

## 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**

## **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 the 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**

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

**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 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 a 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

## **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



## **VP/DIRECTOR OF PROFESSIONAL DEVELOPMENT, EDUCATION AND 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 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**

## **PAST PRESIDENT**

### **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