

CHAPTER LEADERSHIP ESSENTIALS

A photograph of three business professionals standing outdoors in a park-like setting. On the left, a man in a dark blue suit and striped tie is gesturing with his hands while speaking. In the center, a woman in an orange sleeveless top and black pants is listening attentively. On the right, another man in a dark blue suit and blue tie is also listening. The background shows green grass, trees, and a paved path.

# PMI Chapter Leaders' Guide:

Chapter Volunteer Role Delineation Study Results – Third Edition



GOOD THINGS HAPPEN WHEN YOU GET INVOLVED WITH PMI.



## About this Guide

This guide provides background information and reasoning behind the Chapter Volunteer Role Delineation Study (RDS), summarizes the RDS process and includes detailed descriptions of important chapter volunteer roles that directly support effective chapter management.

## Introduction

In 2012, PMI released the first edition of the Chapter Volunteer RDS. The study was the result of the collective input of our global volunteer chapter leaders and was done in an effort to better define the key volunteer roles that support efficient operations of PMI's chapters. Subsequent editions have added additional roles based on data collected via the Component System (CS) and Volunteer Relationship Management System (VRMS). The results of the RDS are used to develop educational content and chapter resources in addition to providing a framework for clear and consistent recruitment of volunteers to support chapter operations.

### The roles included in the Chapter Volunteer RDS are:

- President
- Vice President/President Elect
- Past President
- VP/Director of Administration/Secretary
- VP/Director of Finance/Treasurer
- VP/Director of Governance and Policy
- VP/Director of Volunteers
- VP/Director of Membership
- VP/Director of Marketing
- VP/Director of Communications
- Social Media Coordinator/Manager
- VP/Director of Technology
- VP/Director of Professional Development
- VP/Director of University Academic Outreach
- PMI Educational Foundation/PMI Chapter Liaison

## Chapter Volunteer RDS Methodology

- Data from the CS and VRMS was analyzed to identify common roles and to merge role titles and descriptions
- In-person RDS workshops were conducted at Leadership Institute Meetings (LIMs) and/or via online webinars to finalize descriptions for use in online surveys
- Chapter volunteers identified via the CS were invited to participate in RDS surveys
- Chapter volunteers verified role descriptions, skills, etc., via surveys based on roles they currently or previously held

## Chapter Volunteer Role Delineation Study Results

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

- Communication Skills
- Relationship Building/Networking Skills
- Organizational Skills
- Strategic Thinking

Before beginning any role, all new leaders should:

- View sessions in the Chapter Leader Orientation
- Review documents in the New Leader Orientation Pack
- Review the Chapter Leaders' Guide: Transitioning and Onboarding

**Please Note: You can access all of these important resources from the Volunteer Resource Center (PMI.org/vrc)**

The results of the RDS are organized into the following categories:

- Role Description
- Roles and Responsibilities
- Strategic and Business Management Skills
- Leadership Skills (in addition to those listed above)
- Estimated Volunteer Hours per Month
- Average Years of Project Management Experience
- Average Years of PMI Volunteer Experience

## Future Role Studies

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

### Access RDS Electronically

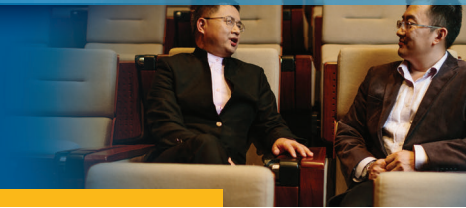
To download a pdf of this guide or order printed copies:  
Go to [PMI.org/VRC](https://www.pmi.org/VRC)  
Click on Essential Links >>Chapter Leaders' Guides

### Access Role Templates

1. Go to [vrms.PMI.org/](https://vrms.pmi.org/)
2. Log in using your PMI.org username and password
3. Click on Supervisor or Coordinator view
4. Click on the Templates tab
5. Select the template you wish to use
6. Copy, edit and post the opportunity on behalf of your chapter

For questions about using VRMS or to request Supervisor or Coordinator access on behalf of your chapter, contact [volunteer@pmi.org](mailto:volunteer@pmi.org)

**PMI thanks all of the volunteers who participated in this important study.**



## Help and Resources

PMI values its members and volunteers and has a specially trained team to assist you with managing your community and developing your volunteers and members. Below is a description of the PMI support available to you.

### CHAPTER DEVELOPMENT SUPPORT STAFF

PMI has community development support staff across the globe to support you and your chapter. Chapter development staff serve as the points of contact in all regions throughout the world. To determine the chapter staff in your region, click on Contact Information on the Volunteer Resource Center, [PMI.org/vrc](http://PMI.org/vrc).

**Manager, Chapter Development:** *Provides overall leadership and oversight of relationships, functions and services for the establishment, development and maintenance of PMI's chapters.*

**Chapter Partners:** *Provide support for annual chapter operation planning and execution*

- 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

**Chapter Administrators:** *Work with the chapter to:*

- Provide ongoing guidance, maintenance and support of general chapter operations
- Assist with chapter formation or reorganization
- Assist with the chapter renewal process
- Review bylaws/governing documents
- Provide assistance with regional online community sites and other PMI tools and resources

### REGION MENTORS

Region mentors are senior 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 PMI Chapter Development 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, and strategic planning and reporting objectives

## Volunteer Chapter Role Descriptions

### PRESIDENT

**ROLE DESCRIPTION:** Elected volunteer responsible for oversight of the chapter and the board. The president shall direct the activities of the other board members in accordance with the chapter bylaws.

#### ROLES AND RESPONSIBILITIES:

- Direct the chapter's strategic goals
- Achieve the chapter vision, mission and objectives as detailed by the chapter board, PMI and chapter business plans
- Direct the activities of other officers toward chapter goals and objectives
- Ensure that the chapter board works together as a team
- Represent the chapter at public events
- Ensure strategic alliance, planning and annual reporting
- Be ultimately accountable for all board operations and chapter activities
- Act as a liaison between the chapter and PMI
- Ensure that the charter renewal is updated and that the chapter is in compliance as specified by PMI
- Preside over the board of directors meetings and the annual general membership meeting
- Ensure that all chapter business is being done legally and ethically
- Assume responsibility for the overall functioning of the chapter
- Legally represent the organization (this role can be co-dependent with the VP/Director of Finance)
- Ensure statutory and regulatory compliance in consultation with the VP/Director of Finance
- With the board, ensure prudent disbursement of chapter funds
- Drive implementation of PMI policies and guidelines and ensure that they are reflected in chapter processes
- Manage periodic policy audits
- Promote leadership development opportunities for board development
- Develop and implement a succession and transition plan

#### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Management Skills
- Organization Management
- PMI Knowledge and Experience
- Volunteer Recognition and Appreciation

#### LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Coaching and Mentoring
- Conflict Resolution Skills
- Skilled in Strategic Planning and Process Execution
- Team Building Skills

Estimated Volunteer Hours per Month: **30-40**

Average Years of Project Management Experience: **18**

Average Years of PMI Volunteer Experience: **7.5**



## VICE PRESIDENT/PRESIDENT ELECT

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

### ROLES AND RESPONSIBILITIES:

- Represent the president in his or her absence
- Assume the role of president the year following successful completion of his or her duties in this role (depending on chapter bylaws)
- Assume the role of president if the president is unable to perform duties for any reason
- Assist the president in his or her duties
- Oversee the operations committee
- Serve as member ex-officio with the right to vote on all committees except the nominating committee
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Budget Management
- Financial Planning
- PMI Knowledge and Experience
- Resource Management

### LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Decision Making
- Skilled in Strategic Planning and Process Execution
- Team Building Skills

Estimated Volunteer Hours per Month: **20–30**

Average Years of Project Management Experience: **17**

Average Years of PMI Volunteer Experience: **7**

## PAST PRESIDENT

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**ROLE DESCRIPTION:** Immediate former elected volunteer responsible for oversight of the chapter and the board in accordance with chapter policies and bylaws.

### ROLES AND RESPONSIBILITIES:

- Maintain continuity in the chapter to help to ensure smooth board transitions
- Assist the board of directors with strategic policies
- Proactively support and promote the work within the board
- Assume the role of mentor for the president
- Assist the president in liaison with PMI if and when required
- Assume the position of chair for the nominating committee
- Lead and direct the elections process
- Provide ethics enforcement and guidance at the board of directors level
- Support conflict resolution
- Outreach with past presidents
- Develop and implement a succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Diplomacy
- Human Resource Management
- Parliamentary Procedures (i.e. Robert's Rule of Order)

### LEADERSHIP SKILLS:

- Coaching and Mentoring
- Conflict Resolution Skills
- Persuasion/Motivation Skills
- Skilled in Strategic Planning and Process Execution
- Team Building Skills

Estimated Volunteer Hours per Month: 15–20

Average Years of Project Management Experience: 23

Average Years of PMI Volunteer Experience: 11



### VP/DIRECTOR OF ADMINISTRATION/SECRETARY

**ROLE DESCRIPTION:** Elected volunteer responsible for preparing, maintaining, recording, circulating all records, correspondence, minutes of meetings, and related affairs of the chapter.

#### ROLES AND RESPONSIBILITIES:

- Assure safekeeping of all governing documents (approved bylaws, articles of incorporation, charter agreement, board policies, committee charters, and all other non-financial records for the chapter)
- Coordinate and distribute meeting agendas, keep the records of all business meetings of the chapter and meetings of the board
- Maintain all meeting minutes — must document in accordance with parliamentary procedures as determined by the board
- Notice of all annual meetings shall be sent to all members at least 30 - 45 days in advance of the meeting. Action at such meetings shall be limited to those agenda items contained in the notice of the meeting
- Provide records to members and outside organizations that request information
- Provide all notifications to the membership, directors, auditors and members of committees
- Coordinate distribution of all general correspondence
- Provide support for membership communication
- Oversee coordination of printed materials (logo items, business cards, etc.)
- Develop and implement succession and transition plan

#### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Ability to Record Minutes
- Knowledge of Chapter Bylaws and Policies
- Knowledge of Meeting Procedures
- Knowledge of PMI Bylaws and Policies
- Knowledge of Records Retention Requirements
- Meeting Coordination

#### LEADERSHIP SKILLS:

- Active Listening Skills
- Decision Making
- Excellent Writing Skills
- Time Management Skills

Estimated Volunteer Hours per Month: 15–25

Average Years of Project Management Experience: 14

Average Years of PMI Volunteer Experience: 5



## VP/DIRECTOR OF FINANCE/TREASURER

**ROLE DESCRIPTION:** Elected volunteer responsible for finance. Responsible for maintaining and presenting all financial records required for chapter operations in accordance with chapter and bylaws.

### ROLES AND RESPONSIBILITIES:

- Maintain and manage accounts receivable and payable and all financial portfolios, including but not limited to the collection of chapter dues from PMI, guest payments for chapter meetings or special events and the payment of all chapter bills in accordance with chapter committee directives
- Establish and maintain all required chapter bank accounts and/or similar financial transactions; arrange for officer signatures as required
- Provide financial reporting regarding the state of finances and chapter activity to chapter membership, board and executive level volunteer leaders on a monthly basis (board meeting)
- Report on the state of finances at board meetings and chapter meetings
- Develop an annual operating budget and financial statement to be included in the annual application for charter renewal
- Ensure the chapter has reviewed and reported required tax filings
- Recommend improvements in the financial processes to the board
- Establish, 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
- Maintain the annual budget
- Contribute to financial planning/goal setting, investing, forecasting and budgeting for the chapter
- Distribute/communicate financial section of the annual report to chapter membership
- Assist in the preparation of the annual financial statements and reports
- Provide timely information to independent auditors as required
- Keep an up to date inventory of all the goods of the chapter
- Handle all PMI and government required payments
- Ensure maintenance and storage of all historic financial documents in accordance with chapter board policies regarding Record Retention and Destruction policies
- Establish financial metrics; ensure chapter is maintaining requirements
- Serve as liaison with PMI Global on financial matters
- Prepare financial guidelines and procedures for the chapter along with board
- Analyze cost impact and income benefit of all activities proposed by the board of directors
- Review any chapter contract, agreement and insurance
- Distribute information, materials and/or fees received from the PMI Global to appropriate officers in a timely manner
- Confirm and check bank accounts monthly
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Accounting Software/Tools (e.g. Quick Books, Excel)
- Analytical Thinking
- Documentation Skills/Financial Record Keeping
- Knowledge of Financial Planning
- Knowledge of Generally Accepted Accounting Principles (GAAP)

### LEADERSHIP SKILLS:

- Decision Making
- Technical Tools Skills
- Time Management Skills
- Skilled in Strategic Planning and Process Execution

Estimated Volunteer Hours per Month: 25–35

Average Years of Project Management Experience: 17

Average Years of PMI Volunteer Experience: 5



## VP/DIRECTOR OF GOVERNANCE AND POLICY

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for addressing governance and policy issues, including ensuring the maintenance and enforcement of chapter policies and bylaws.

### ROLES AND RESPONSIBILITIES:

- Ensure the policies are consistent and compliant with all applicable governmental jurisdiction and regulations (e.g., IRS, government compliance, PMI policy, Sarbanes Oxley – local laws and regulations)
- Review and update bylaws and ensure they are in alignment with PMI Chapter Charter
- Ensure the chapter and/or bylaws are upheld and enforced
- Develop and maintain policy manual
- Identify gaps between PMI Global policies and chapter policies
- Develop and maintain information security/personal information policy
- Ensure and oversee roles/function definitions
- Address any breeches that may be brought up against a member and/or the chapter
- Assist in resolving chapter conflicts
- Raise awareness of and provide training on code of conduct/regulations/processes
- Be aware of the Ethics Review Process
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Experience with Developing Roles & Responsibilities
- Experience with Local Regulations & Laws
- Knowledge of PMI Ethical Code & Guidelines
- PMI Knowledge & Experience
- Policy Development Experience

### LEADERSHIP SKILLS:

- Conflict Resolution Skills
- Decision Making
- Excellent Writing Skills
- Facilitation Skills
- Skilled in Strategic Planning Process and Execution

Estimated Volunteer Hours per Month: 15–25

Average Years of Project Management Experience: 16

Average Years of PMI Volunteer Experience: 6

## VP/DIRECTOR OF VOLUNTEERS

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**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for addressing the needs of the volunteers, including recruitment, retention, recognition, and leadership development training and support in accordance with chapter policies and bylaws.

### ROLES AND RESPONSIBILITIES:

- Recruitment and/or retention of volunteers
- Conduct general volunteer orientation for all new volunteers including an overview of the volunteer structure, volunteer roles, responsibilities and deliverables
- Understand and leverage experience of volunteers and direct them to various initiatives in the chapter
- Identify and develop programs to involve, develop and engage volunteer members
- Oversee, administer and build awareness of the chapter (and PMI's) volunteer policies, procedures and guidelines
- Develop volunteers to serve in their volunteer roles
- Develop and administer volunteer recognition programs
- Oversee and manage the chapter's volunteer programs and services
- Provide PMI volunteer awareness at the local and global levels
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT 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 (PMI's Volunteer Relationship Management System)
- Understanding of volunteer resource management
- Understanding of volunteer recognition and appreciation programs

### LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Coaching and Mentoring
- Persuasion/Motivation Skills
- Team Building Skills

Estimated Volunteer Hours per Month: 20–30

Average Years of Project Management Experience: 17

Average Years of PMI Volunteer Experience: 6



## VP/DIRECTOR OF MEMBERSHIP

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for addressing the needs of chapter membership, including membership recruitment, retention, and associated value delivery in accordance with chapter policies and bylaws.

### ROLES AND RESPONSIBILITIES:

- **Develop and implement a Chapter Membership Plan**
  - Ensure continued growth through proactive recruiting, retention and member engagement, including the establishment of measurable goals and the monitoring of success metrics for appropriate action
  - Develop and implement a Community Outreach Plan including commercial, not-for-profit and other professional associations
- **Customer Service**
  - Answer general member/non-member information inquiries and other requests for assistance with membership and its benefits
  - Support and attend annual general meeting and all chapter meetings as appropriate
- **Primary user of the Chapter Reporting System (CRS) for analysis and reporting of membership data**
  - Maintain the membership records of the chapter
  - Provide communication list/member updates to officers as requested
  - Coordinate the production and distribution of timely membership reports, such as monthly membership reports by demographics (city, state, age, industry, etc.)
- **Market Research**
  - Review and analyze member satisfaction survey data and enhance membership benefits
  - Develop and administer lapsed (non-renewal) member survey
  - Analyze and integrate survey feedback for inclusion in the strategic/operational planning
- **Marketing and Member Engagement:**
  - Develop and implement membership welcome and support plan including the promotion of PMI and chapter membership value
  - Communicate member value through various delivery methods in alignment with the Membership Benefits Package
  - Utilize membership marketing materials available through the PMI Marketing Portal
  - Develop and implement a rewards and recognition program plan to recognize member milestones (such as anniversaries or awards)
- **Develop and implement succession and transition plan**

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Data Analysis & Reporting
- Marketing Skills
- Proficiency in using Survey Tools/Market Research/Demographic Research
- Proficiency in using PMI Chapter Reporting System (CRS)

### LEADERSHIP SKILLS:

- Persuasion/Motivation Skills
- Public Speaking/Presentation Skills
- Skilled in Strategic Planning and Process Execution

Estimated Volunteer Hours per Month: **25–35**      Average Years of Project Management Experience: **15**

Average Years of PMI Volunteer Experience: **6**

## VP/DIRECTOR OF MARKETING

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

### ROLES AND RESPONSIBILITIES:

- Develop and implement an integrated marketing and public relations program aligned with the chapter's strategic objectives
- Create and execute annual marketing and public relations plan with detailed activity calendar including email, social media, advertising, events, press releases, web updates, etc.
- Use best practices in marketing and public relations to promote the chapter and its activities to members and the community at large
- Develop all communication vehicles including, but not limited to emails, web content, press releases, social media posts, promotional materials, advertising, etc.
- Gain access to PMI's Marketing Portal and use PMI-provided marketing/PR 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
- Plan and purchase print and digital advertising
- Monitor, optimize and analyze all marketing and public relations activities
- Create and distribute public relations communications to local media outlets (e.g. local newspapers, radio stations and television) and manage local media inquiries
- Collaborate with local businesses and academic institutions, where appropriate, to publicize the chapter and PMI
- Monitor and coordinate branded presentations to external stakeholders and other organizations interested in the activities of PMI
- Maintain relationships with existing sponsors for continued revenue generation to fund the chapter's activities
- Coordinate and organize presentations to potential chapter, event and other sponsors
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Knowledge of Fundraising Techniques
- 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

### LEADERSHIP SKILLS:

- Public Speaking/Presentation Skills
- Persuasion/Motivation Skills
- Skilled in Strategic Planning & Process Execution

Estimated Volunteer Hours per Month: **25–35**

Average Years of Project Management Experience: **15**

Average Years of PMI Volunteer Experience: **5**



## VP/DIRECTOR OF COMMUNICATIONS

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for managing and coordinating communication channels in accordance with chapter policies and bylaws.

### ROLES AND RESPONSIBILITIES:

- Disseminate information both to and from the chapter in a timely manner
- Define and regularly update chapter communication strategy, policies, goals and objectives
- Maintain a communications schedule that details all chapter communications across all channels
- Supervise and support all communication channel activities of the chapter
- Perform and uphold duties, as specified by the chapter bylaws, board policies and procedures
- Work with Marketing Director/VP to ensure that chapters' brand is understood and leveraged in communication plans
- Lead the development, production and release of all chapter newsletters and communications
- Collaborate with website/technology officer to provide website content and provide input into website design
- Consult and collaborate with all members of the board to coordinate the communication needs of the chapter
- Balance the need for timely communication with the goal to keep communication concise, timely and appropriate. Manage the chapter's approved communications budget, in cooperation with finance officer
- Coordinate and distribute chapter event information to membership in a timely manner
- Submit information to PMI's communications department regarding chapter activities for possible publication in PMI Today (PMI's monthly membership newsletter) when deemed appropriate
- Develop and maintain the chapter's social media strategy and social media policy
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Experience in Developing Communications Strategy and Supporting Communication Plans
- Knowledge of PMI Global and Chapter Brand Guidelines
- Strong Written Communication Skills
- Strong Knowledge of Common Communication Vehicles (i.e. Newsletters, Annual Plans, Email Communications, etc.)

### LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Excellent Writing Skills
- Public Speaking/Presentation Skills
- Skilled in Strategic Planning and Process Execution
- Technical Tools Skills
- Team Building Skills

Estimated Volunteer Hours per Month: **25–35**

Average Years of Project Management Experience: **17**

Average Years of PMI Volunteer Experience: **6**

## SOCIAL MEDIA COORDINATOR/MANAGER

**ROLE DESCRIPTION:** Appointed volunteer reporting to the VP of Communications or VP of Marketing, responsible for implementing, optimizing, moderating and maintaining social media for the chapter in line with the chapter's social media policy, communication/marketing plan and PMI's Social Media Guidelines and brand standards for chapters.

### ROLES AND RESPONSIBILITIES:

- Follow the chapter's social media strategy and social media policy
- Ensure compliance with PMI's Social Media Guidelines and brand standards for chapters
- Provide leadership to other committees on the most effective methods of using the chapter social media presence for their needs
- Advise the chapter regarding opportunities and threats in the online environment
- Stay abreast of social media trends and technology and advise the chapter if and how to leverage them
- Learn about tools and applications that can enhance and/or automate social media activities
- Work closely with volunteers responsible for the chapter's online presence to present a cohesive digital identity in alignment with PMI's global brand standards
- Content creation as necessary, including posts, tweets, pins, pictures, infographics, videos, multimedia
- Curate content, finding and sharing information of interest to the chapter's audience while respecting copyright laws
- Respond to social media comments, concerns and complaints in a professional manner
- Advise on the best way to integrate social media in the chapter's website, marketing campaigns and content publishing
- Create and manage social media campaigns tailored to the specific needs of the chapter
- Monitor and post on behalf of the chapter to other people's blogs, social sites and so forth to develop new relationships
- Reach out to online communities to build chapter brand awareness
- Elevate the profile of the project management profession by disseminating PMI's thought leadership and research to a regional audience
- Develop and implement succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Basic Understanding of Current Trends in Social Media Technology and Applications
- Basic Understanding or Desire to Learning/Utilize Social Media Management Tools (for example: Hootsuite, Spredfast, Sprinklr, 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

### LEADERSHIP SKILLS:

- Excellent Writing Skills
- Technical Tools Skills

Estimated Volunteer Hours per Month: 15–25

Average Years of Project Management Experience: 12

Average Years of PMI Volunteer Experience: 5



## VP/DIRECTOR OF TECHNOLOGY

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for all aspects of chapter technology including 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.

### ROLES AND RESPONSIBILITIES:

- **Acquisition of Technology**
  - Participate in 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 current or proposed technologies
  - Lead implementation planning
  - Oversee training
- **Support/Maintenance of Technology**
  - Manage all chapter technology initiatives
  - Provide administrative support for chapter technologies
  - Provide vendor management of technology
  - 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 status updates to chapter leaders
  - Communicate service level agreements (SLAs) for issue/request intake process
  - Manage, recruit and onboard internal and external technology team members and ensure technology team is providing timely responses to support requests
  - Coordinate and collaborate with other chapter board members and volunteers where needed
- **Data Analytics**
  - Per PMI current and future membership and data protection policies:
    - Provide general data support including, but not limited to, gathering and providing data
    - Create awareness of available data and the value of it
  - Provide various analytic reports to chapter leaders including:
    - Referral source
    - Email conversion and A/B testing
    - Web analytics
    - System reports: operational defects in IT systems
- **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
  - Manage internet site security/system monitoring
  - Maintain the process and methods for access rights for chapter systems
  - Assess risk in IT systems
  - Maintain IT security policies



## VP/DIRECTOR OF TECHNOLOGY *continued*

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### ■ Long Range and Annual Planning

- 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

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS

- Contract & Vendor Management
- Data Analysis & Reporting
- Organizational Change Management
- Management Skills
- Skilled in Strategic Planning Process

### LEADERSHIP SKILLS

- Technical Tool Skills
- Decision Making
- Stakeholder Management

Estimated Volunteer Hours per Month: 15–25

Average Years of Project Management Experience: 16

Average Years of PMI Volunteer Experience: 7



## VP/DIRECTOR OF PROFESSIONAL DEVELOPMENT

*In some chapters, this role is referred to as the VP/Director of Education or the VP/Director of Events*

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for professional development, education and chapter events in accordance with chapter policies and bylaws.

- Responsible for the development of chapter education activities to include:
  - Preparation and maintenance of PMI's certifications
  - Develop and maintain relationships with local colleges and universities
- Responsible for establishing and managing chapter professional development programs, live and online
- Maintain relationships with Registered Education Providers (R.E.P.s)

### ROLES AND RESPONSIBILITIES:

- Define strategies for improvement in professional development/training programs
- Develop and implement a chapter professional development plan, including a program roadmap for professional development content programs
- Develop plans for and coordinate the chapter's external educational activities, such as study groups, seminars, workshops, courses, professional development days and other educational activities
- Manage chapter-created credential examination review courses and other such courses
- Provide information to members and non-members on career development
- Provide information and guidance to members and non-members on certification/re-certification in the context of PMI
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter regarding the contents of programs
- Work with marketing to promote the education, certification, as well as training opportunities offered by the chapter
- Recommend, develop and deliver project management education materials, courses, presentations and sessions including leadership development training programs
- Seek new project management professional development programs and services through networking with other educational organizations and PMI chapters
- Promote 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
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter as they relate to the logistics of events/programs
- Oversee events, presentations and training programs
- Invite key influencers from industry to participate in chapter events
- Advance the project management profession through the planning and coordination of special events, as identified by the chapter's board
- Develop and implement a succession and transition plan

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Ability to Develop and Manage Program and Event Schedules
- Content & Curriculum Development
- Knowledge of PMI Credentials and PDUs
- Program and Event Planning Skills

### LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Coaching and Mentoring
- Public Speaking/Presentation Skills
- Team Building Skills

Estimated Volunteer Hours per Month: 25–35

Average Years of Project Management Experience: 18

Average Years of PMI Volunteer Experience: 7

## VP/DIRECTOR OF UNIVERSITY ACADEMIC OUTREACH

**ROLE DESCRIPTION:** Elected or appointed volunteer responsible for University Academic Outreach. The Director/VP of University Academic Outreach is responsible for developing a strategy and implementing programs that form sustainable partnerships and yield mutual benefits for tertiary/higher educational institutions.

### ROLES AND RESPONSIBILITIES:

- Work with the chapter's board of directors and chapter partner to develop an overall strategy and objectives for academic outreach that support the objectives of the chapter and PMI Global
- Develop and implement innovative programs to support academic outreach strategy
- Develop metrics to measure success of academic outreach programs
- Develop strategies and programs to support the establishment of "partnerships" for mutual benefit with academic institutions that help promote the chapter and the project management profession
- Evaluate and maintain academic outreach partnerships
- Monitor activities of academic outreach volunteers assigned to manage the program
- Maintain a record of local academic contacts
- Manage and maintain academic outreach budget
- Utilize PMI academic outreach resources to support designated outreach activities (found on the Marketing Portal)
- Provide input to PMI's academic outreach staff that will contribute to the development of academic outreach resources and services for chapter use (found on the Marketing Portal)
- Report monthly progress to the chapter's board of directors 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
- Act as primary lead for developing academic outreach activities which may include oversight of academic outreach committee volunteers
- Responsible for making local academic institutions aware of PMI and the benefits of chapter support, and PMI products/programs/ initiatives relevant to an academic audience
- Responsible for identifying and developing programs to involve, develop, engage and manage academic stakeholders
- Assure synergy between outreach projects/activities
- Gather lessons learned and develop procedures to ensure consistent messaging across outreach activities
- Attend regularly scheduled outreach team meetings/conference calls and selected meetings
- Create academic outreach articles for chapter newsletter that provide communications on outreach activities
- Responsible for helping to develop the role and responsibilities of the position and provide onboarding support for new volunteers
- Enhance executive-level awareness of academic outreach programs that should be considered for the chapter and its members

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Knowledge of University Academic Environment and Structure
- Understanding PMI Approach for Universities (including Accreditation Process)

### LEADERSHIP SKILLS:

- Decision Making
- Persuasion/Motivation Skills
- Skilled in Strategic Planning and Process Execution
- Stakeholder Management

Estimated Volunteer Hours per Month: 15-25      Average Years of Project Management Experience: 16

Average Years of PMI Volunteer Experience: 6



## PMIEF/PMI CHAPTER LIAISON

**ROLE DESCRIPTION:** Appointed volunteer responsible for serving as the primary link between the PMI chapter and the PMI Educational Foundation (PMIEF), PMI's philanthropic arm and registered nonprofit organization, by building connections and networking both throughout the community and within the chapter.

### ROLES AND RESPONSIBILITIES:

- **Serving the Chapter**
  - Design and promote social good events, including those that serve community needs and are requested by chapter board members (e.g., VP of Outreach, VP of Professional Development, or VP of Events)
  - Raise awareness and deliver member value through the promotion/advocacy of chapter social good programs and PMIEF no-cost resources (learning resources, templates, academic scholarships, awards, careers in PM, PMIEF newsletter, etc.) that support engagement in the local community
  - Engage fellow volunteers through social good programs and opportunities for developing their skills and participating in the community
  - Network with communities that can benefit from social good programs and free resources provided by PMIEF (e.g. schools, nonprofits, other organizations, etc.)
  - As invited, participate in chapter annual planning and propose a yearly business plan specific to PMIEF
  - Provide chapter board members with regular updates on social good programs being carried out locally
  - Be familiar with all content related to role as published on PMIEF.org
- **Communicating and Increasing Awareness**
  - Promote social good initiatives organized by the chapter through different channels (press, social media, etc.) to increase visibility among your PMI chapter members and local community and provide reports on their impact
  - Collaborate with and communicate regularly with PMIEF Community Engagement Committee members on a variety of chapter social good programs and planning
  - Inform PMIEF staff administrator periodically regarding chapter social good programs that are being carried out and those initiatives that have been suggested/proposed by your chapter
- **Staying Informed**
  - Become knowledgeable about PMIEF programs, products, resources and partnership opportunities
  - Attend PMIEF virtual trainings, webinars and monthly teleconferences
  - Subscribe to and remain up-to-date with two PMIEF monthly e-newsletters: *PM For Social Good*<sup>®</sup> and *PMIEF/PMI Chapter Liaison*.
  - Participate in virtual events, webinars, and dedicated trainings that further increase awareness, exposure and insights regarding the PMIEF
  - Participate in global liaison community in development of and sharing of best practices

### STRATEGIC AND BUSINESS MANAGEMENT SKILLS:

- Passion for using project management for the good of others in society (youth, teachers, under-privileged individuals, nonprofits, etc.).
- PMI knowledge and experience at the chapter level
- Ability to work independently on sensitive and complex matters
- Demonstrated success in working well with people and teams and ability to build relationships both with community organizations and among chapter volunteers
- English proficiency, both written and verbal

### LEADERSHIP SKILLS:

- Public Speaking/Presentation Skills
- Stakeholder Management
- Persuasion/Motivation Skills
- Adaptability/Flexibility

Estimated Volunteer Hours per Month: 10–20  
Average Years of PMI Volunteer Experience: 7

Average Years of Project Management Experience: 16

## PMI ABBREVIATIONS AND ACRONYMS

As a reference, we have provided a list of the most commonly used PMI acronyms and abbreviations

Term	Definition	Description
AG	Advisory Group	Provides professional support and input to PMI
AP	Asia Pacific – a PMI region	PMI is divided by four sub-regions: North America, Latin America, EMEA and Asia Pacific
CAPM®	Certified Associate in Project Management Credential	A good entry-level PMI certification if you're new to project management
CCRS	Continuing Certification Requirements System	Online PDU reporting resource
CRS	Chapter Reporting System	Online reporting of chapter data and survey results
CS	Component System	Online system where chapter information can be located
CWS	Chapter Web Services	Selected website vendors that interface with PMI services for single sign-on
EMEA	Europe, Middle East and Africa	PMI is divided by four sub-regions: North America, Latin America, EMEA and Asia Pacific
GAC	Global Accreditation Center	The PMI-sponsored body responsible for accreditation of degree and approval of certificate programs in project management
GOC	Global Operations Center	PMI office located in Newtown Square, Pennsylvania
LA or LATAM	Latin America	PMI is divided by four sub-regions: North America, Latin America, EMEA and Asia Pacific
LIM	Leadership Institute Meeting	Global face-to-face meetings where chapter leaders collaborate in productive, curriculum-driven educational sessions
LIVPM	Leadership Institute Volunteer Planning Meeting	Annual planning and development meeting for our global Advisory Groups and Board Support Committees to interact, plan their programs for the year and provide valuable strategic input to the PMI Board of Directors
MAG	Member Advisory Group	Provides membership and professional communications and expertise for PMI in the development and implementation of program operations to achieve the strategic objectives established by the PMI Board and the established operational program direction
NA	North America	PMI is divided by four sub-regions: North America, Latin America, EMEA and Asia Pacific
OLC	Online Learning Community	Online community where leaders share best practices, events and documents.



## PMI ABBREVIATIONS AND ACRONYMS *continued*

Term	Definition	Description
PDU	Professional Development Unit	Measuring unit used to quantify approved learning and professional service activities toward maintenance of PMI credentials
<i>PMBOK® Guide</i>	A Guide to the Project Management Body of Knowledge	PMI global standards provide guidelines, rules and characteristics for project, program and portfolio management
PMIEF	Project Management Institute Educational Foundation	PMIEF leverages project management for educational good for primary and secondary school students, as well as the community at large
PMI-ACP®	PMI Agile Certified Practitioner	Credential designed for practitioners who utilize agile approaches to project management in their projects
PMI-PBA <sup>SM</sup>	Professional in Business Analysis	Credential designed to include research that addresses the specific role business analysis serves that most directly impacts project success. With this certification, organizations will be able to validate the skills, knowledge and competence of business analysis practitioners.
PMI-RMP®	PMI Risk Management Professional	A specialty credential that demonstrates competence in assessing project risks, mitigating threats and capitalizing on opportunities
PMI-SP®	PMI Scheduling Professional	A specialty credential for practitioners who want to focus on developing and maintaining project schedules
PMO	Program or Project Management Office	A group or department within a business, agency or enterprise that defines and maintains standards for project management within the organization
PgMP®	Program Management Professional	Credential designed for those who manage multiple, complex projects to achieve strategic and organizational results
PMP®	Project Management Professional	The most important globally recognized and independently validated credential for project managers; perfect if you have demonstrated experience and competence in leading project teams
R.E.P.	Registered Education Provider	Training providers registered under PMI's Registered Education Provider Program
VRMS	Volunteer Relationship Management System	Online tool that allows you to search for or post chapter or global volunteer opportunities

## RESOURCES AND TOOLS

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### Online Resources

For ongoing operations, chapters should use the many online resources available to them. Unless otherwise indicated, resources are available from the Volunteer Resource Center ([PMI.org/vrc](http://PMI.org/vrc)). Examples include:

- **Chapter Reporting System (CRS):** A web-based resource that provides chapter leaders with access to current and prospective membership reports and multiple years' survey results from the PMI Annual Chapter Member Satisfaction Survey.
- **Community Leadership Site:** A web-based resource for all chapter leaders to access information to support the development and administration of a PMI chapter, including a full list of essential tools and resources, available at [leadership.vc.PMI.org](http://leadership.vc.PMI.org).
- **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.
- **PMI Learn:** An online learning and knowledge portal for PMI's volunteer leaders.
- **PMI Marketing Portal:** A central access point to PMI marketing materials for communication with project management practitioners and organizations. You can access PMI branding resources and customizable templates. You can also download or order preprinted materials and more.
- **Volunteer Management Relationship System (VRMS):** Create and post volunteer opportunities for your chapter.

### Human Resources

Your Chapter Partner, Chapter Administrator and Region Mentor are good sources to assist chapters in building their annual plans. Contact information for these resources can be found on the Volunteer Resource Center ([PMI.org/vrc](http://PMI.org/vrc) >>Contact). Past presidents or other key resources that were, and may still be, involved with the chapter can be called upon to assist. The planning session could include members of the outgoing board and the incoming board, as well as representatives of key committees, branches or stakeholders.

### Balanced Scorecard (Core and Extended Services)

The Balanced Scorecard that the chapter completes based on the Catalog of Core and Extended Services may be a useful basis to determine potential challenges and opportunities.

### PMI Strategic Plan

The PMI Strategic Plan should be reviewed prior to planning and serve as the basis for the chapter's annual planning process. Access the PMI Strategic Plan from the Volunteer Resource Center ([PMI.org/vrc](http://PMI.org/vrc) >>Essential Links).



## Chapter Leaders' Guides available from PMI

- Onboarding and Transitioning
- Volunteer Role Delineation Study Results
- Financial Management for Chapters
- Chapter Academic Outreach
- Chapter Elections
- Annual Planning Process for Chapters