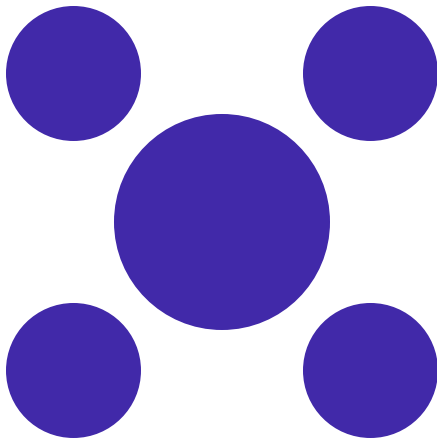


PMI Chapter Leaders' Guide:

Columbia River Basin Chapter Volunteer Roles & Responsibilities - 2023





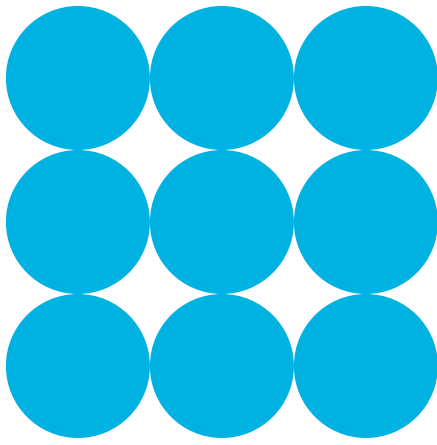
Contents

About this Guidance Document

This guide provides background information and summarizes the Columbia River Basin Chapter's elected and appointed Volunteer Roles and Responsibilities as identified by the CRB Chapter Bi-Laws, polices and by the identified roles as determined by the PMI Delineation Studies (RDS).

This document includes detailed descriptions of each chapter volunteer's role and how they directly support effective chapter operations.

Welcome PMI Help and Resources	3
Introduction	4
President, Vice President, Immediate Past President	
President/CEO	6
President Elect/Executive Vice President	8
Programs	9
Immediate Past President	11
VP-Operations	
Administration/Secretary	12
Governance	13
VP-Finance/Treasurer	
Finance/Treasurer	14
VP-Membership	
Membership	16
Military Outreach (US)	17
VP-Communications	
Communications	19
VP-Public Relations & Marketing	
Marketing	20
Publications	22
VP-Professional Development	
Certification	21
Professional Development/Education	22
Professional Development Champion	23
Directory of IT/Technology	
IT/Technology	24
Webmaster	25
Director of Social Media	
Social Media	27
Social Impact Outreach	28
Director of Mentoring	
Mentoring	29
Director of Corporate Ambassadors & Outreach	
Business/Corporate Outreach	30
Sponsorship	31
Director of Academic Outreach	
Academic and Rising Leaders Outreach	32
Other	
Events	34
Volunteer Engagement	35
Resources and Tools.....	36



WELCOME

Provided by PMI for chapter members and volunteers: The following two pages describe the PMI specially trained team and the available support for assisting Chapter volunteer leaders and members.

Chapter Engagement Support Staff

PMI has chapter engagement staff across the globe to support you and your chapter. To determine the chapter staff in your region, visit the Chapter Partner Contacts list in [PMInsight](#).

Manager, Chapter Engagement: A PMI staff member assigned to a specific region who provides overall leadership and oversight of relationships, functions and services for the establishment, development and maintenance of PMI chapters to a specific region.

Chapter Engagement Partners: PMI staff assigned to chapters who provide support for annual chapter operation planning and execution. The chapter engagement partners perform the following activities:

- Evaluate results to drive new and/or improved plans.
- Maintain ongoing partnerships with chapters to ensure their annual success.
- Support chapter leadership in board development and transition planning.
- Support community development through chapter formation, chapter reorganization, annual planning and reporting objectives.

Chapter Operations Analysts: PMI staff who work with assigned chapters to provide ongoing guidance, maintenance and support of general chapter operations. The chapter operations analysts are responsible to:

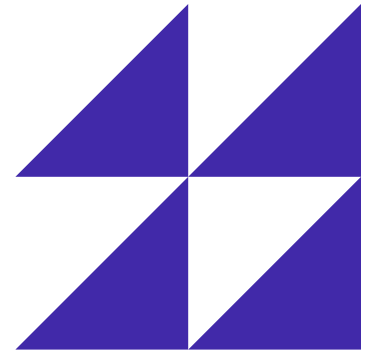
- Support community development through chapter formation, chapter reorganization, annual planning and reporting objectives.
- Assist with chapter charter renewal process.
- Review bylaws/governing documents.
- Assist with PMI tools and resources.

Region Mentors

Region mentors are experienced volunteers who provide advice, guidance and leadership to PMI chapter leaders, when needed, to develop their leadership capabilities and ensure member value delivery to build strong local chapters. Region mentors act as a resource along with PMI staff regarding policies and procedures, which enable the chapter's operational success including:

- Act as a liaison between the PMI chapter engagement department and chapter leadership to foster and strengthen relationships and enhance two-way communication.
- Encourage networking and facilitate collaboration among chapter leadership.
- Support chapter leadership in strategic, operational and transition planning.
- Provide advice, information and support to PMI staff.
- Provide advice, information and coaching to chapter leadership.
- Support community development through chapter formation, chapter reorganization, annual planning and reporting objectives.

In 2012, PMI released the first edition of the Chapter Volunteer RDS. The study defined key volunteer roles that support efficient operations of PMI chapters and was based on the collective input of our global volunteer chapter leaders. Subsequent editions have added additional information based on data collected via the Component System (CS) and Volunteer Relationship Management System (VRMS). All content, including descriptions, responsibilities and skills, result from feedback from current chapter leaders. The results of the RDS are used to develop training, content and resources in addition to providing a framework for clear and consistent information to support the recruitment and onboarding of volunteers.



2022 Chapter Volunteer RDS Methodology

Data from the CS and VRMS was analyzed to identify common chapter responsibilities and to merge descriptions.

- RDS worksheets, outlining roles and responsibilities, were provided to interested chapter leaders familiar with the role. The chapter leaders provided feedback and edits to determine the final descriptions.
- All current chapter volunteers identified via the CS were invited to participate in an RDS market research survey to validate information based on roles they currently hold or previously held.
- Updated and validated information and new branding are now included in the updated version of the RDS.

Future Role Studies

To ensure that the information remains relevant to changing conditions, the Chapter Volunteer RDS will continue to be refreshed. Functional areas and roles will be included based on frequency of use by our chapters using data collected via the CS and VRMS. Additional areas may be considered based on future needs of our chapters for the purposes of providing increased PMI support and alignment of resources to assist volunteers serving in those areas.

Access RDS Electronically

To download a pdf of this guide, visit the [Marketing Portal](#).

Key Skills

The following skills have been identified as essential to all roles:

- Communication
- Decision making
- Active listening
- Delegation
- Strategic planning and execution
- Adaptability/flexibility

New Chapter Leader Resources

Before beginning any role, all new leaders should:

- View sessions in the [Chapter Leader Orientation](#).
- Review documents in the [Chapter Leader Orientation Picks Pack](#). Users must sign in with their PMI username/password.
- Review the [Chapter Leaders' Guide: Onboarding and Transitioning](#).

Please Note: You can access all of these important resources and more on [PMInsight](#) — our single source of truth for chapter leaders.

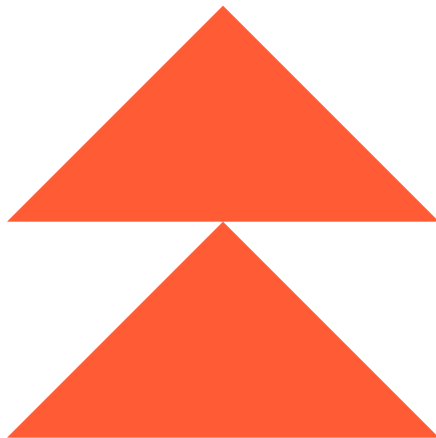
The 2022 Chapter Volunteer RDS now organizes chapter responsibilities by functional areas. The functional areas include roles and responsibilities that are important to keep in mind when structuring volunteer involvement. There are three categories of chapter roles: required, recommended and optional. Your chapter’s bylaws, specific needs and volunteer pool will determine your chapter’s specific volunteer structure.

Each role outlined in this guide includes:

- Description
- Responsibilities
- Skills

EXECUTIVE
President/CEO*
President-Elect/Vice President
Past President
ADMINISTRATION/OPERATIONS
Administration/Secretary*
Governance
FINANCE/TREASURER
Finance/Treasurer*

**Required roles that all chapters must have per PMI chapter bylaws*



MEMBERSHIP
Membership*
COMMUNICATIONS/MARKETING/SOCIAL MEDIA
Communications*
Marketing
Social Media
Publications

**Recommended roles for effective chapter operations and providing member value*

IT/TECHNOLOGY
IT/Technology
Webmaster
PROFESSIONAL DEVELOPMENT
Certification
Education
Events
Mentoring
Professional Development Champion
Programs
Sponsorship
OUTREACH
Academic and Rising Leaders
Business/Corporate
Military
Social Impact
VOLUNTEER ENGAGEMENT
Volunteer Engagement

Optional roles that should be considered based on chapter priorities, needs and volunteer pool

EXECUTIVE

PRESIDENT/CEO

DESCRIPTION:

Elected volunteer responsible for oversight of the chapter and the board. The President directs, has an overview of, and coordinates the activities of the other board members in accordance with the chapter bylaws.

RESPONSIBILITIES:

1. Mission, policy, and strategic planning

- Define the chapter's strategic goals, chapter values, vision, and mission with input and approval from the board.
- Directs the achievement of the agreed upon goals by the chapter board.
- Helps the board evaluate value to the membership.
- Keeps the board fully informed of internal and external factors influencing the chapter such as key updates to PMI's strategy, changes to government guidelines etc.
- Keeps the board and PMI apprised of the progress of the chapter's strategic plan, objectives and key performance indicators.
- Fosters establishment of strategic alliances with other entities/chapters in support of achievement of chapter goals and objectives.
- Ensures chapter functions are in alignment with PMI policies and guidelines.
- Ensure chapter bylaws and policies are regularly reviewed and updated.

2. Management and administration

- Assumes responsibility for the overall functioning of the chapter.
- Leads the chapter board in achieving the vision, mission and objectives as detailed in chapter business plans.
- Leads the chapter in ensuring the Chapter is fulfilling its primary membership services, such as providing activities for obtaining PDUs offering local educational and training opportunities, and communicating with the public and the membership regarding chapter activities.
- Presides over the board meetings in a professional and legal manner in accordance with chapter bylaws; identifying Board meeting dates, approving agendas, and presiding over meetings.

- Ensure fair practices in all chapter board decision making process.
- Ensure that the charter renewal is completed on or before the deadline set by PMI and that the chapter complies as specified by PMI.
- Legally represent the organization (can be co-dependent with another VP as determined by the board or as mentioned in the Chapter bylaws).
- Be ultimately accountable for all board operations and chapter activities.
- Ensure all Board members are aware of the PMI Code of Ethics and Professional Conduct and that Chapter business is conducted legally and ethically.
- Ensure statutory and regulatory compliance in consultation with the VP of Operations.
- Act as a general point of contact between the chapter and PMI; other members of the board would still reach out to PMI on their specific topics.

3. Members, organizations, and partners

- Prioritize membership value in all chapter activities.
- Ensure that services to members meet or exceed the targets specified in the annual plan and objectives as agreed by the chapter board.
- Engage and maintain relationships with all related parties and partners of the chapter, guiding the chapter along the journey towards its vision.
- Ensure a continual membership "pulse check" to understand member satisfaction, challenges, and remediation in collaboration with VP or Director of Membership.
- Represent the chapter at events or delegate it to the relevant proxy.
- Conduct periodic events (luncheons, round-tables with community leaders with the goal of better understanding community needs.
- Create the annual report and present it at the annual general meeting or equivalent.
- Ensures appropriate quality checks of Chapter business and operations are completed in a timely manner.

4. Leadership, Staff and Volunteers

- Demonstrate leadership within the chapter and to the community.
- Communicate with area Corporate Executives to promote the Chapter's vision and mission, and to translate area company and community needs.
- Ensure that the chapter board works together as a team to achieve chapter goals, mission, and vision.
- Ensure that volunteers are recognized for their achievements.
- Provide guidance to and encourage other chapter leaders to develop their leadership capabilities.
- Develop and implement a succession and transition plan for the chapter board.

5. Finance

- Ensures that the operation of the organization and any projects run by the chapter are financially sound and will deliver appropriate value to members.
- Work with the board and finance portfolio to ensure adequate financing is allocated to meet the needs of the short- and long-term strategy.
- Work with the finance portfolio to ensure tax compliance of the chapter.
- Work with the board to ensure prudent use and disbursement of chapter funds.
- Ensures that financial audits are completed in a timely manner.

5. Chapter

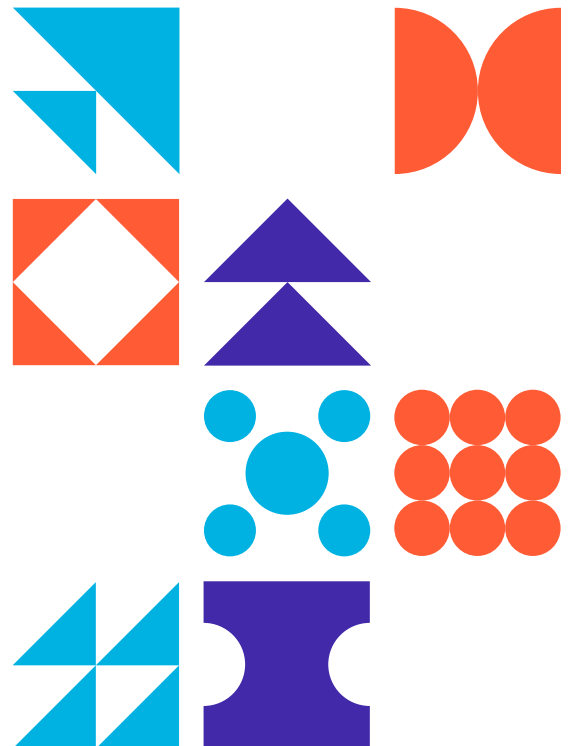
- Maintains communication with the PMI Chapter Engagement Partner, the Region 1 Mentor(s) and other regional chapter presidents.
- Represents or delegates the board's liaisons with various or partner organizations such as CBC, WSU, Chamber of Commerce, etc.
- Identify growth opportunities within the Chapter's geographic community.
- Serve as a member ex-officio with the right to vote on all committees except the Nominating Committee.

BUSINESS ACUMEN SKILLS:

- Organizational management
- PMI knowledge and experience
- Volunteer recognition and appreciation
- Forecasting/trend analysis — membership statistics, financial stability, etc.

POWER SKILLS:

- Coaching and mentoring
- Conflict resolution
- Process execution
- Team building



**Required role that all chapters must have per PMI chapter bylaws*

EXECUTIVE

EXECUTIVE VICE PRESIDENT

DESCRIPTION:

Successor to the president; elected volunteer who will assist the president with his or her duties of managing the chapter and assume the full role of the chapter president if the president is unable to perform duties for any reason.

RESPONSIBILITIES:

1. Mission, policy, and strategic planning

1. Represent the president in their absence.
2. Assume the role of president, including all areas of responsibility, if the president is unable to perform duties for any reason such as unforeseen professional/personal circumstances or resignation.
3. Assist the president in liaising with PMI as required.
4. Assist the president in all duties noted for the position of the President.
5. Assist with the the implementation of chapter's strategic projects.
6. Assist in the implementation of the succession and transition plan for the whole board – including their transition to the president role if applicable.

2. Chapter

- Maintains communication with the PMI Chapter Engagement Partner, the Region 1 Mentor(s) and other regional chapter presidents.
- Represents or delegates the board's liaisons with various or partner organizations such as CBC, WSU, Chamber of Commerce, etc.
- Identify growth opportunities within the Chapter's geographic community.
- Serve as a member ex-officio with the right to vote on all committees except the Nominating Committee.
- Post Office Box: Maintain post office box and coordinate mail delivery to Board members in a timely fashion.

BUSINESS ACUMEN SKILLS:

- Budget management
- Annual planning management
- Financial planning
- PMI knowledge and experience
- Resource Management, such as volunteer, finance and other chapter resources

POWER SKILLS:

- Team building
- Coaching and mentoring
- Conflict resolution
- Process execution
- Team building

Executive VP PROGRAMS

DESCRIPTION:

Elected or appointed volunteer responsible for the development and delivery of high-quality chapter meetings to provide members with excellent networking opportunities and learning experiences from subject-matter experts and professional peers. Works closely with the president/CEO, marketing, finance and professional development/events to provide vision and oversight to smoothly execute all program initiatives, providing quality and relevant educational programming to members.

RESPONSIBILITIES:

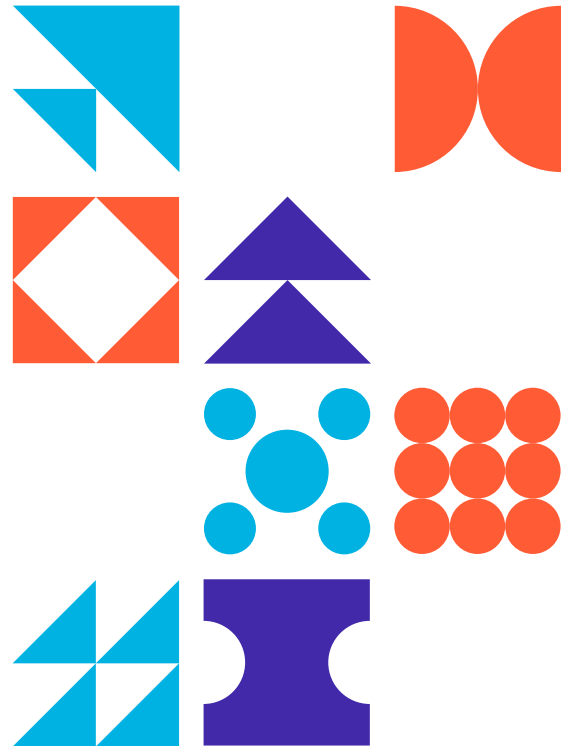
1. Actively seek out educational speakers and coordinates/collaborates with others to bring the best chapter meeting programming and speakers to the chapter membership.
2. Design chapter meeting agendas to provide networking opportunities.
3. Prepare status reports on activities and participate in board meetings.
4. Provide oversight and reconciliation assistance for all monthly meetings and submit final revenue for paid events and expenses to Finance with status reports as well as quality survey results.
5. Monitor and ensure all revenue and expenditures are in line with budgetary expectations and report any discrepancies or variations that would adversely affect the events and/or have a negative impact to the chapter.
6. Participate in the chapter budgeting process which includes working with the board to plan and forecast information associated with quality programs and events, develops budget assumptions, and prepares the annual programs budget.
7. Provide supervision to ensure development/improvements to procedure and process documentation for individual programs, events and overall program portfolio activities.
8. In collaboration with Events, identify and vet potential speakers, and schedule successful speakers for monthly membership meetings.
10. Identify opportunities to invite local guest speakers and chapter members to speak on topics of interest to the membership.
11. Maintain chapter calendar of professional development offerings.
12. In collaboration with Events, prepare program content, including presentation decks, learning materials, training outlines, and speaker biographies.
13. Ensure any required speaker forms are filled out and signed by speakers prior to the speaking engagement.
14. In collaboration with Events, manage or support the sourcing and approval of agreements related to venue and catering for professional development and chapter offerings.
15. Recruit additional volunteers to support program committees as needed.
16. In collaboration with VP-Operations, VP-Communication, Events and Technology, manage overall programming coordination: registration, PDU submittals, and any virtual set up.
17. In collaboration with Events, collect, and collate feedback from chapter events to inform and improve the development of future chapter events.
18. In collaboration with VP-Finance manage payments and financial items related to speaker and venue fees.
19. Work closely with VP-Communications and Webmaster to promote chapter programs and encourage participation.
20. Provide input regarding chapter professional development offerings.
21. Provide program budget information and monitor throughout the year to confirm adherence.
22. Responsible for needs assessment, development, implementation and evaluation of programs that contribute to the chapter long-term strategy and sustainability.
23. Support president in planning and conducting annual membership meeting, if applicable.
24. Work closely with professional development and president to select program topics and speakers, budgetary alignment, etc.
25. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Experience in programs development
- Planning and execution

POWER SKILLS:

- Ability to manage and execute change
- Innovative
- Collaborative leadership
- Detail driven
- Customer focused



IMMEDIATE PAST PRESIDENT

DESCRIPTION:

Informal role for the immediate former President/CEO or elected volunteer responsible for oversight of the chapter and the board. Note: they do not have any voting rights in the chapter board, and as this is an informal role, they can be involved in other PMI volunteer roles.

RESPONSIBILITIES:

1. Maintain continuity in the chapter to help to ensure smooth board transitions.
2. Support work within the board where needed.
3. Assume the role of mentor for the president and overall advisor for the board.
4. Provide ethical guidance to the board where needed.
5. Support conflict resolution where needed.

BUSINESS ACUMEN SKILLS:

- Diplomacy
- Human resource management
- Parliamentary procedures (i.e., *Robert's Rule of Order*)

POWER SKILLS:

- Coaching and mentoring
- Leadership abilities
- Conflict resolution
- Persuasion/motivation
- Team building
- Negotiation
- Ability to remain neutral when necessary

ADMINISTRATION/OPERATIONS

VP-OPERATIONS

DESCRIPTION:

Elected volunteer responsible for preparing, maintaining, recording and circulating all records, correspondence, meeting minutes (both board meetings and membership meetings), and related affairs of the chapter.

RESPONSIBILITIES:

1. Assure safekeeping of all governing documents (member-ratified bylaws, articles of incorporation/registration, charter agreement, board policies, committee charters, list of chapter's fixed assets, contractual agreements, and all other non-financial records for the chapter).
2. Coordinate and schedule monthly board meetings.
3. Coordinate and distribute meeting agendas.
4. Keep the records, including action items, of all business meetings of the chapter and meetings of the board.
5. Maintain all meeting minutes, with documentation in accordance with parliamentary procedures as determined by the board.
6. Coordinate the Annual Meeting notification to all members. Notice of all annual meetings shall be sent at least 30 – 45 days in advance of the meeting as outlined in the chapter's bylaws. Action at such meetings shall be limited to those agenda items contained in the notice of the meeting.
7. Coordinate with the board to develop the annual report.
8. Provide records to members and outside organizations that request information if appropriate and upon approval and request of the board, excluding personally identifiable records.
9. Provide governance and compliance notifications to the membership, directors, auditors, and members of committees as needed (i.e., elections, annual meeting, bylaws ratification).
10. Coordinate distribution of all general correspondence.

11. Provide support for membership communication.
12. Oversee coordination of printed materials (logo items, business cards, etc.) working with VP of Public Relations .
13. Collate an annual plan deliverable from each chapter leader and develop an annual plan matrix as defined by the Catalog of Core Services, track progress of the agreed deliverables and report status updates to the board and PMI.
14. Ensure chapter policies and public documents are written using inclusive language (or work with respective board members to ensure the language used is inclusive).
15. Ensure all chapter documents are saved in a shared location as determined by the board.
16. Develop and implement succession and transition plan for the role.
17. Responsible for overseeing the chapter repository and associated board files (getting the licensing of electronic tools, managing access and keeping track of document inventory).

BUSINESS ACUMEN SKILLS:

- Ability to record minutes
- Knowledge of chapter bylaws and pmi policies
- Knowledge of parliamentary meeting procedures
- Knowledge of pmi bylaws and policies
- Knowledge of records retention requirements
- Meeting coordination

POWER SKILLS:

- Excellent writing
- Time management
- Facilitation

**Required role that all chapters must have per PMI chapter bylaws*

ADMINISTRATION/OPERATIONS

VP-OPERATIONS GOVERNANCE

DESCRIPTION:

Elected or appointed volunteer with a focus on high quality and attention to detail who is responsible for the maintenance and execution of chapter policies and bylaws ensuring all required chapter governance and compliance activities are performed effectively and efficiently.

RESPONSIBILITIES:

1. Ensure the policies are consistent and compliant with all applicable governmental jurisdiction and regulations (e.g., IRS, government compliance, PMI policies, Sarbanes Oxley — local laws and regulations).
2. Coordinate the annual review of the chapter's bylaws to ensure they are operationally consistent with the chapter's current operations. If the chapter is operating in contradiction to the bylaws, coordinate the update of the bylaws and work with PMI Chapter Engagement Staff for PMI approval and to facilitate a membership ratification vote. These bylaws should be in alignment with the PMI Chapter Bylaws template.
3. Ensure and oversee roles/function definitions are consistent with the chapter's member ratified bylaws.
4. Conduct a gap analysis to identify gaps between PMI global policies and chapter policies by developing and maintaining a chapter policy manual. For example: information security/personal information policy, financial reserves policy, nominations and elections policies, board member meeting and event attendance policy.
5. Coordinate efforts to ensure the chapter's policies and bylaws are upheld and enforced by appropriate actions as determined by the board.
6. Awareness of and alignment with PMI Chapter Conflict Resolution process and tools. Ensure all Board members review the Conflict of Interest policy and sign the Conflict of Interest forms annually.
7. Raise awareness of code of conduct/regulations/processes/fairness.
8. Ensure all chapter documents are saved in a shared location as determined by the Board and shared with PMI Chapter Engagement staff via the preferred method.

9. Coordinate monthly status reporting (improve the current report format, create an executive dashboard, and provide consolidated updates to the board monthly) and ensure the chapter's shared document repository for the functional area is up to date.
10. Assist with the preparation of board meeting documentation.
11. Assist the board in creating suitable diversity, equity, and inclusion (DE&I) policy or best practices to aid PMI's commitment to DE&I.
12. Develop and implement succession and transition plan for the role.
13. Maintain Chapter historical election and officer information in an organized manner on the Chapter's website so that it is accessible to all Chapter members.

BUSINESS ACUMEN SKILLS:

- Experience with developing roles and responsibilities
- Experience with local regulations and laws
- Knowledge of PMI conflict resolution process and *PMI Code of Ethics and Professional Conduct*
- PMI knowledge and experience (i.e., Bylaws, policy manual for PMI chapters, etc.)
- Policy development experience

POWER SKILLS:

- Conflict resolution
- Excellent writing
- Facilitation
- Executive leadership

VP-FINANCE

DESCRIPTION:

Elected volunteer responsible for managing financial operations, maintaining and presenting all financial records required for chapter operations in accordance with chapter bylaws, local legislation* requirements and the *PMI Code of Ethics and Professional Conduct*.

RESPONSIBILITIES:

1. Manage accounts receivable and payable and all financial portfolio activities, including but not limited to the collection of chapter dues from PMI, payments for chapter meetings or special events and the payment of all chapter bills in accordance with the chapter board of directors.
2. Maintain the Chapter cash box and ensure accessible at all chapter meetings and events.
3. Establish and maintain all required chapter bank accounts and/or similar financial transactions; arrange for officer signatures and/or approval as required.
4. Provide financial reporting regarding the state of financial assets and chapter activity to chapter membership and board of directors.
5. Prepare the annual financial statements, reports and any other mandatory financial documentation required by local legislation* and liaise with a dedicated financial/tax consultant, as needed.
6. Maintain the annual budget: assist each chapter functional area in creating their respective budgets aligned with the annual plan based upon their desired services/programs prior to the beginning of the fiscal year (January – December), tracking and monitoring of expenditures, reporting spending and available funding for each functional area and assisting in procurement services and pricing.
7. Open and close accounts as deemed necessary for the management of chapter funds with approval from the chapter board of directors.
8. Assist with the annual planning by providing relevant budget and financial information.
8. Assist with and contribute to the budget planning and goal setting, investing, and forecasting for the upcoming years, both short term (1 year) and long term (next 2 to 3 years).
9. Track accounting and spending monthly, annually and by chapter event for accurate record-keeping.
10. Assist chapter president/vice president in completing financial session on charter renewal on-line form and provide PMI with financial documentation necessary for chapter's annual charter renewal process.
11. Prepare financial guidelines and procedures for the chapter along with board.
12. Maintain and ensure compliance with all financial operational processes to ensure continuity of chapter operations and define, document and maintain chapter policies including financial reserve policies, investment policies, and record retention and destruction policies established by the board of directors.
13. Ensure the chapter has reviewed and submitted required tax filings and/or government required payments.
14. Financial Audits: Recommend and secure auditors to review Chapter financial records and policies
15. Investments: Inform the Board of financial investments opportunities supporting the Chapter's long-range and short-term strategic objectives.
16. Review all chapter contracts and maintain copies in Board accessible files.
17. Recommend improvements in the financial processes to the board.
18. Keep an up-to-date inventory of all of the financial and physical assets of the chapter.
19. Serve as liaison with PMI on financial matters.
20. Complete a cost-benefit analysis of all activities proposed by the board of directors.
21. Review any chapter contract, agreement and insurance and ensure the most current and past copies are maintained in Board accessible files
22. Review and provide reconciled bank accounts monthly.
23. Develop and implement succession and transition plan for the role.

**Local legislation might be state, commonwealth, country, or another jurisdiction*

VP-MEMBERSHIP

DESCRIPTION:

While the focus on membership is that of the entire board, this elected or appointed volunteer is responsible for addressing the needs of chapter membership, including membership recruitment, retention, and associated value delivery in accordance with chapter policies and bylaws.

RESPONSIBILITIES:

1. Develop and Implement a Chapter Membership Plan

- Ensure continued growth through inclusive recruiting, retention, and member engagement, including the establishment of measurable goals and the monitoring of success metrics for appropriate action using membership data and membership feedback.
- Develop and implement a plan to recognize member milestones (such as anniversaries or awards).
- Develop, maintain, and implement a membership retention program.
- Create and circulate a “new member packet” with information about local chapter

2. Customer Service

- Answer general member/nonmember information inquiries and other requests for assistance with membership and its benefits.
- Support and attend annual general meeting and all chapter meetings as appropriate.
- Communicate Membership Renewal Date Approaching, Missed Renewals, and Welcome emails to new chapter members and thank you emails for renewal.

3. Data

- Serve as primary user of ThoughtSpot for analysis and reporting of membership data.
- Maintain the membership records of the chapter
- Provide communication list/member updates to officers in accordance with board-approved goals and privacy laws and chapter policies.
- Coordinate the production and distribution of timely membership reports, such as monthly membership reports by demographics (city, state, age, industry, certification holders, etc.).

4. Market Research

- Review and analyze member satisfaction survey data and enhance membership benefits.
- Analyze and integrate survey feedback for inclusion in the annual planning.
- Develop and administer current and prospect/lapsed (non renewal) member surveys (satisfaction and other).
- Conduct research on surrounding industries, non-profits, educational institutions, and employers for potential membership increase growth opportunities

5. Marketing and Member Engagement:

- Promote the value of PMI and chapter membership.
- Develop and implement membership welcome and support plan including the promotion of PMI and chapter membership value (to include welcome letter, renewal letter, orientation, and more).
- Communicate member value through various delivery methods in alignment with the Membership Benefits Package. Utilize membership marketing materials available through the PMI Marketing Portal.
- Coordinates with VP Communications and VP Public Relations on all membership messaging
- Invite and add new chapter members to chapter communication channels (WhatsApp, LinkedIn, Facebook, etc.).
- Consider multilingual options for non native or multicultural locations.
- Develop and implement succession and transition plans for the role.

BUSINESS ACUMEN SKILLS:

- Data analysis and reporting
- Marketing
- Proficiency in using survey tools/market research/demographic research
- Proficiency in using PMI ThoughtSpot

POWER SKILLS:

- Persuasion/motivation
- Public speaking/presentation

**Recommended role for effective chapter operations and providing member value*

VP-MEMBERSHIP /MILITARY OUTREACH

DESCRIPTION:

A volunteer responsible for serving as a liaison between the local PMI chapter board, members, and the local military, as well as a resource to military personnel interested in PMI for Q&A, membership benefits, as well as certification support, networking, mentorship, and career connectivity. (At this time, these efforts are focused on chapters in the United States only.)

RESPONSIBILITIES:

1. Notify PMI chapter engagement partner that the chapter has an active military program.
2. Attend military liaison calls monthly or every other month with PMI staff.
3. In accordance with chapter policies, budget, and procedures, provide local chapter marketing assistance for meetings and membership recruiting efforts. Examples include:
 - Create and circulate a “new member packet” with information about local chapter community involvement, military discounts and benefits as well as introducing the local chapter PMI board.
 - Staff a booth at a chapter event, if needed.
4. Present a PMI challenge coin to military/veteran members who earn a certification.
5. Enhance efforts to maximize new memberships and renewals, including membership drives and on-site military brown bag luncheons or meetings.
6. Promote membership benefits of PMI to local military leaders, veteran groups, and military installations.
7. Work with other volunteers to promote awareness and assess the program’s strengths and weaknesses.
8. Communicate military liaison efforts and measurements through PMI global resources.
9. Support PMI and other military liaisons to assist in knowledge sharing and lessons learned.
10. Establish relationships with local community, military installation, veteran service organizations, and/or universities in support of hiring/training military in transition.
11. Conduct periodic surveys with military members and veterans to determine their satisfaction with the program and obtain feedback to improve the program.
12. Assist Military Affairs Program participants as they prepare their final reports.
13. Provide periodic reports to the chapter partner and Board of Directors regarding the Military Affairs Program.
14. Create an event and marketing item budget for Board of Directors review and approval.
15. Create, update and maintain Military Affairs Program contact list.
16. Attend a majority of chapter meetings and attend strategic planning sessions.
17. Write contributions for chapter website, newsletters, and annual reports to membership.
18. Provide networking and educational opportunities for local veterans and active-duty personnel interested in project management.
19. Develop and implement succession and transition plan for the role to better sustain program.

BUSINESS ACUMEN SKILLS:

- Active duty, retired or honorable discharge from U.S. military (preferred)
- Military or veteran spouse
- Love and appreciation for the military and veteran community
- Willing to become the subject matter expert and mentor (ideal for chapters that do not have any military/veteran members)
- Familiarity with survey tools and construction to ensure useful data and collection

POWER SKILLS:

- Organization
- Marketing
- Computer, internet, and email access essential
- Ability to work with others to achieve consensus
- Networking
- Public speaking/presentation
- Knowledge of existing military installations and community in the area

VP- COMMUNICATIONS

DESCRIPTION:

Elected or appointed volunteer responsible for strategic management and coordination of communication channels in accordance with chapter policies and bylaws. May coordinate/ collaborate with other volunteers responsible for executing communications plans.

RESPONSIBILITIES:

1. Strategy and Planning

- Define and regularly update chapter communication and social media strategy, crisis communications plan, policies, goals, and objectives.
- Maintain a communications and social media schedule that details all chapter communications across all channels including chapter membership and other external audiences; supervise and support all communication channel activities of the chapter.
- Balance the need for timely communication with the goal to keep communication concise, timely and appropriate.
- Develop and implement succession and transition plan for the role.

2. Execution

- Perform and uphold duties, as specified by the chapter bylaws, board policies and procedures.
- Submit planned chapter events to PMI's Event Calendar form to be shared with a broader audience: <https://www.pmi.org/events/calendar/posting-policy-form>.
- Execute communications and social media plans/ calendars, communicating in a timely manner with chapter members and the greater community.
- Support chapter events with communication planning and execution.
- Gain access to PMI's Marketing Portal and review regularly to identify useful PMI-provided communication resources.
- Maintain event registration on the Chapter website
- Manage and maintain up-to-date Chapter website content.
- Create or obtain tools that facilitate the usability of the Chapter website for the Board, members, and guests
- Maintain coordination with VP Operations when major changes to the web site needed (e.g., changing menus, changing navigation)

3. Collaboration

- Collaborate with other chapter volunteers responsible for Public Relations, Web/Technology, and Finance to ensure alignment and consistency for chapter members.
- Manage the chapter's approved communications budget, in cooperation with VP of Finance.
- Consult and collaborate with all members of the board to coordinate the communication needs of the chapter and chapter announcements
- Coordinate with VP Public Relations regarding external communications on all media.
- Publish and distribute timely Chapter announcements such as email blasts, newsletters, Annual Reports, and other such publications on a timely basis
- Generate new ideas on how to communicate with members and guests
- Develop and maintain content and communication associated with social media tools in coordination with the Director of Social Media

BUSINESS ACUMEN SKILLS:

- Experience in developing communications strategy and supporting communication plans
- Knowledge of PMI global and chapter brand guidelines
- Strong knowledge of common communication vehicles (i.e., Newsletters, annual plans, email communications, etc.)

POWER SKILLS:

- Excellent writing
- Public speaking/presentation
- Technical tools
- Team building
- Knowledge of social media platforms

**Recommended role for effective chapter operations and providing member value*

VP-MARKETING and PUBLIC RELATIONS

DESCRIPTION:

Elected or appointed volunteer responsible for chapter-based marketing activities to increase awareness of both the chapter and the PMI brand within the territory. The volunteer will develop and execute an integrated marketing program to support member acquisition, member retention, event promotion, outreach activities, sponsorships, and other related activities in alignment with the chapter's strategic objectives and PMI's messaging. These activities shall be performed in accordance with chapter bylaws and PMI policies, brand guidelines and global marketing strategy.

RESPONSIBILITIES:

1. Strategy and Planning

- Develop and implement an integrated marketing program aligned with the chapter's strategic objectives.
- Monitor, optimize and analyze all marketing activities according to defined KPIs.
- Develop and implement succession and transition plan for the role.

2. Execution

- Ensure brand consistency within the chapter to PMI's brand positioning by reviewing chapter website, communications and marketing materials.
- Gain access to PMI's Marketing Portal and review regularly to identify useful PMI-provided marketing resources.
- Work with local vendors to develop marketing materials in accordance with PMI brand guidelines, if suitable materials are not available in the Marketing Portal.
- Monitor and coordinate branded presentations and messaging to external stakeholders and other organizations interested in PMI products and services.

- Coordinate and organize presentations to chapter members, for use at chapter events and other opportunities.
- Maintain relationships with existing sponsors for continued revenue generation to fund the chapter's activities and events.
- Support the events teams with brand and PMI messaging to ensure consistency across the chapters' representation.
- Plan and purchase print and digital advertising and coordinate with communications and social media.

3. Collaboration

- Create and execute annual marketing plan with detailed activity calendar including but not limited to messaging, email, advertising (and sponsorship), events, web updates, newsletters, social media content, goals and KPIs.
- Collaborate with local businesses and academic institutions, where appropriate, to publicize the chapter and PMI.
- Use best practices in marketing to promote the chapter and its activities to members and the community at large.

BUSINESS ACUMEN SKILLS:

- Proficiency with, or desire to learn digital marketing tools, including email marketing platforms, social media platforms, web content management systems, research/surveys
- Understanding of marketing strategy, tactics, planning and delivery
- Working knowledge of best practices in marketing

POWER SKILLS:

- Public speaking/presentation
- Persuasion/motivation
- Ability and desire to stay informed of evolving marketing trends and resources

COMMUNICATIONS/MARKETING/SOCIAL MEDIA

VP-PUBLIC RELATIONS / PUBLICATIONS

DESCRIPTION:

Elected or appointed volunteer responsible for chapter publications to deliver news and increase awareness of chapter activities in the local community, as well as the global project management community. The volunteer will produce and distribute all chapter publications to members, potential members, and external sources with the objective of enhancing the member experience and expanding awareness of both the chapter and PMI.

RESPONSIBILITIES:

1. Strategy and Planning:

- Manage the chapter's Publication and Communication Plan which includes the chapter's publications, newsletters and press announcements.
- Create a regular cadence for chapter updates in relevant outlets.
- Conduct testing and data analysis to identify issues and opportunities to improve and expand the reach and stakeholder engagement of the e-newsletter.
- Develop and implement succession and transition plan for the role.

2. Execution:

- Create regular chapter updates of chapter events, programs or any news announcement update as and when requested.
- Coordinate with VP of Communications to develop promotional content for events such as chapter meetings and programs and post to chapter outlets. This includes writing articles, taking pictures, or getting photos from the chapter photographer and updating the chapter website.
- Coordinate with the VP of Communications to submit publication material to PMI events calendar and local community publications, as appropriate, to promote chapter activities.
- Distribute the chapter meeting announcements, flyers, annual report and financial statement to chapter membership to routinely updated email distribution lists.

- Assist with the development, writing, and editing of online content.
- Assist with the development, writing and editing of marketing/promotional content.
- Implement special projects as assigned.
- Perform general proofreading and editing as needed.

3. Collaboration:

- Solicit publication content from chapter members.
- Liaise with portfolio directors to gather the event updates and photographs.
- Solicit articles and other input from chapter members for publishing.
- Liaise with chapter team members to ensure that relevant news is posted on the chapter's website.

BUSINESS ACUMEN SKILLS:

- Experience in content production
- Experience in copywriting and editing
- Working knowledge of MS Office; photo and video editing software is an asset
- Organizational
- Planning and execution
- Print press knowledge/understanding
- Written/multilingual expertise
- Audience/membership understanding

POWER SKILLS:

- Ability to identify audiences and determine strategies for effective communication
- Ability to work in a team environment

VP-PROFESSIONAL DEVELOPMENT/EDUCATION

DESCRIPTION:

Elected or appointed volunteer responsible for creating and managing professional development and education programs in accordance with chapter policies and bylaws. Responsible for the development of chapter education activities which include but are not limited to the preparation and maintenance of PMI's certifications, as well as the development and sustainability of relationships with local colleges, universities and other external partners such as Authorized Training Partners (ATPs).

RESPONSIBILITIES:

1. Develops and implements a chapter professional development plan, including a program roadmap for professional development content programs.
2. Coordinates chapter's external educational activities, such as study groups, seminars, workshops, courses, professional development days and other educational activities.
3. Provides information and guidance to members and nonmembers on PMI certification/re-certification.
4. Incorporates feedback, suggestions, and recommendations as necessary to enhance effectiveness and value delivery to the audience regarding the contents of programs.
5. Works with marketing to promote the education and certification programs, as well as training opportunities offered by the chapter or those in partnership with ATPs.
6. Recommends, develops and delivers project management education materials, courses, presentations and sessions including leadership development training programs in partnership with ATPs.
7. Seeks new project management professional development programs and services through networking with other educational organizations and PMI chapters.

8. Promotes the project management profession through the planning and coordination of special events, as identified by the chapter board, designed to enhance and expand the skills and knowledge of project managers.
9. Invites key influencers from various industries to participate in chapter events.
10. Assists and performs recruiting and selection of personnel to carry out educational group activities at the chapter.
11. Negotiates and/or approves agreements between the chapter and related external partners.
12. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Ability to develop and manage programs and event schedules
- Content and curriculum development
- Knowledge of PMI credentials and PDU program
- Event planning

POWER SKILLS:

- Coaching and mentoring
- Public speaking/presentation
- Team building

CERTIFICATION

DESCRIPTION:

Elected or appointed volunteer responsible for promoting PMI's project management certifications amongst chapter members and the project management community in the chapter's territory, as well as leading the chapter initiatives focused on organizing and leading the chapter's certification programs (e.g., study groups) for PMI certifications. Additionally, responsible for supporting the planning, research and operational execution of the various preparation courses and examinations leading to PMI certifications and establishing and maintaining the relationship between the chapter and authorized training partners (ATPs) and other exam prep partners.

RESPONSIBILITIES:

1. Manage the relationship between the chapter and external partners (i.e., ATPs) in providing certification exam prep courses.
2. Organize and ensure successful execution of the exam prep courses that can be provided by non-ATPs.
3. Work with the relevant teams to publish certification courses and any further details on the chapter website in a timely manner.
4. Work with communications team to create the communication schedule to promote PMI certification courses and certification updates in the chapter communications.
5. Facilitate requests from members and organizations for additional information, chapter involvement and participation in PMI initiatives related to certification.
6. Participate in other education events and programs.
7. Engage chapter volunteers in certification-related events and programs.
8. Attend chapter meetings and events.
9. Support the development and implement specific tactics of the chapter's strategic plan.
10. Prepare registration and training materials for prep courses not provided by an ATP.
11. Encourage chapter members to direct questions related to the application completion process of PMI to Customer Care.
12. Support the chapter marketing team in creating certification-related marketing materials.
14. Support chapter members who are credential holders on issues regarding professional development units (PDUs) reporting.
15. Recommend and encourage participation of chapter members who are credential holders in internal/external activities that count as PDUs for certification in order to remain in good standing.
16. Work with communications team to provide reminders for credential holders about certification expiration, suspension and missing PDUs.
17. Prepare documents, communication worksheets and agendas for review and presentation when needed.
18. Prepare for meetings related to certification when needed.
19. Respond to email inquiries regarding certification which include (but are not limited to):
 - a. Updates on PMI certification programs material, processes, exams, etc.
 - b. Training and certification portfolio.
20. Maintain a library of standard responses to frequently asked questions (FAQs) regarding exam prep courses and certifications.
21. Encourage members to look up PMI certifications-related information on PMI.org website.
22. Follow up on outstanding issues related to PMI certifications.
23. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Broad knowledge of PMI certification framework and CCR program
- Program development
- Planning and execution

POWER SKILLS:

- Ability to manage and execute change
- Innovative
- Collaborative leadership
- Detail driven
- Customer focused
- Ability to work with people from different backgrounds and cultures

PROFESSIONAL DEVELOPMENT CHAMPION

DESCRIPTION:

In accordance with chapter policies and bylaws, the appointed volunteer serves as a subject matter expert (SME) to help chapter members/nonmembers understand PMI product offerings that aid in career development.

RESPONSIBILITIES:

1. Organize and support presentation sessions about those PMI products determined as priorities by the chapter board and in the best interest of the community.
2. Leverage and customize product collateral and marketing assets provided by PMI Global Headquarters for providing awareness to the chapter and local community.
3. Ensure product-user feedback regarding PMI products is communicated via the appropriate channels.
4. Provide thought leadership into PMI products and offerings within the associated region, as requested.
5. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Product knowledge/awareness
- Career guidance

POWER SKILLS:

- Interpersonal
- Public speaking/presentation
- Proactive approach

Director of IT/ TECHNOLOGY

DESCRIPTION:

Elected or appointed volunteer responsible for all aspects of chapter technology including the acquisition of technology, support/maintenance of technology, data analytics, technology governance and long-range and annual planning of technology in accordance with any current or future PMI procedures and guidelines. The volunteer will be responsible for working with chapter leaders and vendors to ensure alignment with the business needs of the chapter as well as ensure compliance with chapter and PMI Information Security Policies. In addition, the volunteer will drive the technological vision and strategy, to successfully deliver and implement technology solutions to meet the chapter's needs.

RESPONSIBILITIES:

1. Acquisition of Technology

- Participate in the request for proposal (RFP) and contract negotiations (not sole negotiator).
- Research new technologies and/or features to improve the chapter efficiencies and membership experience and report on feasibility of proposed technology initiatives.
- Collaborate with chapter leadership to propose initiatives.
- Gather business requirements.
- Oversee any initiatives for proposed technologies.
- Lead implementation planning.

2. Support/Maintenance of Technology

- Provide administrative support for chapter technologies.
- Be familiar with all aspects of operational technologies in place and be able to provide backup administrative support.
- Ensure the chapter's owned, rented, or leased equipment is in good working order and tracked.
- Provide regular technology status updates to chapter leaders and board members.

- Communicate service level agreements (SLAs) for issue/request intake process.
- Manage, recruit and onboard internal and external technology volunteers and ensure providing timely responses to support requests.
- Regarding data reporting operations and analytics, partner with membership and governance teams where appropriate. Per PMI current and future membership and data protection policies, provide general data support including, but not limited to, gathering, and providing data.
- Per PMI current and future membership and data protection policies, create awareness of available data and the value proposition of reporting.
- Provide various analytic reports to chapter leaders including:
 - Referral source
 - Email conversion
 - A/B testing web analytics
 - System reports: operational defects in IT systems

3. Governance

- Maintain data and transaction services and processes.
- Maintain inventory of technologies in place, including administrative access information.
- Ensure compliance with all software/subscription licenses that are acquired.
- Ensure backups and ensure proper archiving occurs within the infrastructure.
- Maintain the process and methods for access rights for chapter systems. Assess risk in IT systems. Partner with governance team where appropriate.
- Ensure compliance with chapter and PMI information security policies. Partner with governance team where appropriate.
- Develop and implement succession and transition plan for the role.

4. Technology Operations

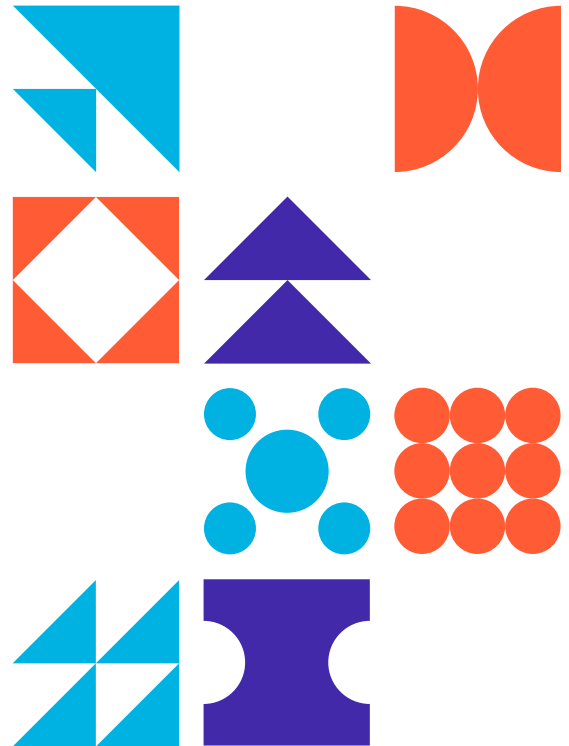
- Successfully plan, track and deliver all IT-related services employed to benefit the chapter.
- Work with other technology team members, chapter board members and volunteers to identify opportunities to improve chapter technology and infrastructure.
- Provide submission requests for budget and schedule estimates Provide recommendations for system upgrades.
- Assist in defining business capabilities.
- Identify upcoming technology needs based on chapter plans/activities.
- Identify road maps focused on sequencing and dependencies.
- Keep current on technologies being adapted by PMI or other PMI chapters.
- Ensure member, nonmember, and vendor information security. Partner with governance team where appropriate.
- Perform application monitoring.

BUSINESS ACUMEN SKILLS:

- Contract and vendor management
- Data analysis and reporting
- Organizational change management
- Management
- Technical application

POWER SKILLS:

- Stakeholder engagement



WEBMASTER

DESCRIPTION:

Appointed volunteer that serves as the primary contact for all aspects of the chapter's website, handling a range of responsibilities that includes web design and development, routine site and content maintenance, and various updates to ensure website aligns with the strategic communication and marketing goals and objectives of the chapter.

RESPONSIBILITIES:

1. Serve as the primary contact for all aspects of the chapter's website.
2. Collaborate with other board members or designer to publish content for communication on the website.
3. Add or update web page sections upon request from chapter board members.
4. Develop and maintain internet and intranet portals, forms, and structures in accordance with chapter's needs.
5. Develop, implement and maintain e-commerce applications.
6. Encourage and facilitate consistent, creative and unified web design.
7. Collect and analyze web analytics and similar data; identify opportunities to improve search engine optimization (SEO), time on site, web traffic, and other relevant metrics.
8. Maintain and document ownership of chapter internet domain.
9. Assist other chapter volunteers with use of company websites through one-on-one support, user guides and training sessions.
10. Ensure compliance with chapter web and information security policies, as well as the PMI Information Security Policy, ethical standards, software licenses, and applicable state and federal laws.
11. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Organizational change management
- Strong analytical, troubleshooting, and problem-solving skills.
- Technical application
- Website software
- Web design and layout
- Analytics

POWER SKILLS:

- Stakeholder engagement
- Collaborative leadership
- Business process analysis

Director of SOCIAL MEDIA

DESCRIPTION:

Appointed volunteer responsible for strategizing, implementing, optimizing, moderating and maintaining social media channels for the chapter in line with the chapter's social media policy and PMI Social Media Guidelines and brand standards for chapters.

Responsible for the overarching strategy and goals associated with the chapter's social media channels, which may include identifying and testing new social platforms, evaluating current social channels, raising awareness of the chapter, knowledge sharing, highlighting chapter members, showcasing events, etc. Focus on fostering a two-way communication platform between the chapter and members while creating an engaged online community.

RESPONSIBILITIES:

1. Strategy and Planning

- Develop or periodically review and update the chapter's social media strategy and policies as needed.
- Create a social media calendar/plan for consistent sharing of relevant content and information.
- Stay abreast of social media trends and technology, advising the chapter if and how to leverage them.
- Periodically review social media assets provided through PMI's Marketing Portal.
- Develop and implement succession and transition plan for the role.

2. Execution

- Create and manage social media campaigns tailored to the specific needs of the chapter.
- Curate content, finding and sharing information of interest to the chapter's audience while respecting copyright laws.
- Create content as necessary, including posts, tweets, pins, images, infographics, videos, graphics.
- Maintain consistent interaction with followers by responding to social media comments in a professional and timely manner.

- Oversee all chapter social media accounts ensuring regular posting of relevant and interesting content.
- Ensure compliance with PMI's Social Media Guidelines and brand standards for chapters.
- Utilize toolkits provided by PMI's social media team in the Marketing Portal to amplify awareness of products and services available to members.
- Manage efforts in building online reviews and reputation. Monitor online reviews and respond to each review.
- Analyze key performance of social media channels to identify what is working well and areas for improvement.
- Elevate the profile of the project management profession by disseminating PMI's thought leadership and research to a regional audience.

3. Collaboration

- Work with chapter committees to identify and maximize opportunities for sharing information and interacting with followers.
- Advise on the best way to integrate social media in the chapter's website, marketing campaigns and content publishing.
- Work closely with e-marketing colleagues to create a cohesive plan for creating awareness of chapter activities.

BUSINESS ACUMEN SKILLS:

- Basic understanding of current trends in social media technology and applications
- Basic understanding or desire to learn/utilize social media management tools (for example: Hootsuite, Sprinklr, Sprout, etc.)
- Basic understanding of social media terms and metrics
- General understanding of social media apps such as Facebook, Twitter, and LinkedIn
- Online Community moderation ability
- Flexibility to learn newer platforms/solutions

POWER SKILLS:

- Excellent writing
- Technical tools

OUTREACH

SOCIAL IMPACT OUTREACH

DESCRIPTION:

Appointed volunteer responsible for creating outreach opportunities for chapter members passionate about serving the community through the teaching of project management skills and experiences. Identify and promote social good partners, projects, activities, and tasks for chapter members and volunteers to be involved in.

RESPONSIBILITIES:

1. Raise awareness of project management and deliver member value through the promotion/advocacy of chapter social impact activities.
2. Use PMI resources to support social impact initiatives in the local community.
3. Offer opportunities to chapter volunteers for developing their skills and participating in the community through social impact activities.
4. Create a team of chapter volunteers to address the multiple segments of social outreach based on chapter size and need.
5. Promote chapter and PMI global social impact initiatives through different channels (press, social media, etc.) to increase visibility among chapter members and local community and provide reports on their engagement.
6. Work with the chapter president and board to increase awareness as well as member participation in social impact projects through chapter member communications.
7. Document outreach best practices for repeatable outreach activities.
8. Recruit and onboard new social impact outreach volunteers through PMI's volunteer relationship management system. This will ensure that all volunteers receive a certificate of recognition at the end of the service year.
9. Provide monthly outreach outcome updates to the chapter president, chapter board members, and PMI staff upon request.
10. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Knowledge of organizing people around a community focused cause
- Knowledge of outreach process and engaging external organizations' staff to receive PMI training at no cost
- High degree of record keeping skills and documenting best practices
- Able to deliver online and in person training

POWER SKILLS:

- Leadership abilities
- Social media savvy
- Organization
- Curriculum and/or training development
- People and purpose focused

Director of MENTORING

DESCRIPTION:

Elected or appointed volunteer responsible for leading, planning, conducting, and overseeing the chapter's mentoring program. Creates and delivers the mentoring program annual schedule, coordinates budget and resources (including recruitment of mentors, call for mentees, topic selection, administrators, venues, mentor-mentee matching, follow-up, scheduling, feedback, and continuous program improvement to ensure the smooth running of the mentoring program.

RESPONSIBILITIES:

1. Create a new mentoring program, if needed, and/or coordinate the existing one, managing the activities of mentor/mentee pairs from beginning to end to nurture a successful experience.
2. Develop and maintain process & procedures documentation relating to the mentorship program.
3. Work with the marketing team to promote mentoring programs at PMI chapter meetings, events and the chapter media channels as appropriate.
4. Work with the webmaster to put content on the chapter website (application forms and content).
5. Create and coordinate annual kickoff meeting with the professional development director in alignment with the approved chapter budget (i.e., cost, location, invitations).
6. Create and conduct the program kickoff presentation to recruited mentors/mentees.
7. Recruit and lead volunteers to support the program based on their assignment (registration, customer care, venue setup, etc.), keeping them engaged and motivated.
8. Match and monitor mentors and mentees based on established premises.
9. Facilitate the introduction of the corresponding mentor-mentee pairs.
10. Define mentee capacity of each mentor (usually 1 – 2).
11. Collect statement of understanding from each mentor/mentee pair.
12. Touch base with mentors/mentees on a regular basis, as appropriate, for status updates.
13. Communicate expectations/responsibilities to mentors/mentees.
14. Collect and maintain documentation (i.e., resumes, applications, contact information) from mentors/mentees.
15. Develop, provide and maintain training for each of the intakes.
16. Validate content updates for each program.
17. Seek and engage new mentors/mentees.
18. Maintain a database of mentors for the program.
19. Mentor several mentees of your own (usually 1 – 2).
20. Gather and act on feedback regarding the mentorship program.
21. Provide status reports and other communication periodically. Maintain budget for specific area of responsibility.
22. Partner with relevant chapter stakeholders to support and improve the program and its processes.
23. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Program development
- Planning and execution

POWER SKILLS:

- Ability to manage and execute change
- Innovative
- Collaborative leadership
- Detailed orientated
- Customer focused

OUTREACH

Director of CORPORATE AMBASSADORS / BUSINESS OUTREACH

DESCRIPTION:

Elected or appointed volunteer responsible for developing relationships within the local business community to promote adoption of project management practices, the project management profession, and the chapter.

RESPONSIBILITIES:

1. Identify and build relationships with businesses in the chapter's local area to engage with and maintain a record of contacts.
2. Use ThoughtSpot membership data and other sources to identify potential business contacts.
3. Learn what the chapter is or is not providing to identified organizations.
4. Create the value proposition for why a business would engage with the chapter.
5. Establish internal processes to sustain business relationships.
6. Investigate usage of CRM or other tools to capture business contact information.
7. Work with other functional areas such as professional development to provide value to the business outreach members.
8. Develop an overall strategy that supports the overall strategies of the chapter and PMI.
9. Develop goals/objectives to measure success and maintain corporate outreach budget.
10. Conceive and implement innovative programs to support corporate outreach strategies.
11. Evaluate and maintain existing corporate outreach programs and partnerships or monitor activities of outreach volunteers assigned to manage the program.
12. Research and utilize PMI materials to support designated outreach activities.
13. Work with volunteer engagement to recruit and onboard any corporate outreach team members.
14. Establish relationships with professional organizations already engaged with corporations identified as potential engagement partners.
15. Represent the chapter to area corporations to develop partnerships and expand the practice of project/program/portfolio management that will add value and benefits.
16. Once the corporate partners have been identified, create and execute the agreed upon initiatives.
17. Establish and maintain relationships with appropriate groups/individuals within potential partnership corporations.
18. Provide leadership for corporate outreach events and lead the corporate outreach team in these areas.
19. Provide timely, open communications and updates on activities to leadership.
20. Contribute to a knowledge base for presentations, templates, images, etc., that can be referenced and repurposed for all Outreach programs.
21. Work with chapter leadership to promote outreach activities.
22. Explore opportunities for corporate outreach partners to make presentations at the chapter breakfast roundtable, career development network meetings, or to host outreach events and collaborate on projects that benefit the community.
23. Once a new relationship is established at an organization, introduce PMI's business development lead (bdl) when necessary.
24. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Leadership abilities
- Influence
- Context and situational awareness
- Public speaking/presentation
- Relationship building

POWER SKILLS:

- Time management
- Productivity
- Critical thinking
- Problem solving
- Teamwork
- Emotional intelligence
- Organization

SPONSORSHIP

DESCRIPTION:

Elected or appointed volunteer who develops and executes an integrated sponsorship program to support chapter events, outreach activities, and other related activities in alignment with the chapter's strategic objectives. These activities shall be performed in accordance with chapter bylaws, PMI policies, and chapter annual plan.

RESPONSIBILITIES:

1. Create and execute annual sponsorship plan with detailed activity calendar including email, social media, advertising, events, press releases, web updates, etc. Chapters do not need to promote their sponsorship plan in social media or any other channels – only the successful outcomes of that outreach.
2. Work with the marketing and communications portfolios to promote the chapter and its activities to potential sponsors and partners in the community.
3. Liaise with the communications portfolio to plan and purchase print and digital advertising, if applicable.
4. Monitor, optimize, and analyze all sponsorship and public relations activities with the help of other chapter portfolios.
5. Collaborate with local businesses and academic institutions, where appropriate, to be an advocate of PMI and the chapter.
6. Maintain relationships with existing sponsors for continued revenue generation to fund the chapter's activities.
7. Build team to collaborate with sponsors and partners.
8. Maintain coherence between chapter's sponsorship plan and finance strategy.
9. Collaborate with outreach team to understand potential corporate sponsors.
10. Coordinate and organize presentations to potential chapter sponsors, event sponsors and other sponsors.
11. Provide reports to the board on sponsorship statuses on a regular basis (TBD by the chapter board).
12. Ensure final sponsorships related to benefit generation to chapter members are duly communicated in social media, mailing, newsletters, chapter website, etc.
13. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Nurture long-lasting relationships with external stakeholders
- Knowledge of chapter event schedule
- Ability to connect the right stakeholders to the right resources within chapter
- Experience in writing, interpreting, and evaluating contracts/MOUs effectively

POWER SKILLS:

- Coaching and mentoring
- Public speaking/presentation
- Team building
- Collaborative leadership
- Detail driven
- Customer focused

Director of ACADEMIC OUTREACH

DESCRIPTION:

Elected or appointed volunteer responsible for academic outreach targeting students aged 19-35, faculty, and the academic project management communities and related areas of study. Responsible for developing a strategy and implementing programs that form sustainable partnerships and yield mutual benefits for tertiary/higher educational institutions that align with PMI's impact strategy.

This role primarily focuses on outreach to rising leaders, defined as students and early career professionals aged 19-35.

RESPONSIBILITIES:

1. Awareness

- Provide information, guidance and recommendations to members as necessary to enhance effectiveness and value delivered to the audience and chapter regarding the contents of programs aimed at faculty, researchers and students.
- Identify potential partnerships with academic institutions and pursue relationship building with faculty members in project management disciplines and related areas.
- Promote awareness of the chapter, PMI, the Global Accreditation Center (GAC), the project management profession, the benefits of chapter support, group student membership and PMI products/programs/initiatives relevant to an academic audience.

2. Strategy

- Engage university students by developing and implementing innovative programs to support academic outreach strategies, such as PMI chapter student clubs, mentorship, case competitions and networking.
- Provide feedback from students and faculty and be the voice of students and academic outreach to the chapter board.

3. Activities

- Maintain a record of local academic contacts.
- Manage and maintain academic outreach budget.
- Evaluate and monitor academic outreach partnerships, and adapt actions according to changing needs of faculty, researchers and students.
- Act as primary lead for developing academic outreach activities which may include oversight of academic outreach committee volunteers.
- Identify and develop programs to involve, develop, engage, and manage academic stakeholders with support from academic outreach volunteers.
- Monitor activities of academic outreach volunteers assigned to manage the program.
- Attend regularly scheduled outreach team meetings/ conference calls and selected meetings.
- Create academic outreach articles for chapter newsletter that provide communications on outreach activities.
- Assure synergy between outreach projects/activities.
- Utilize PMI academic outreach resources to support designated outreach activities (found on the Marketing Portal and via the chapter partner).
- Work with the chapter board and chapter partner to develop an overall strategy and objectives for academic outreach that support the chapter and PMI Global.
- Develop metrics to measure success of academic outreach programs.

4. Outcomes

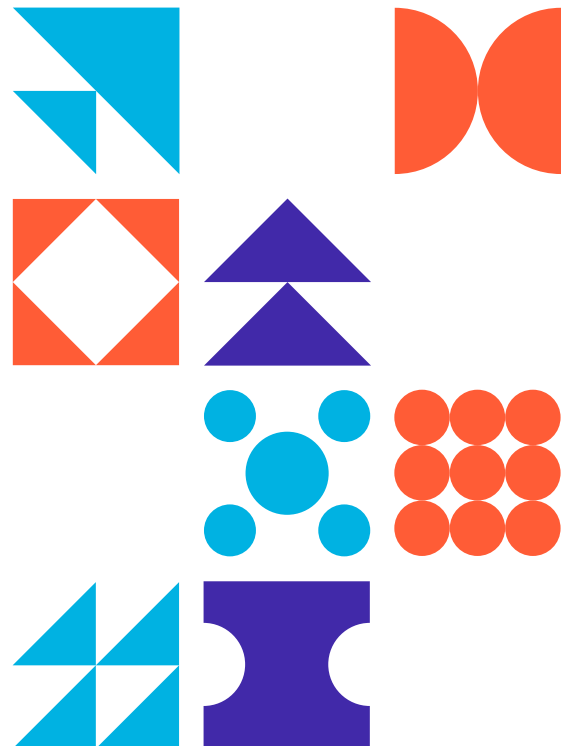
- Report monthly progress to the chapter board and for the annual chapter business planning with chapter partner.
- Incorporate feedback, suggestions, and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter as they relate to academic outreach resources and services.
- Help develop the role and responsibilities of the position and provide onboarding support for new volunteers and documentation of projects and activities.
- Gather lessons learned and develop procedures to ensure consistent messaging across outreach activities.
- Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Knowledge of university academic environment and structure
- Understanding PMI's approach for universities (including GAC accreditation process)

POWER SKILLS:

- Persuasion/motivation
- Relationship management
- Stakeholder management



EVENTS

DESCRIPTION:

Elected or appointed volunteer responsible for the overall planning, promotion, and logistics of various chapter seminars, roadshows, workshops, conventions, expos, conferences and other possible in-person, virtual or hybrid events that aim ultimately to foster chapter membership growth and retention, nurture the volunteer experience through engagement and deliver value to the project management community. This may also include, but is not limited to, supporting event marketing strategy, venue searches, recruiting and leading talented speakers and volunteers, managing expenses, developing sustainable partnerships with companies and organizations, and solving budget issues.

RESPONSIBILITIES:

1. Work with the chapter's board and Chapter Partner to develop an overall strategy, objectives, schedule and roadmap for chapter events.
2. Support identifying, contacting, and securing speakers for chapter events.
3. Supervise theme definition and content creation for each event.
4. Interact with other teams in the chapter seeking to provide ideas and support on the creation and development of requested events.
5. Serve as a link between the event organization team and external bodies.
6. Provide recruitment and training/coaching for the organizing committee for the purpose of the event.
7. Promote volunteer opportunities at chapter events.
8. Develop general event management policies.
9. Supervise the events production processes, guaranteeing events happen as planned.
10. Ensure that event staff and personnel adhere to the management policies that were put in place to minimize hiccups during the event.
11. Along with the events team of volunteers, develops and executes plans for delivering chapter events and workshops periodically.
12. Assess event venue requirements, and arrange venues for events, including meals, room layout, and other logistics as relevant.
13. Partner with Marketing and Communication for event promotion purposes, aiming to drive expansion of attendance numbers at events.
14. Oversee team of volunteers working on event day to set up and facilitate events.
15. Identifies, nurtures, leads and works with volunteer team to manage logistics during events.
16. Establish and maintain vendor relationships with existing and potential facilities.
17. Maintain venues and speakers' database for reference by any portfolio.
18. Assist with post event admin tasks (i.e., follow-up email to attendees, attendee satisfaction survey, project closeout activities).
19. Advocate for the chapter and the project management culture during chapter events.
20. Report progress to the chapter's board of directors on a regular basis.
21. Incorporate feedback, suggestions, and recommendations as necessary to enhance effectiveness and value delivery to the audience and the chapter.
22. Report progress to the chapter board on a regular basis (to be defined based on event complexity).
23. Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

- Event organization
- Program development
- Planning and execution

POWER SKILLS:

- Ability to manage and execute change
- Innovative
- Collaborative leadership
- Detail driven
- Customer focused

VOLUNTEER ENGAGEMENT

DESCRIPTION:

Elected or appointed volunteer responsible for managing the volunteer engagement experience of chapter volunteers: including recruitment, retention, recognition and leadership development training in accordance with chapter policies and bylaws.

RESPONSIBILITIES:

1. Recruitment

- Identify and develop programs to involve, develop, and engage volunteer members.
- Provide awareness of volunteerism with PMI at the local and global levels.
- Manage the chapter's use of PMI's Volunteer Relationship Management System (VRMS).
- Communicate volunteer opportunities to chapter members.
- Develop and conduct volunteer orientation for all new volunteers including an overview of the chapter volunteer structure, volunteer roles, responsibilities, and deliverables.

2. Retention

- Ensure a satisfactory volunteer experience that enhances volunteer retention.
- Ensure the volunteers are treated fairly and ethically and handle any disputes.
- Maintain chapter volunteer contact list.
- Understand and leverage the experience of volunteers and direct them to various initiatives in the chapter.

3. Recognition

- Develop and administer volunteer recognition programs.

4. Leadership Development Training

- Develop volunteers' skills and knowledge to serve in their volunteer roles.

5. Other

- Oversee, administer, and build awareness of the chapter's (and PMI's) volunteer policies, procedures, and guidelines.
- Oversee and manage the chapter's volunteer programs and services.
- Ensure verification and validation of volunteer project outcomes against the defined objectives.
- Chair the volunteer engagement committee, if applicable.
- Develop and implement succession and transition plan for the role.

BUSINESS ACUMEN SKILLS:

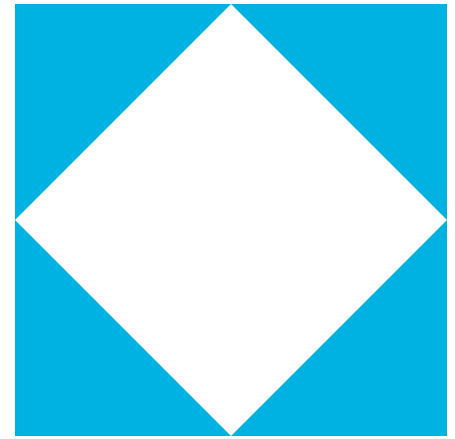
- Ability to use volunteer management software tools to match volunteers' skills with interests
- Proficient in email communications (e.g., MS Outlook, Google Mail)
- Understanding of volunteer recruitment methods and tools, such as PMI's VRMS
- Understanding of best practices in volunteer resource management
- Understanding of best practices in volunteer recognition and appreciation programs

POWER SKILLS:

- Coaching and mentoring
- Persuasion/motivation
- Team building

PMInsight

For ongoing operations, chapters should use the many online resources available from [PMInsight](#).



Tools

ThoughtSpot: A modern replacement to the legacy Chapter Reporting System (CRS), ThoughtSpot empowers chapter leaders to create, consume, and operationalize data-driven insights as well as get a quick glance at their chapter's KPIs in real-time.

Component System (CS): A web-based resource that provides chapter leaders with access to important information about their chapter, including, but not limited to, contact information, business records and a central location for accessing the Chapter Reporting System (CRS) and annual charter renewal.

Volunteer Relationship Management System (VRMS): An online recruitment platform that allows chapter leaders to post volunteer opportunities and enables individuals to search for chapter or global volunteer opportunities.

Chapter Collaboration Platform (CCP): A digital platform for PMI's global chapter leaders to enable meaningful interactions driving chapter integration and inter-chapter collaboration.

Marketing Portal: A central access point to PMI marketing materials for communication with project management practitioners and organizations. Access PMI branding resources and customizable templates, download or order preprinted materials, and more.

Support and Training

Chapter Leader Orientation: On-demand training designed to help chapter leaders prepare for their roles, whether they are a first-time leader or a seasoned leader taking on a new role within their chapter.

Chapter Leader Guides: In-depth, downloadable resources for chapter leaders covering essential topics including academic outreach, annual planning, financial management, onboarding and transitioning, and social good outreach.

PMI Picks™: A digital platform designed for PMI members and project professionals looking for bite-sized project management and power skill learnings that fit into their schedules. PMI Picks™ allows users to consume content "packs" on a related topic and bookmark content to build a custom library, and it provides recommendations based on interactions across the PMI ecosystem.

Continuing Certification Renewal System (CCRS): Visit our online Continuing Certification Renewal System (CCRS) to report PDUs and view your certification records.

