunity Title", "Position Description", "Benefits", "Classification", "Responsibilities", and "Required Skills (i.e., pre-requisites & qualifications)". The right section contains the corresponding input fields. The "Type" field is a pull-down menu with "VOL" selected. The "Classification" field is also a pull-down menu with "Administrative" selected. The other fields are empty text boxes. The form has a light blue header and a light blue border.

Figure 5-2 Add a New Opportunity – Top Input Portion

- Classification – The type of volunteer opportunity. This is a pull-down menu and here are the options:
 - o Administrative – with administrative tasks
 - o Analytical – conducting some sort of analysis
 - o Board Position – a member of the INCOSE Board of Directors
 - o Editor – in charge of editing documents
 - o Events – supporting INCOSE events
 - o IT – conducting IT-related tasks
 - o Judge – judging some sort of competition
 - o Organizational Leadership – non-Board leadership role
 - o Project Management – doing project management related tasks
 - o Working Group – supporting the INCOSE Working Groups
 - o Other
- Responsibilities – The responsibilities of the volunteer opportunity.
- Skills Required (i.e., Prerequisites & Qualifications Held) – If there are any necessary experiences, skills, language, certification qualification, membership, etc.

Continuing with the Adding a new opportunity, enter the following information as requested in Figure 5-3:

- Means of Engagement – For example, virtual meetings, telecons, face-to-face meetings, remote access, etc.
- Work Location – For example, from your own location.
- Number Needed – Breakdown by tasks, could be different people.
- Working with – Indicate which position this is, not the person; don't want to state reporting to – too formal and "job like").
- Deadline – How long the volunteer opportunity will be open before closing.

NOTE: *If an opportunity is in an open status, the day after the deadline date the status will change to Archive. An email will be sent to the Lead Name 10 days prior to the deadline date.*

The screenshot shows the bottom portion of a form for adding a new opportunity. The form is divided into two main sections. The left section contains labels for various fields: Means of Engagement, Work location, Number needed, Working with, Deadline, Status, Lead Name, Secondary Point of Contact, and Internal Comments. The right section contains the corresponding input fields. The Status field has a blue pull-down menu icon. The Lead Name and Secondary Point of Contact fields have black and red pull-down menu icons, respectively. The Internal Comments field is a large text area. A blue 'Submit' button is located at the bottom left of the form.

Figure 5-3 Add a New Opportunity – Bottom Input Portion

- Status – The status of the volunteer opportunity. There is a pull-down menu (blue circle in Figure 5-3) with the following status selections:
 - o Complete – Volunteer Opportunity (VO) is complete, i.e., the position is filled or the process of accepting applications is done but the selection process not. The opportunity changes the status automatically to complete after the deadline.
 - o Open – VO is open, it is available for candidates to apply.
 - o Draft – VO is being created and draft. It is not available until the status is changed to open.
 - o Archive – VO has either been filled or cancelled / deleted. It is not needed now, but could be re-used in the future, so it is archived for future use.
 - o Delete – VO was cancelled and not needed. Therefore, can be deleted.
- Lead Name – Who is the primary point of contact. There is a pull-down menu (black circle in Figure 5-3) with the names from those leaders in the Leader's List (Section 4.0).
- Secondary Point of Contact – Who is the secondary point of contact. There is a pull-down menu (red circle in Figure 5-3) with the names from those leaders in the Leader's List (Section 4.0).
- Internal Comments – Anything to add for internal use only.

Below the bottom input portion is a blue “Submit” button. Click that and the opportunity will be posted on the public list if the Status is set to Open (see Figure 5-4).

From the “Add a New Opportunity” input form, the internal ID, type, classification, position title, position description, and the deadline for applying to the volunteer opportunity is displayed. In the Internal ID column all the way on the left, if the ID Number in the blue circle is clicked, the Volunteer Opportunity details entered in STEP 2 are displayed (see Figure 5-5 for an example).

INCOSE Volunteer and Paid Opportunities

Interested in volunteering or working in INCOSE? Here are some currently open volunteer and paid opportunities, and also the place for you to sign up for any other or future openings if none of these are in your area of interest.

Listed below are the current opportunities. The information in the second column "Type" will have "VOL" for volunteer opportunity and "PD" for paid opportunity. For the items below, click the Opportunity ID Number in the table to see full details about the volunteer opportunities currently available.

If none of these current open opportunities meet your interest, then click the "Submit your Open Volunteering application" button below the list to submit your contact details, and your comments and interests. Please include:

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org or review the How-To Guide via the button below the Volunteer and Paid Opportunities Table.

Internal_ID	Type	Classification	Title	Description	Deadline
DEI-001	VOL	Board Position	Associate Director for Diversity, Equity and Inclusion	The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.	2021-05-31
MEM - 201	VOL	Board Position	Associate Director of Membership Engagement	The INCOSE Associate Director of Member Engagement is an appointed position by the INCOSE Board of Directors with a three-year term of office. This individual is responsible to the Secretary for developing, maintaining and implementing Member Engagement strategy and tactics. The objective is to actively engage members in INCOSE and the Systems Engineering (SE) discipline to encourage their professional growth resulting in their long-term contribution and retention.	2021-05-01
ER-003	VOL	Working Group	Certification Application Reviewer	INCOSE CSEPs and ESEPs only: work on small, virtual team to assess application packages for CSEP certification. Attend initial and refresher training. Comply with INCOSE Privacy Policy to protect applicant information.	2021-10-31

Figure 5-4 Public Page – Open Volunteer & Paid Opportunities

Associate Director for Diversity, Equity and Inclusion	
Internal ID:	DEI-001
Type:	Volunteer Opportunity
Description:	The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.
Volunteering Benefits:	This role attends the INCOSE Board of Directors (BoD) and so the successful applicant has an excellent opportunity to understand how INCOSE operates. As Ascd DEI the successful applicant will have a high profile leadership role both within INCOSE and externally and hence a considerable opportunity for personal growth.
Classification:	Board Position
Responsibilities:	Experienced senior leader. Experience of leadership in a global/international context (highly desirable). Strong communication and interpersonal skills coupled with self-awareness and understanding of biases.
Pre-requisites & Qualifications Held:	Knowledge of and experience in Diversity, Equity, and Inclusion Global and cultural awareness Emotional Intelligence Broad perspective.
Means of Engagement:	Email, web meetings, and virtual/in-person conference attendance.
Work location:	Mostly remote, may choose to attend 2x/year in-person board meetings where this is possible.
Number of volunteers needed:	1.
Working with:	INCOSE President and Board of Directors, the INCOSE DEI Advisory Committee and engaging widely within INCOSE and externally.
Deadline:	2021-05-31
Status:	Open.
Point of contact	
Leader:	Garry Roedler (INCOSE)
Backup:	Alan Harding (INCOSE and BA2)
Submit your application	

Figure 5-5 Example Opportunity Details

Open Opportunities can be responded to by applicants, and the Leader identified as the point of contact will receive notification of the application.

5.2 Managing Your Opportunities

STEP 1 – The applicant will receive an email thanking them for their input and that someone from INCOSE will be contacting them within 14 days. An example is shown here.

Dear [name],

Thank you for submitting your interest on volunteering / consulting with INCOSE. We will review your position and you should receive an answer within 14 days.

All the best,
INCOSE Volunteer Team

The applicant will be given a status of “Received” per section 6.2 and the INCOSE Leader will receive an email with the following verbiage:

A new open application to your opportunity (**Opportunity Title**), is awaiting your review. To view the submission from (**Applicant Name**) (**Applicant Email**), click the Management Page link. Go to your volunteer opportunity, (**Internal ID**), and find the icons on the far right. Click the top icon (sheet of paper) to “View Details” about this submission.

The Management Page link is: <https://www.incose.org/about-incose/volunteer-opportunities/vo-request-manage>.

Thank you,
INCOSE Volunteer Team

STEP 2 – Responding to volunteer opportunities.

The leader is responsible for responding to the applicant within 14 days via email or phone and will receive a reminder email after 14 days.

Some possible examples of the response could be:

“Thank you for your interest in the (Opportunity Title) volunteer position. We are currently reviewing applicants and let you know by (specific date).”

Or

“Thank you for your interest in the (Opportunity Title) volunteer position. You have been selected for the position. Congratulations! (Name) will be reaching out to contact you in the next few days.”

STEP 3 – Updating open volunteer opportunities.

To manage the opportunities you created, go to the [Management Page](#) (Figure 5-6). Ensure the Opportunities tab is selected (black circle). When you go to this page, all the volunteer opportunities will be in alphabetical order by their Internal ID.

Based on the volunteer opportunity status, there are buttons at the top (red circle in Figure 5-6) for the VO Administrator and Leaders to change the view to be completed, open, draft, archived, and deleted opportunities.

The up and down arrows with each column provide the ability to sort the opportunities as described below Figure 4-4 in Section 4.0 “How to Add Leaders.”

Manage INCOSE Volunteer Opportunities

To add a new Volunteer Opportunity, first add yourself on the Leaders tab.
Once that is done, you can add Volunteer opportunities.
Fill in the form on the Opportunities tab, and once that is completed, you can set the Status to Open and your opportunity will appear on the public Volunteers page at <https://www.incose.org/about-incose/volunteer-opportunities/vo-request>

Any volunteer responding to an Opportunity will complete a response, and you will receive an email notifying you of the interest. Please respond in a timely manner! You will receive a reminder after a month to respond if you have not already done so.

OPPORTUNITIES

OPEN VOLUNTEERING

LEADERS

EXPORT

Add an opportunity

Show Complete

Show Open

Show Draft

Show Archive

Show Delete

internal_ID	Title	Description	Deadline	status	actions
CIO-001	Assistant Director IT for Communications	Review and propose improvements for our overall communications including email, web conferencing and other communication resources	2020-01-25	Complete	
TO-001	Survey Assessment		0000-00-00	Draft	

Figure 5-6 Managing Page – Opportunities Tab

The icons on the right side of the Opportunities Tab (Figure 5-6) are:

- Sheet of Paper with Lines (View Details) – This allows you to view the potential candidates that submit for your open opportunity.
- Square with Pencil (Edit Details) – The “Add a New Volunteer” input form created in Section 5.1 is displayed allowing the leader to update the opportunity.
- Two Squares (Duplicate) – Allows the leader to copy the opportunity to use for similar opportunities and / or additional opportunities. The duplicated opportunity will be at the bottom of all opportunities on the page in draft mode ready for editing.
- Square with an X (Excel) – Exports the volunteer opportunity to Excel. If there are any volunteer candidates, creates a second worksheet with the candidate information.
- Trash Can (Delete) – Allows the leader to delete the opportunity.

Most of the time, INCOSE Leader users will be clicking the “Show Open” button to manage their opportunities. When you click the top icon on the right (sheet of paper with lines) for your volunteer opportunity, you will have the opportunity to view your submissions (Figure 5-7).

The screenshot shows a web interface for managing volunteer candidates. At the top, it says "Certification Advisory Group member". Below this, there's a section for "Volunteer candidates" with five buttons: "Show Filled", "Show Received", "Show Contacted", "Show Cancelled", and "Show Refused". These buttons are circled in red. To the left of the buttons, there's a form with fields for "Internal ID:", "Description:", "Volunteer:", "Email:", "Phone:", "Submission date:", "Where do you work and what is your role:", "What systems experience do you have:", "What are your related background and experiences to the volunteer opportunity:", "Anything else you to let us know about you:", "Status:", and "Internal Comments:". To the right of the buttons, there's a candidate profile for Christopher Giudice, including his email, phone, submission date, and a status dropdown menu set to "Contacted". Below the status dropdown, there's a text box with internal comments: "Contacted 1 March 2021. Position will be filled May 2021." At the bottom right, there's a "Save" button.

Figure 5-7 Managing Page – Viewing Potential Candidates

The red oval in Figure 5-7 are the different applicant statuses.

- Filled – A volunteer candidate was accepted for the opportunity.
- Received – Volunteer candidate application received for the opportunity.
- Contacted – Volunteer candidate has been contacted about the opportunity.
- Cancelled – Volunteer candidate cancelled their application.
- Refused – Volunteer did not meet criteria of the volunteer opportunity or the position was already filled, etc. – i.e., the candidate was turned down.

Some opportunities can have many potential volunteers. This allows the INCOSE Leader users to just view their candidates by their application status. As a result, user won't have to scroll through candidates with the other statuses.

As shown in Figure 5-8, when you click the “Show Received” button for example, the volunteer opportunity is displayed with the title, internal ID, and description.

- The volunteer candidates are displayed with their name, email, phone, submission date, status, and their comments in the description line.
- When the INCOSE Leader contacts the applicant after they respond to an opportunity, in addition to the initial email, they will click the down arrow in the status box and change the applicant status from “Received” (in red circle) to “Contacted.”
- There is a box for internal comments for the leader and secondary point of contact.
- If there is more than one applicant, there will be scroll bar to view the other applicants as shown in the blue vertical rectangle. The INCOSE Leader will respond to each and every applicant.
- After an applicant's status is change and / or additional internal comments are added, the INCOSE Leader will click the blue Save button in the purple circle. A pop-up box will be displayed stating your changes have been saved.

The screenshot shows a web interface for managing volunteer candidates. At the top, it says 'Certification Advisory Group member'. Below this, there's a section for 'Volunteer candidates' with five buttons: 'Show Filled', 'Show Received', 'Show Contacted', 'Show Cancelled', and 'Show Refused'. The 'Show Received' button is highlighted. Below the buttons, there's a form for a volunteer candidate named Wayne Biden. The form includes fields for 'Volunteer', 'Email', 'Phone', 'Submission date', 'Where do you work and what is your role?', 'What systems experience do you have?', 'What are your related background and experiences to the volunteer opportunity?', 'Anything else you to let us know about you:', and 'Status'. The 'Status' field is set to 'Received' and is circled in red. Below the form, there's a section for 'Internal Comments' with a text area containing the comment 'Contacted 1 March 2021. Position will be filled May 2021.' and a 'Save' button.

Figure 5-8 Managing Page – View Details

Once received, the INCOSE Leader had 14 days to respond to the volunteer and change the status from “Received” to “Contacted.” If not, an automatic email is generated:

Dear [name],

The application to your opportunities <i>[oportunitee_name]</i>, added 14 days ago by [submiter_name], is waiting your review.

[submitter_description]

Please review at: <https://www.incose.org/about-incose/volunteer-opportunities/vo-request-manage>.

Thank you,
INCOSE Volunteer Team

5.3 Volunteer Cancels Their Application

Sometimes volunteers change their minds and do not want to submit an application for a volunteer opportunity. If so, the candidate will receive the following email:

Dear [name],

Your application has been cancelled.

All the best,
INCOSE Volunteer Team

At the same time, the respective INCOSE Leader will received this email:

Dear [name],

The application to your opportunity ([oportunitee_name]), has been cancelled by ([submiter_name]).

Thank you,
INCOSE Volunteer Team

5.4 Exporting Volunteer Opportunities Data

Manage INCOSE Volunteer Opportunities

To add a new Volunteer Opportunity, first add yourself on the Leaders tab.

Once that is done, you can add Volunteer opportunities.

Fill in the form on the Opportunities tab, and once that is completed, you can set the Status to Open and your opportunity will appear on the public Volunteers page at <https://www.incose.org/about-incose/volunteer-opportunities/vo-request>

Any volunteer responding to an Opportunity will complete a response, and you will receive an email notifying you of the interest. Please respond in a timely manner! You will receive a reminder after a month to respond if you have not already done so.

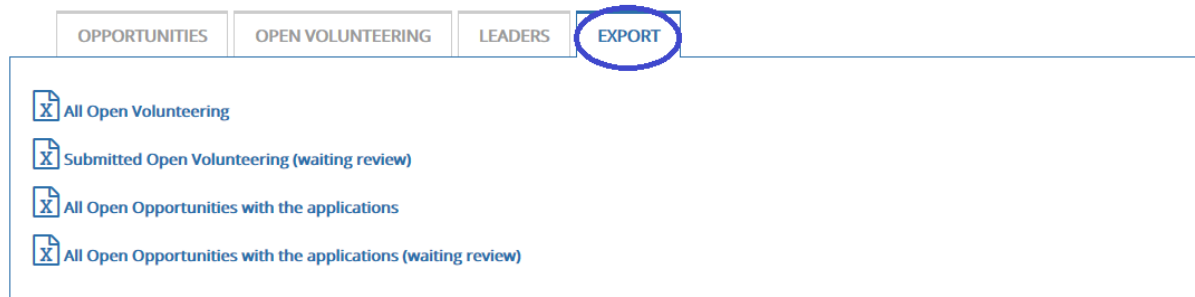


Figure 5-9 Managing Page – Export Tab

By clicking the Export Tab (blue circle in Figure 5-8), the leader and secondary point of contact can export the data four different ways per Figure 5-8. Once exported, the leader and secondary point of contact can tailor the document to just display their opportunities.

5.5 INCOSE Leader Questions

If INCOSE Leaders have questions, they can send an email to the VO Administrator at voadmin@incose.net.

6.0 How to Manage Open Opportunities

6.1 Volunteer Submits Open Volunteer Application

When a volunteer wants to volunteer with INCOSE but is not interested in any of the available opportunities, they can click the “Submit your Open Volunteer Application” button on the Volunteer Opportunities public page (See blue circle in Figure 6-1).

INCOSE Volunteer and Paid Opportunities

Interested in volunteering or working in INCOSE? Here are some currently open volunteer and paid opportunities, and also the place for you to sign up for any other or future openings if none of these are in your area of interest.

Listed below are the current opportunities. The information in the second column “Type” will have “VOL” for volunteer opportunity and “PD” for paid opportunity. For the items below, click the Opportunity ID Number in the table to see full details about the volunteer opportunities currently available.

If none of these current open opportunities meet your interest, then click the “Submit your Open Volunteering application” button below the list to submit your contact details, and your comments and interests. Please include:

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org or review the How-To Guide via the button below the Volunteer and Paid Opportunities Table.

Internal_ID	Type	Classification	Title	Description	Deadline
DEI-001	VOL	Board Position	Associate Director for Diversity, Equity and Inclusion	The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.	2021-05-31
MEM - 201	VOL	Board Position	Associate Director of Membership Engagement	The INCOSE Associate Director of Member Engagement is an appointed position by the INCOSE Board of Directors with a three-year term of office. This individual is responsible to the Secretary for developing, maintaining and implementing Member Engagement strategy and tactics. The objective is to actively engage members in INCOSE and the Systems Engineering (SE) discipline to encourage their professional growth resulting in their long-term contribution and retention.	2021-05-01
CER-003	VOL	Working Group	Certification Application Reviewer	INCOSE CSEPs and ESEPs only: work on small, virtual team to assess application packages for CSEP certification. Attend initial and refresher training. Comply with INCOSE Privacy Policy to protect applicant information.	2021-10-31
CER-001	VOL	Working Group	Certification Exam Item Reviewer	INCOSE SEPs only: Participate in webinars to review proposed exam questions. Work is done in a group with other INCOSE Systems Engineering Professionals. Perspectives of non-native English speakers are especially valued, alongside those of individuals with a variety of experiences including both new and experienced in the field of systems engineering.	2021-12-01
TO-005	VOL	Administrative	Deputy Assistant Director, Technical Events		2020-10-31
TIMLM-001	VOL	Working Group	Working Group Chair	The Tool Integration and Model Lifecycle Management WG provides a forum for discussion and information dissemination on best practices, methods and processes that promote the development, validation and deployment of standards that advance data exchange capability of digital data created during a product development lifecycle. The WG chair will participate with the TIMLM projects, with the PDES and LOTAR collaborations and in the administrative duties of INCOSE Technical Operations. The working group chair represents the working group in multiple working group collaborations, the workshops and symposiums. Applicant should be willing to shadow the current chair and become the TIMLM WG chair shortly after IS 2021.	2021-04-30

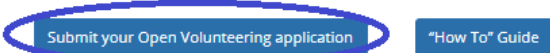


Figure 6-1 Submitting your Open Volunteering Application

When the volunteer clicks the button, the Open Volunteering Input Form (Figure 6-2) will open.

Submit an Open Volunteering

First Name

Last Name

Email address

Phone

Where do you work and what is your role?

What systems engineering experience do you have?

After viewing the INCOSE website and / or participating in an INCOSE Systems Exchange Café (see www.INCOSE.org homepage), what areas of INCOSE interest you?

What types of things do you like to do? Not like to do?

What are your interests?

What are your related background and experiences to the volunteer opportunity?

Anything else you want to let us know about you?

☐ I'm not a robot

reCAPTCHA

Submit

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org.

Figure 6-2 Open Volunteering Input Form

The potential volunteer enters their first name, last name, email address, phone, and some comments. On the Volunteer Opportunities page, they are asked to include the following:

- Where do you work and what is your role?
- What systems engineering experience do you have?
- After viewing the INCOSE website and / or participating in an INCOSE Systems Exchange Café (see www.INCOSE.org homepage), what areas of INCOSE interest you?
- What types of things do you like to do? Not like to do?
- What are your interests?
- What are your other related background and experiences?
- Anything else you want to let us know about you?

They will also need to check the “I’m not a robot” box. Then, the volunteer completes the form and clicks the “Submit” Button. They will briefly see the “Thank you for your submission” response and will receive the following email:

Dear [name],

Thank you for submitting your interest on volunteering with INCOSE. We will review your position and you should receive an answer within 14 days.

All the best,
INCOSE Volunteer Team

At the same time, the Assistant Director for Volunteerism will receive the following email:

Dear [name],

A new open volunteering has been added by [submitter_name].

[submitter_description]

Please review at: <https://www.incose.org/about-incose/volunteer-opportunities/vo-request-manage>.

Thank you,
INCOSE Volunteer Team

6.2 Assigning Open Volunteering Opportunities

The AstD for Volunteerism reviews the “Open Volunteering” tab (red circle on Figure 6-3) on the [Managing Page](#).

[User's Guide](#)

Please click the “User's Guide” link on the right to review step-by-step details for adding leaders, adding volunteer opportunities, and managing your opportunities.

To add an opportunity, first you must ensure you are included in the list of leaders. Click the “Leaders” tab at the top and review the list. If you are listed, then you can add an opportunity. If not, you need to add yourself as a leader per Section 4, “How to Add Leaders” in the User's Guide.

Then to add the opportunity, please review Section 5, “How to Add and Manage an Opportunity” in the User's Guide. Once that is completed, you can set the Status to Open and your opportunity will appear on the public Volunteers page at <https://www.incose.org/about-incose/volunteer-opportunities/vo-request>. Any volunteer responding to an Opportunity will complete a response, and you will receive an email notifying you of the interest.

To manage any open opportunities assigned to you, please review Section 6, “How to Manage Open Opportunities” in the User's Guide.

Please respond to volunteer requests in a timely manner! You will receive a reminder after two weeks (14 days) to respond if you have not already done so.

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org.

OPPORTUNITIES

OPEN VOLUNTEERING

LEADERS

EXPORT

Show Filled

Show Received

Show Contacted

Show Cancelled

Show Refused

Volunteer	Email	Submission date	Description	Assigned to	Status	actions
Ram Varman (veoneer gmbh)	ram.varman@veoneer.com	2020-06-22	INCOSE ID: 285424 LinkedIn: https://www.linkedin.com/in/ram-varman-6055/ Submitting my open volunteering request.	David Endler	Contacted	 
Ankesh Pratap (Continental automotive LLC)	ankesh.pratap@continental.com	2020-09-04	Interested in volunteering.	Richard Beasley	Contacted	 
Krishnapriya Kandasamy (stryker)	krishnapriya.kandasamy@gmail.com	2020-09-10	do let me know if you have any volunteering opportunities	Richard Beasley	Contacted	 
Nehal Patel (Cubic Corporation)	Nehal.Patel@Cubic.com	2020-09-14	Interested in applying for: TO-005 Deputy Assistant Director, Technical Events	Christopher Hoffman	Contacted	 
Abhinav Arun Kumar (IAV Automotive Engineering, Inc.)	abhinav.ak01@gmail.com	2020-10-05	I would like the opportunity to volunteer at INCOSE.	Not assigned	Contacted	 
Marcelo Almeida Silva (Mitsubishi Aircraft)	marcelo_almeida@mitsubishiaircraft.com	2020-10-06	I would be willing to volunteer as a pep reviewer.	Not assigned	Contacted	 

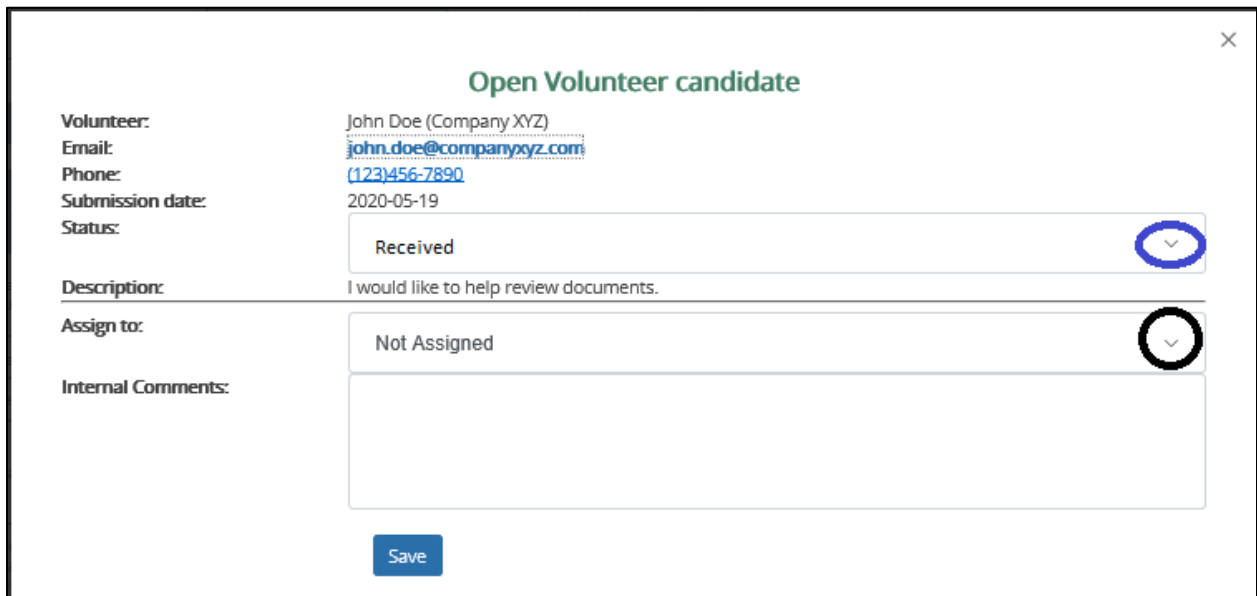
Figure 6-3 Managing Page – Open Volunteering Tab

Similar to the opportunities page, there are 5 buttons to select the appropriate status (i.e., filled, received, contacted, cancelled, and refused) for each of the open volunteering requests (see the blue circle in Figure 6-3).

When a new open opportunity is submitted (“Received” status), the AstD for Volunteerism clicks the paper with lines in the Actions column (far right column) and the Open Volunteer Candidate screen opens (Figure 6-4).

The AstD Volunteerism reviews the candidate and then does the following for the initial application:

1. Status – Using the pull-down menu on the right (blue circle), changes to “Received” (if not already).
2. Reviews the information to determine which INCOSE Leader to assign.
 - a. If enough information, then the AstD for Volunteerism will assign an INCOSE leader by in the Assign to row, use the pull-down menu on the right (black circle), assign an INCOSE Leader.
 - b. If not enough information, the AstD for Volunteerism will send an email to the potential volunteer asking for more information and change the status to “Contacted.”
3. Then click the Save blue button. A pop-up box will be displayed stating your changes have been saved.



Open Volunteer candidate

Volunteer: John Doe (Company XYZ)
Email: john.doe@companyxyz.com
Phone: (123)456-7890
Submission date: 2020-05-19
Status: Received
Description: I would like to help review documents.
Assign to: Not Assigned
Internal Comments:
Save

Figure 6-4 Open Volunteer Candidate

6.3 Managing Open Volunteering Opportunities

When the AstD for Volunteerism assigns an INCOSE Leader, the selected leader will receive an email

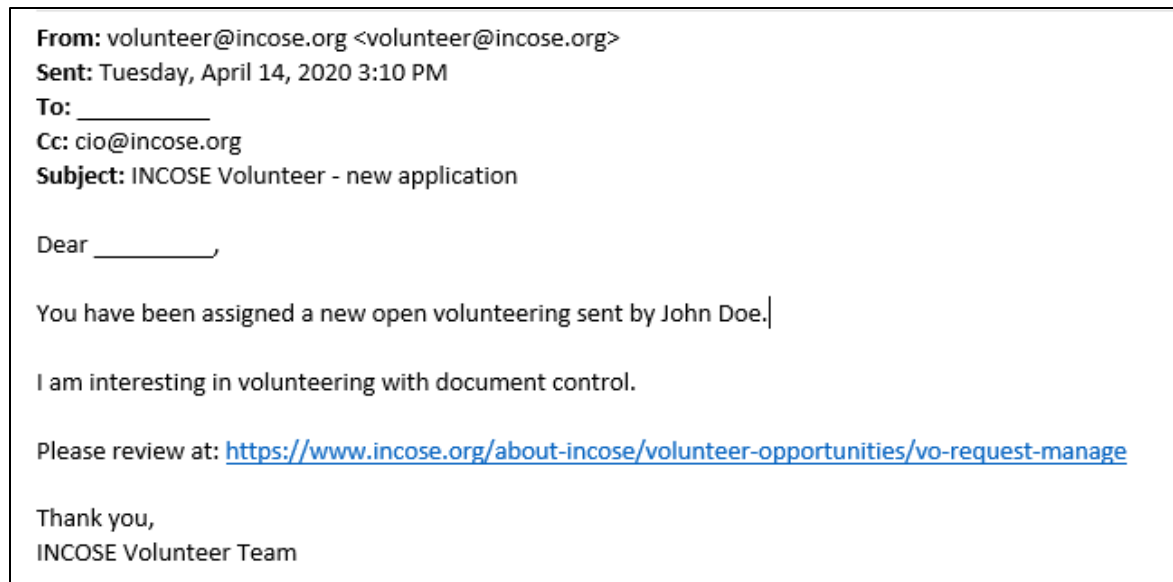


Figure 6-5 Open Volunteer Email Notification

Similar to managing your volunteering opportunities, the leader is also responsible for responding to the applicant within 14 days via email or phone and will receive a reminder email if the response remains unaddressed.

Dear [name],

The open volunteering added 14 days ago by [submitter_name], is waiting your review.

[submitter_description]

Please review at: <https://www.incose.org/about-incose/volunteer-opportunities/vo-request-manage>

Thank you,
INCOSE Volunteer Team

There will be an automatic email to the potential volunteer candidates when the application is cancelled:

Dear [name],

Your application has been cancelled.

All the best,
INCOSE Volunteer Team

The respective INCOSE Leader will also receive an email when the volunteer candidate cancels their application:

Dear [name],

The open volunteering has been cancelled by [submitter_name].

[submitter_description]

Thank you,
INCOSE Volunteer Team

The INCOSE Leader is responsible for contacting the potential volunteer candidate when changing the status to the Contacted, Filled, and Refused statuses.

This User's Guide is available via a button on the top right of the Management Page.

7.0 How Do Volunteers Volunteer?

The following is how potential volunteers volunteer and apply with INCOSE.

7.1 Responding to Specific Opportunities

The potential volunteer / consultant goes to the [Volunteer Opportunities](#) public page (Figure 7-1) and select an opportunity they are interested in.

INCOSE Volunteer and Paid Opportunities

Interested in volunteering or working in INCOSE? Here are some currently open volunteer and paid opportunities, and also the place for you to sign up for any other or future openings if none of these are in your area of interest.

Listed below are the current opportunities. The information in the second column "Type" will have "VOL" for volunteer opportunity and "PD" for paid opportunity. For the items below, click the Opportunity ID Number in the table to see full details about the volunteer opportunities currently available.

If none of these current open opportunities meet your interest, then click the "Submit your Open Volunteering application" button below the list to submit your contact details, and your comments and interests. Please include:

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org or review the How-To Guide via the button below the Volunteer and Paid Opportunities Table.

Internal_ID	Type	Classification	Title	Description	Deadline
DEI-001	VOL	Board Position	Associate Director for Diversity, Equity and Inclusion	The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.	2021-05-31
MEM - 201	VOL	Board Position	Associate Director of Membership Engagement	The INCOSE Associate Director of Member Engagement is an appointed position by the INCOSE Board of Directors with a three-year term of office. This individual is responsible to the Secretary for developing, maintaining and implementing Member Engagement strategy and tactics. The objective is to actively engage members in INCOSE and the Systems Engineering (SE) discipline to encourage their professional growth resulting in their long-term contribution and retention.	2021-05-01

Figure 7-1 Available Volunteer Opportunities

For example, let's say they are interested in DEI-001 Associate Director for Diversity, Equity, and Inclusion in Figure 7-1. The potential volunteer clicks the DEI-001 in the Internal ID column and the Opportunity Details screen (Figure 7-2) pops up.

Associate Director for Diversity, Equity and Inclusion

Internal ID: DEI-001

Type: Volunteer Opportunity

Description: The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.

Volunteering Benefits: This role attends the INCOSE Board of Directors (BoD) and so the successful applicant has an excellent opportunity to understand how INCOSE operates. As AsCD DEI the successful applicant will have a high profile leadership role both within INCOSE and externally and hence a considerable opportunity for personal growth.

Classification: Board Position

Responsibilities: Experienced senior leader. Experience of leadership in a global/international context (highly desirable). Strong communication and interpersonal skills coupled with self-awareness and understanding of biases.

Pre-requisites & Qualifications Held: Knowledge of and experience in Diversity, Equity, and Inclusion Global and cultural awareness Emotional Intelligence Broad perspective

Means of Engagement: Email, web meetings, and virtual/in-person conference attendance

Work location: Mostly remote, may choose to attend 2x/year in-person board meetings where this is possible

Number of volunteers needed: 1

Working with: INCOSE President and Board of Directors, the INCOSE DEI Advisory Committee and engaging widely within INCOSE and externally

Deadline: 2021-05-31

Status: Open

Leader: Garry Roedler (INCOSE)

Backup: Alan Harding (INCOSE and BA2)

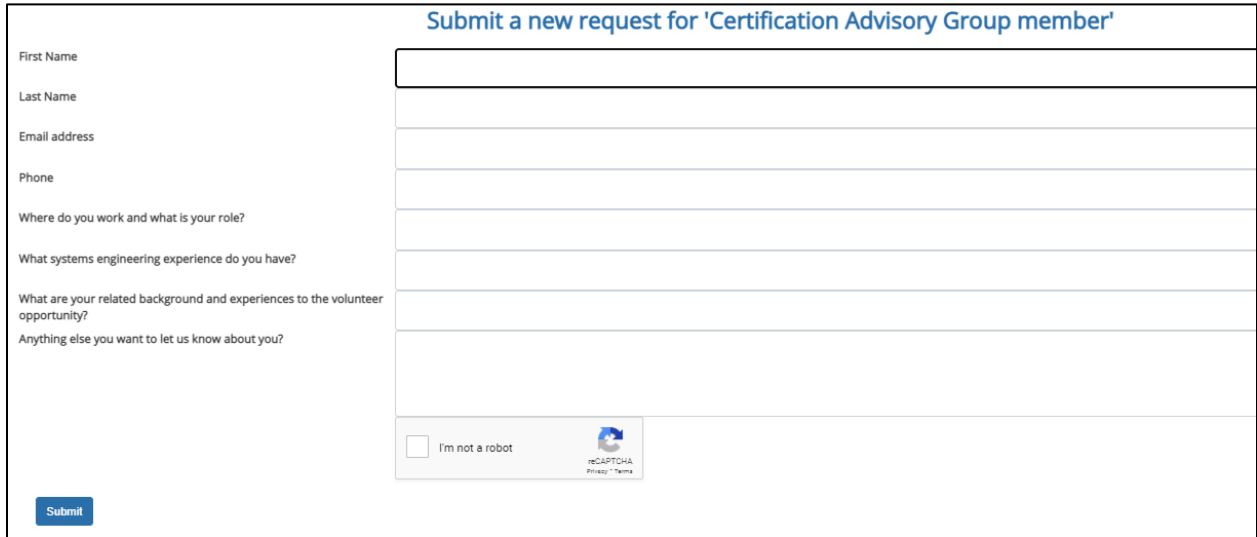
Point of contact

[Submit your application](#)

Figure 7-2 Opportunity Details

If the potential applicant is interested in the opportunity after reviewing the details, they click the "Submit your application" button and the Submitting a New Request Input form opens (Figure 7-3). The potential candidate enters their first name, last name, email address, phone

number, and answers additional background and experience questions. Then they check the “I’m not a robot box” (blue circle) and click the submit button.



The screenshot shows a web form titled "Submit a new request for 'Certification Advisory Group member'". The form is divided into two main sections. The left section contains labels for the input fields: "First Name", "Last Name", "Email address", "Phone", "Where do you work and what is your role?", "What systems engineering experience do you have?", "What are your related background and experiences to the volunteer opportunity?", and "Anything else you want to let us know about you?". The right section contains the corresponding input fields, which are empty text boxes. At the bottom of the form, there is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with links for "Privacy" and "Terms". A blue "Submit" button is located at the bottom left of the form.

Figure 7-3 Submitting a New Request Input Form

7.2 Volunteering for Open Opportunities

When a volunteer wants to volunteer with INCOSE, but they are not interested in any of the available opportunities, they can click the “Submit your Open Volunteer Application” button on the Volunteer Opportunities public page (Figure 7-4).

INCOSE Volunteer and Paid Opportunities

Interested in volunteering or working in INCOSE? Here are some currently open volunteer and paid opportunities, and also the place for you to sign up for any other or future openings if none of these are in your area of interest.

Listed below are the current opportunities. The information in the second column "Type" will have "VOL" for volunteer opportunity and "PD" for paid opportunity. For the items below, click the Opportunity ID Number in the table to see full details about the volunteer opportunities currently available.

If none of these current open opportunities meet your interest, then click the "Submit your Open Volunteering application" button below the list to submit your contact details, and your comments and interests. Please include:

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org or review the How-To Guide via the button below the Volunteer and Paid Opportunities Table.

Internal_ID	Type	Classification	Title	Description	Deadline
DEI-001	VOL	Board Position	Associate Director for Diversity, Equity and Inclusion	The INCOSE Associate Director for Diversity, Equity and Inclusion (DEI) is an appointed position with a three-year term of office. The position reports to the INCOSE President. The Associate Director for DEI is the INCOSE lead on diversity, equity, and inclusion, is INCOSE's principal spokesperson on the subject, and leads the DEI Advisory Committee.	2021-05-31
MEM - 201	VOL	Board Position	Associate Director of Membership Engagement	The INCOSE Associate Director of Member Engagement is an appointed position by the INCOSE Board of Directors with a three-year term of office. This individual is responsible to the Secretary for developing, maintaining and implementing Member Engagement strategy and tactics. The objective is to actively engage members in INCOSE and the Systems Engineering (SE) discipline to encourage their professional growth resulting in their long-term contribution and retention.	2021-05-01
CER-003	VOL	Working Group	Certification Application Reviewer	INCOSE CSEPs and ESEPs only; work on small, virtual team to assess application packages for CSEP certification. Attend initial and refresher training. Comply with INCOSE Privacy Policy to protect applicant information.	2021-10-31
CER-001	VOL	Working Group	Certification Exam Item Reviewer	INCOSE SEPs only; Participate in webinars to review proposed exam questions. Work is done in a group with other INCOSE Systems Engineering Professionals. Perspectives of non-native English speakers are especially valued, alongside those of individuals with a variety of experiences including both new and experienced in the field of systems engineering.	2021-12-01
TO-005	VOL	Administrative	Deputy Assistant Director, Technical Events		2020-10-31
TIMLM-001	VOL	Working Group	Working Group Chair	The Tool Integration and Model Lifecycle Management WG provides a forum for discussion and information dissemination on best practices, methods and processes that promote the development, validation and deployment of standards that advance data exchange capability of digital data created during a product development lifecycle. The WG chair will participate with the TIMLM projects, with the PDES and LOTAR collaborations and in the administrative duties of INCOSE Technical Operations. The working group chair represents the working group in multiple working group collaborations, the workshops and symposiums. Applicant should be willing to shadow the current chair and become the TIMLM WG chair shortly after IS 2021.	2021-04-30

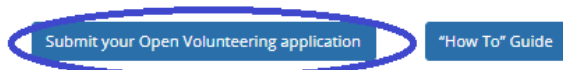


Figure 7-4 Submitting your Open Volunteering Application

When the volunteer clicks the button, the Open Volunteering Input Form (Figure 7-5) will open.

The potential volunteer enters their first name, last name, email address, phone, and some comments. On the Volunteer Opportunities page, they are asked to include the following:

- Where do you work and what is your role?
- What systems engineering experience do you have?
- After viewing the INCOSE website and / or participating in an INCOSE Systems Exchange Café (see www.INCOSE.org homepage), what areas of INCOSE interest you?
- What types of things do you like to do? Not like to do?
- What are your interests?
- What are your other related background and experiences?
- Anything else you want to let us know about you?

They will also need to check the “I’m not a robot” box. Then, the volunteer completes the form and clicks the “Submit” Button. They will briefly see the “Thank you for your submission” response and will receive the following email:

Dear [name],

Thank you for submitting your interest on volunteering with INCOSE. We will review your position and you should receive an answer within 14 days.

All the best,
INCOSE Volunteer Team

Submit an Open Volunteering

First Name

Last Name

Email address

Phone

Where do you work and what is your role?

What systems engineering experience do you have?

After viewing the INCOSE website and / or participating in an INCOSE Systems Exchange Café (see www.INCOSE.org homepage), what areas of INCOSE interest you?

What types of things do you like to do? Not like to do?

What are your interests?

What are your related background and experiences to the volunteer opportunity?

Anything else you want to let us know about you?

☐ I'm not a robot

reCAPTCHA

Privacy - Terms

Submit

If you have any questions or need more information, please contact the Volunteer Opportunities Administrator at voadmin@incose.org.

Figure 7-5 Open Volunteering Input Form

7.3 Volunteer Questions

If the potential volunteer has any questions or needs more information, there is a button on the bottom of the Volunteer Opportunities page with a “How To” Guide. They can also send an email to the Assistant Director for Volunteerism at voadmin@incose.net. The AstD for Volunteerism will respond within three (3) days.

8.0 Emails: Automatic and Sent by INCOSE Leaders

During the volunteer process, some emails are sent automatically, while others are sent by the INCOSE Leaders. This section will provide an overview of these emails.

8.1 Applicant Responding to a Volunteer Opportunity

In Section 7.1 Volunteering for Specific Opportunities, a potential volunteer responds to a volunteer opportunity. Per Section 5.2 Managing Your Opportunities,

- (1) The applicant will automatically receive an email thanking them for their input and that someone from INCOSE will be contacting them within 14 days, and
- (2) The INCOSE Leader will automatically receive an email stating a new potential volunteer responded to their volunteer opportunity.

8.2 Applicant Volunteering for an Open Volunteering

In Section 7.2 Volunteering for Open Opportunities, a potential volunteer volunteers in general. Per section 6.0 How to Manage Open Opportunities,

- (1) The applicant will automatically receive an email thanking them for their input and that someone from INCOSE will be contacting them within 14 days, and
- (2) The Assistant Director for Volunteerism will automatically receive an email stating an applicant would like to volunteer with INCOSE.
- (3) The AstD for Volunteerism will select an INCOSE Leader who will automatically receive an email stating a new potential volunteer would like to volunteer with INCOSE.

8.3 INCOSE Leader Reminders for New Volunteers

In the automatic response when a volunteer volunteers (Sections 8.1 and 8.2), the email states someone from INCOSE will respond within 14 days.

- (1) If the INCOSE Leader does not contact the potential volunteer and change the applicant status to Contacted, Filled, or Refused, then an automatic email reminder is sent to the INCOSE Leader.
- (2) If the INCOSE Leader changes the applicant status from Received to Contacted, Filled or Refused, then the automatic email reminder after 14 days is not sent.

8.4 Change of Applicant Status Emails

8.4.1 Change of Status by Applicant

There are two applicant status changes that are caused by the applicant.

- (1) Received – When an applicant responds to a volunteer opportunity or does open volunteering, the emails are per sections 8.1 and 8.2.
- (2) Cancelled – When an applicant cancels their applicant, a thank you for their interest email is automatically sent to the applicant and the INCOSE Leader.

8.4.2 Change of Status by the INCOSE Leader

The other three applicant statuses require contact via email or phone by the INCOSE Leaders:

(1) Contacted –

- Volunteer candidate has been contacted about the opportunity.
- The INCOSE Leader will contact the applicant.

(2) Filled –

- Volunteer candidate was accepted for the opportunity.
- The INCOSE Leader informs the applicant they were accepted for the opportunity.

(3) Refused –

- Volunteer did not meet criteria of the volunteer opportunity or the position was already filled, etc. – i.e., the candidate was turned down.
- The INCOSE Leader will contact the applicant and let them know.

8.5 Additional Contact with the Potential Volunteer

Additional contact between the INCOSE Leader and the potential volunteer are at the discretion of the INCOSE Leader and their team.