

Chapter Conflict Management Program

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1. PURPOSE AND OVERVIEW

The purpose of the Project Management Institute's (PMI) Chapter Conflict Management Program (also referred to as the "Program") is to provide a fair and timely process for addressing conflicts that may arise within chapters among volunteers and/or members.

Conflicts at the chapter level are classified into two categories: Disputes and Complaints.

- **Disputes** involve two volunteers engaged in disruptive behavior that affects the chapter environment and requires intervention or Mediation. This Program document provides the framework for resolving such Disputes constructively in Section 2.
- **Complaints** are concerns raised by an individual, typically related to chapter policies, operations, events, or interactions with others that do not necessarily involve two conflicting parties. These should be addressed using the guidelines in Section 3.

Please refer to the appropriate guidelines based on the type of conflict to ensure the issue is addressed through the correct process.

2. DISPUTE RESOLUTION

As part of the Chapter Conflict Management Program, Disputes between chapter volunteers are addressed through a structured, multi-stage resolution process. This process is designed to encourage resolution at the most local and collaborative level possible, before progressing to more formal intervention. The phases of the Dispute resolution process are as follows:

1. **Disputant Facilitation:** The individuals involved in the Dispute are encouraged to engage in direct dialogue to resolve the issue themselves. This initial step promotes accountability and open communication between parties.
2. **Chapter Facilitation:** If the Dispute cannot be resolved through direct facilitation, support may be provided by Chapter Leaders, the PMI Regional Chapter Engagement team, and/or the Region Mentor. The goal is to facilitate resolution with the help of local leadership.
3. **Mediation:** When internal efforts are unsuccessful, a PMI-trained Conflict Mediator may be assigned to guide the parties through a structured Mediation process. The mediator acts as a neutral third party to support a fair and mutually acceptable resolution.
4. **Arbitration:** In exceptional cases where Mediation does not lead to agreement, either party may choose to pursue binding Arbitration. This process is not facilitated, managed, or reimbursed by PMI. It is entirely voluntary and must be initiated and paid for by the parties themselves, including selecting the arbitration provider and covering any associated costs.

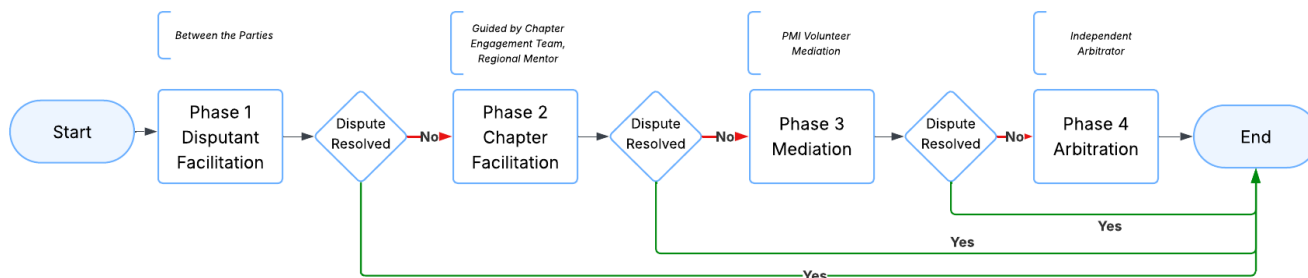


Figure 1-Dispute Resolution Phases

The Program emphasizes early resolution by promoting strategies such as trust-building, open communication, informal negotiation, and collaborative problem-solving. Disputes eligible for this process typically involve volunteers whose unresolved conflict may:

- Disrupt their ability to fulfill roles effectively
- Affect other volunteers
- Impact chapter operations

Understanding the root causes of conflict, including concerns related to chapter policies or procedures, is essential for meaningful resolution. These broader issues should be addressed in parallel with the interpersonal conflict, in coordination with Chapter Leadership when appropriate.

Chapter Disputes may include interpersonal disagreements or ongoing interactions, such as communication breakdowns, personality clashes, or perceived slights, that result in continued tension between two volunteers or leaders (“Disputants”).

To support a consistent and constructive experience throughout this process, participants are encouraged to consult the **Mediation Guidelines, Tips and Advice (Appendix 5.2)**. These practical insights help Disputants prepare, engage in respectful dialogue, and understand what to expect at each stage. While focused primarily on the Mediation phase, the principles—such as active listening, preparation, and good faith participation—are relevant and beneficial across all phases of the conflict resolution journey.

2.1 Ineligible Disputes

Ineligible Disputes include, but are not limited to:

- Those arising from any disagreements involving the interpretation of governance, policy, or procedures documents, which should be resolved at the chapter level, with the chapter board having final authority.
- Disputes between PMI and a Chapter (or Chapters) relating to the interpretation of, or otherwise, arising from the terms of, the Charter Agreement, but will follow the guidelines listed in the PMI Chapter Charter Agreement.
- Complaints regarding PMI or the PMI team. Any such complaints are governed by the [PMI Grievance Policy](#).
- Any employment-related issues between the chapter and any of its employees, to the extent that the chapter has any employees.
- Conflicts between the chapters and their individual members

2.2 Phase One – Disputant Facilitation

The objective of the Disputant Facilitation phase is to allow the Disputants an opportunity to engage each other directly in a structured manner. This phase allows the Disputants to gain an appreciation for each other’s understanding of the conflict and focuses the discussions on the options for resolution.

Successful outcomes occur when Disputants are motivated to seek a win-win scenario. This can be achieved when both parties are willing to have constructive discussions focused on the options for resolution, rather than on what caused the Dispute. Both parties need also to prepare for more “give & take” and less optimal outcomes when the Dispute progresses unresolved through the subsequent phases of this Program. It is important to understand that pursuing Phases 2 – 4 usually does not improve the resolution outcome and is only meant to “assist/facilitate” when both parties are unable to communicate with each other effectively and professionally.

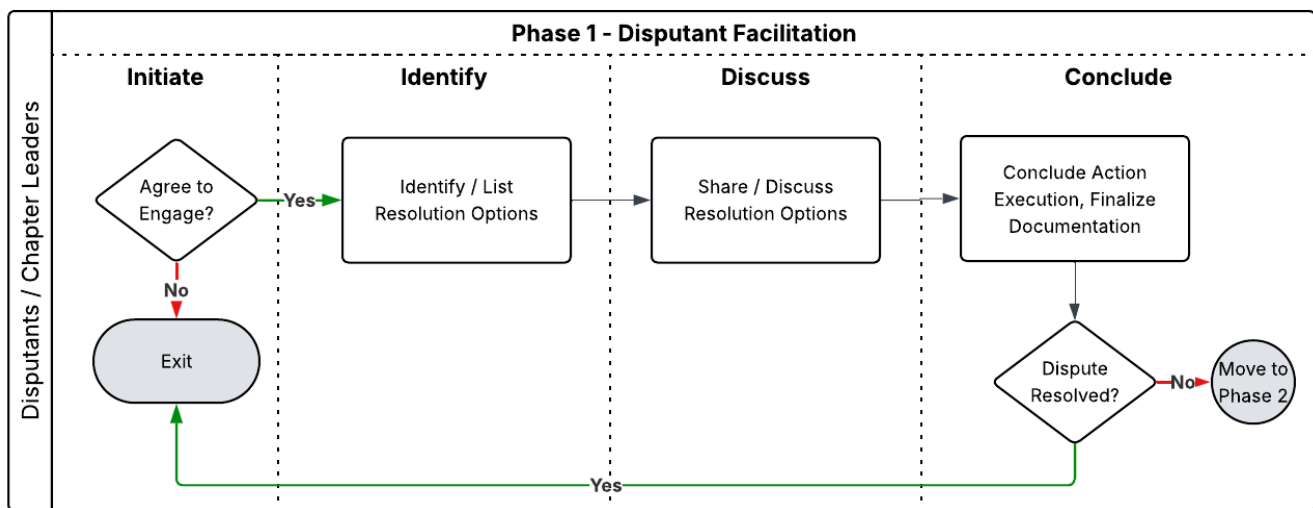


Figure 2 - Dispute Facilitation Process

2.2.1 Process Flow

This facilitation should follow a four-step process:

1. Initiate - agree to engage
2. Identify - identify resolution options
3. Discuss - discuss resolution options
4. Conclude – conclude action execution, finalize documentation

2.2.2 Initiate

Both parties need to agree to participate in the discussion and align a mutual understanding of the Dispute situation (cause of the Dispute, why it persists, individual viewpoints). The best approach would be face-to-face discussion but can also be remote.

2.2.3 Identify

Each party should review the mutual understanding of the Dispute situation and document a list of resolution options (what would resolve the conflict). The best approach would be for each party to do this activity separately over a period of 3 - 5 days.

2.2.4 Discussion

Both parties meet to share and discuss their list of resolution options. And then attempt to align on one of the resolution options. Both parties should seek to find either an Optimal (win-win) or an Acceptable (give & take) option or even consider the option of “agreeing to disagree”. The best approach would be a (or multiple) face-to-face discussion.

2.2.5 Conclude

Results of the discussion and expected actions should be documented. Both parties should align on the status of the Dispute as either:

1. **Resolved** - document the option both parties aligned with that resolves the conflict
2. **Not to Resolve** - both parties agree to not resolve and not pursue further facilitation
3. **Pause & Retry** - both parties agree to pause for a period of time & re-attempt facilitation
4. **Unresolved** - Both parties aligned to move to Phase Two. To initiate Chapter Facilitation, a write-up of the conflict and outcomes of Phase One facilitation should be given to the Chapter President who will then provide guidance on next steps. The best approach would be to document these results, actions, and Dispute status during the face-to-face discussion step.

The total duration for Phase One, from Initiation to Conclusion, should not exceed fourteen (14) days.

2.3 Phase Two – Chapter Facilitation

The objective of the Chapter Facilitation Phase is to help the parties resolve their Dispute with the help of an experienced Chapter Leader, input from PMI Chapter Engagement Team, and the Region Mentor that oversees the local chapter representing the Disputants, as needed.

Chapter Leadership will first evaluate the Dispute situation and outcomes of Phase One and determine if it qualifies for facilitation. If they determine the Dispute situation is not appropriate for this program, they will summarize their determination, and the request will be dismissed.

The Chapter will assign a Facilitator to assist discussions between the Disputants to reach a resolution outcome. During this phase, the Disputants share their views with the Chapter Facilitator, who will guide them to help resolve the situation as early as possible.

2.3.1 Process Flow

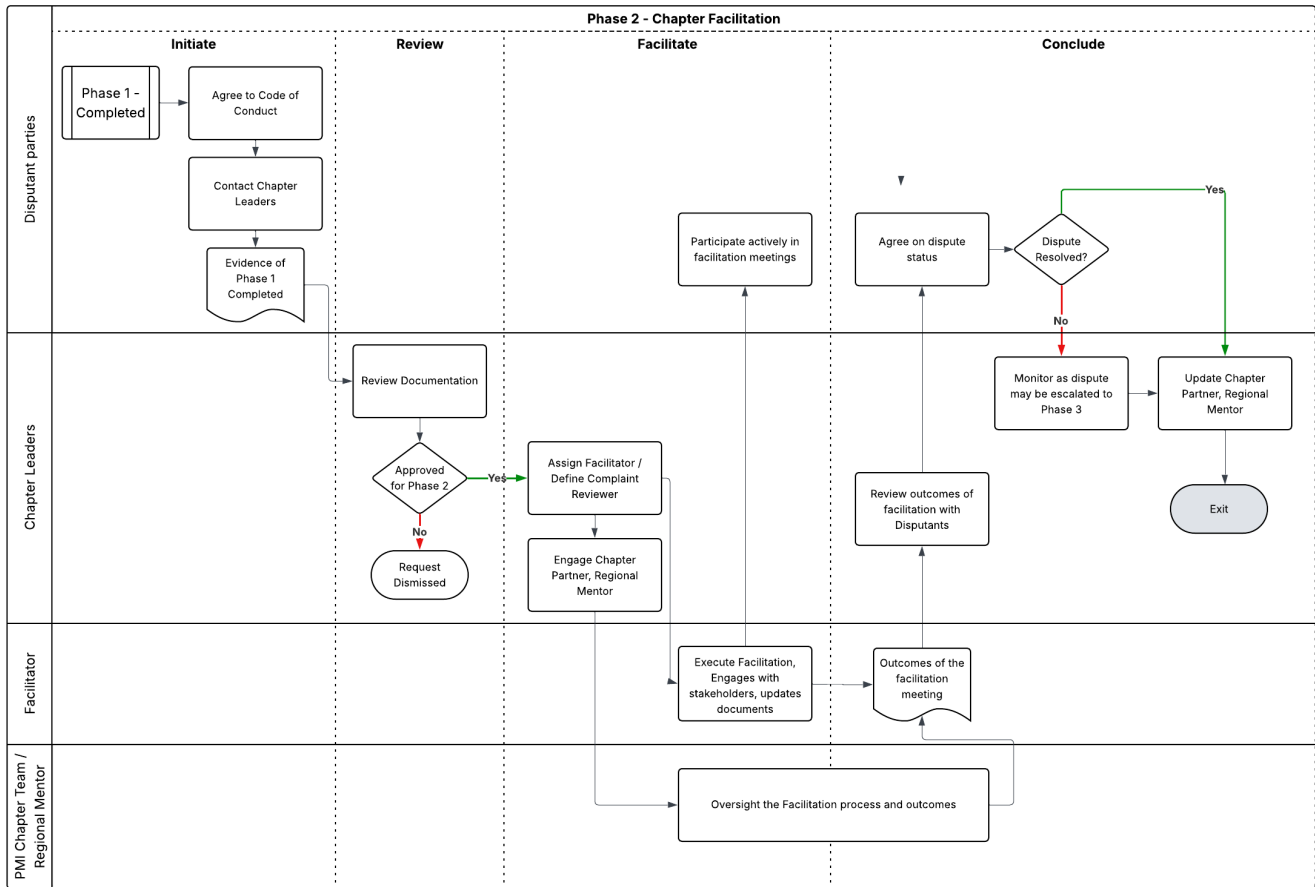


Figure 3 - Chapter Facilitation Process

2.3.2 Pre-requisites for Phase Two:

For this phase

- Phase One must be complete, and the outputs/results must be made available to the Chapter.
- Disputants must contact Chapter Leaders, their designated PMI Chapter Engagement Team member, or the Region Mentor, and provide evidence of Disputant Facilitation.
- Disputants recognize their acknowledgement of adherence to **PMI Code of Ethics and Professional Conduct**.

2.3.3 Parties to be Involved:

- Chapter Leaders
- PMI Chapter Engagement Team: Chapter Partner, Chapter Manager
- PMI Region Mentor
- Disputing Parties

2.3.4 Initiate

The Chapter Facilitation Phase is initiated once Phase One—Disputant Facilitation—has been completed and the conflict remains unresolved. At this point, both Disputants must reaffirm their agreement to PMI’s

Code of Conduct and notify Chapter Leadership of their intent to proceed. They are expected to provide documentation or evidence of the unresolved Dispute from Phase One. This step formally activates Chapter involvement in the facilitation process and signals the beginning of structured support from leadership and designated Facilitators.

2.3.5 Review

Chapter Leaders review all documentation submitted from Phase One and assess whether the Dispute qualifies for Chapter Facilitation. If the case is approved, Chapter Leadership will assign a Facilitator or designate a Dispute Reviewer, who may be the Chapter President, a board member, or an experienced Past Chapter Leader. The Region Mentor or PMI Chapter Engagement Team may also be engaged to provide additional input.

During this step, Chapter Leaders will also analyze the context of the conflict to determine if there are related or contributing issues—such as chapter operations or policies—that may need to be addressed alongside the interpersonal Dispute.

The Facilitator will analyze the information generated in Phase One and decide on the format of the facilitation session(s).

If the Chapter determines that the case is not appropriate for Chapter Facilitation, the reasons will be documented and the request dismissed. The Disputants will be informed accordingly.

2.3.6 Facilitate

The assigned Facilitator is responsible for scheduling and leading facilitation sessions with the Disputants. These sessions aim to clarify each party's views, reinforce understanding of PMI's Conflict Management process, the consequences of going to the next step in the process and help Disputants explore paths toward resolution—even if it requires trade-offs.

Typical questions posed during this phase might include:

- What would a win be for you?
- What are you willing to give up?

The Facilitator may offer resolution paths ranging from an optimal option (win-win for each), an acceptable option (with trade-offs from each part) or even an “agree to disagree” option. Throughout the process, the Facilitator will keep records up to date and communicate progress to Chapter Leadership.

2.3.7 Conclude

At the conclusion of the facilitation process, The Facilitator must document the outcomes that the parties have achieved, as well as the status of the Dispute. The possible outcomes include:

1. **Dispute resolved** – The Disputants have reached an agreement.
2. **Dispute unresolved** – The Disputants maintain disagreement and are unable to find an agreeable resolution.

3. **Dispute not to be solved** – Both parties agree to leave the matter unresolved.

If the Dispute remains unresolved and both parties agree to proceed, the case may advance to Phase 3: Mediation.

2.4 Phase Three – Mediation

The objective of the Mediation Phase is to support Disputants in reaching a mutually agreeable resolution with the assistance of a trained, neutral third party, a PMI volunteer Conflict Mediator. This phase provides a more structured and guided environment for addressing unresolved issues from the previous facilitation phases.

Once both Disputant and Chapter Facilitation efforts have been exhausted, a [PMI Chapter Conflict Report](#), is submitted along with documentation from the earlier phases, PMI's Global Chapter Programs team will review the case. If deemed appropriate, a qualified volunteer mediator from the Culture & Diversity team will be assigned.

PMI Volunteer mediators are trained to maintain neutrality and to be impartial facilitators. They will not judge the facts in a case or advocate for either side of the Dispute and help both sides develop options together.

The Mediation Phase introduces formal preparation and structured dialogue. The assigned mediator will lead the process, ensuring both parties engage in respectful and productive discussions aimed at identifying options for resolution. Participation in this phase requires a commitment from both Disputants to work in good faith under the mediator's guidance.

Mediators will maintain the confidentiality of the session proceedings. Confidentiality will be maintained with understanding that outputs and results will be shared with the PMI Chapter Engagement Team and Chapter President (or appropriate Chapter Leadership, which may include the Chapter Board). The PMI Chapter Conflict Mediation is a fully remote process, and all Mediation sessions will take place virtually.

2.4.1 Process Flow

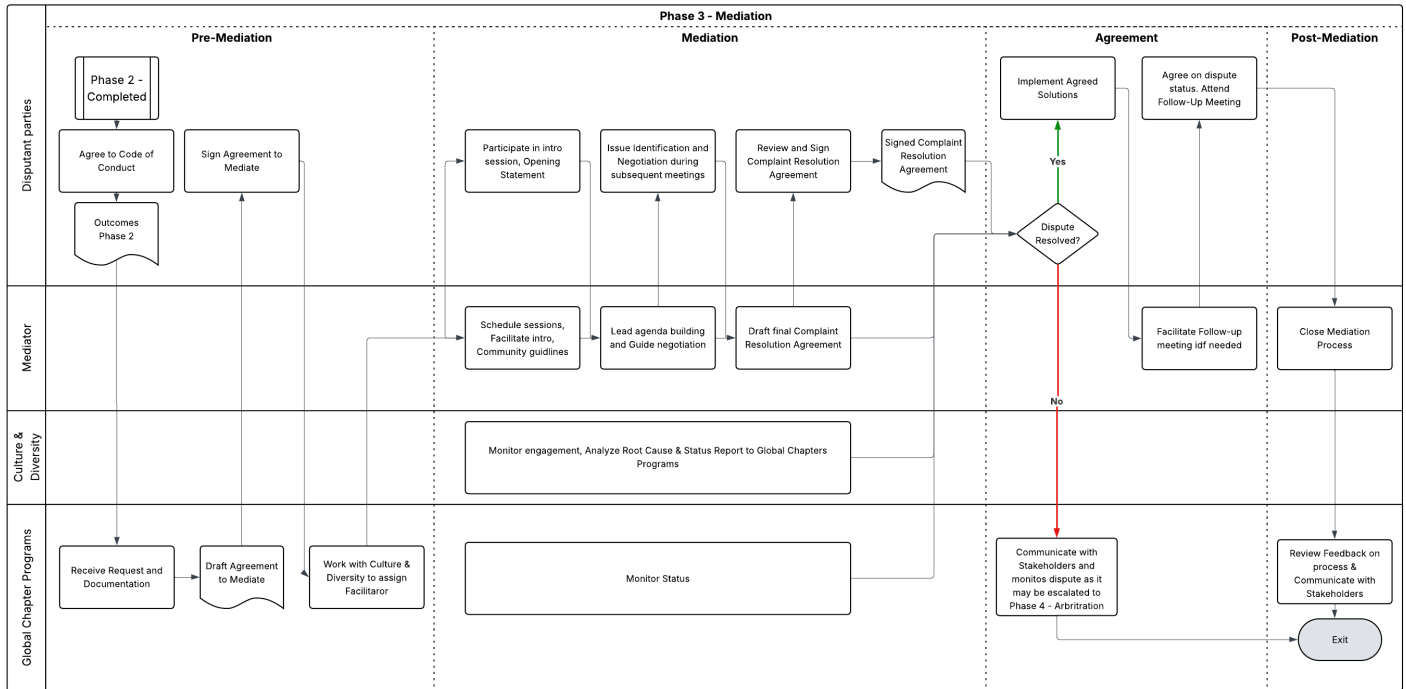


Figure 4 - Mediation Process

2.4.2 Pre-requisites for Phase Three:

For this phase

- Phase Two must be complete, and the outputs/results must be made available to the Chapter Global Programs.
- Disputants must contact Chapter Leaders, their designated PMI Chapter Engagement Team member, or the Region Mentor and request Mediation
- Disputants recognize their acknowledgement of adherence to **PMI Code of Ethics and Professional Conduct**.

The facilitation should follow a 4-step process:

2.4.3 Parties to be Involved:

- Disputing Parties
- PMI Global Chapter Programs
- Conflict Mediator
- PMI Culture & Diversity

2.4.4 Pre-Mediation

When Chapter Facilitation (Phase Two) does not result in resolution, Disputants may request to proceed to Mediation. To initiate this phase, both parties must:

- Reaffirm adherence to PMI’s Code of Conduct
- Submit documentation showing the unresolved nature of the conflict
- Formally request Mediation through the Global Chapter Programs Team by submitting the Request for Mediation Form

PMI’s Global Chapter Programs will review the request. If appropriate, both parties are asked to sign an **Agreement to Mediate** ((See Section 5.1 Appendix A for template and Section 5.2 Appendix B for Mediation Guidelines), which outlines the process and affirms their mutual commitment to participate in good faith and documents the mutually agreed intentions and actions of each party. Global Chapter Programs will conduct appropriate follow-up to encourage timely participation. However, if either party fails to respond or does not sign the Agreement to Mediate within ten (10) calendar days, the matter will be considered closed, and all parties, will be formally notified.

After assessment and review of the Conflict Report, a member from PMI’s Global Chapter Programs Team will debrief the assigned Chapter Partner of next steps.

After receiving the signed Agreement to Mediate from both parties, Global Chapter Programs collaborates with **Culture & Diversity** to assign a trained volunteer Conflict Mediator, selected based on location, experience, and the nature of the conflict.

Successful Mediation begins with preparation. Both parties are encouraged to reflect on their goals, understand the Mediation process and cadence, and envision future-focused outcomes that support not only their individual needs but also the well-being of the chapter.

2.4.5 Mediation

Once the Agreement to Mediate is signed, the process transitions to a structured, facilitated engagement led by a PMI-trained volunteer mediator. Depending on the nature of the dispute, Mediator may meet with both parties at the same time or individually.

Preparation and Expectations

- The mediator meets individually with each party to explore interests, boundaries, and expectations.
- Parties reflect on their ability to represent themselves, consider the other party’s perspective, and think about what outcomes would benefit their chapter.
- Sessions are typically virtual and scheduled over multiple weeks based on participants' availability.

Opening Session

- The mediator outlines the Mediation structure (format, frequency), confirms participation in good faith, and sets community guidelines.
- Each party presents an opening statement—prepared with support from the mediator—focusing on facts, desired outcomes and their impact on the chapter
 - The initiator of the Mediation’s statement should include facts about events and issues as well as what actions or outcomes would resolve the situation.
 - The Disputant’s statement may be concerned with their own understanding of the facts and issues, feelings, and reasons for being willing to enter Mediation.
- The mediator helps to document key themes and ensures a respectful, clear dialogue.
- Both parties should aim to explain how the outcomes are responding to the best interests of their Chapter.

Issue Identification and Negotiation

- Participants define and prioritize the key issues to be resolved.
- The mediator guides the parties to explore the interests behind those issues.
- The group co-creates solutions focused on the future, including behaviors, actions, or agreements that address mutual interests and are acceptable for both parties.
- Negotiation may span multiple sessions, and the mediator records outcomes between meetings.
- Confidential caucus sessions (1:1) may be used to support deeper reflection or explore sensitive options.

Agreement and Closure

- Once consensus is reached, the mediator helps draft the Dispute Resolution Agreement, (also known as the “Agreement”) capturing commitments in the parties’ own words.
- Solutions should follow the SMART framework (Specific, Measurable, Achievable, Relevant, Time-bound).
- The Agreement is signed by all parties and the mediator, then submitted to Global Chapter Programs for recordkeeping.

At this point, the Mediation concludes unless a follow-up meeting is scheduled as part of the Agreement (see 2.4.6 Dispute Resolution Agreement for next steps).

2.4.6 Dispute Resolution Agreement

At the conclusion of the Mediation process, the parties will finalize a written Dispute Resolution Agreement with the support of the mediator. This Agreement is not legally binding, but it represents a mutual commitment to implement the agreed solutions in good faith.

- Once all parties have received and signed the Agreement, and if no follow-up meeting is included, **the Mediation process officially ends**. The mediator will provide written confirmation of closure.
- If either party requests a **follow-up meeting**, it must be mutually agreed upon and included in the final Agreement with a scheduled date and time.

2.4.7 Post-Agreement Action

If a follow-up meeting is included in the Agreement:

- The mediator will organize the meeting and may check in with the parties beforehand to clarify topics for discussion.
- During the meeting, parties should review progress and determine whether the agreed solutions have been fully or partially implemented to their satisfaction.
- If progress is deemed satisfactory, no further action is required.
- If the solutions have not been fully met, parties may agree to extend the implementation period. However, only one follow-up meeting is included in the Mediation process, and the mediator will not schedule additional follow-ups.

All parties are responsible for executing the Agreement. The mediator’s role does not include enforcement, but they may facilitate discussion on progress if needed.

2.4.8 Ending the Mediation

Mediation can conclude in three ways. In all cases, participants will receive written confirmation from the mediator that the process has ended.

- **Without an Agreement.** Any party may withdraw at any time. Since Mediation is a voluntary process, the process cannot continue without full engagement. Neither PMI nor the mediator will force anyone to participate in Mediation, even if the process has already started. If all parties agree that resolution is not possible, they may choose to proceed to **Arbitration**, provided they have made a good faith effort to mediate.
- **After Signing the Agreement.** If no follow-up meeting is included, Mediation ends once the signed agreement is shared with all participants.
- **After the Follow-Up Meeting.** If a follow-up meeting is included, Mediation officially ends after that session, regardless of the outcome.

Whether or not an agreement was reached, PMI Global Chapter Programs welcomes feedback from participants on their experience with the process.

Please contact the PMI Global Chapter Programs team with any questions, comments or suggestions at chapterconflict@pmi.org

2.5 Phase Four – Arbitration

The objective of the Arbitration Phase is to provide a final resolution pathway for Disputes that remain unresolved after Mediation. This phase involves an external, third-party arbitrator who will review the case and issue a binding decision.

Unlike Mediation, where resolution is reached through mutual agreement, arbitration is an **Alternative Dispute Resolution (ADR)** method in which an impartial arbitrator renders a final verdict based on the evidence presented. This process allows parties to resolve their Dispute outside of legal court proceedings. If a Dispute is not resolved after duly following the procedures outlined in Phases 1 through 4 of the Chapter Conflict Management Program, both parties may mutually agree to request an Arbitration.

For Disputes involving parties within North America, arbitration shall follow the rules of the American Arbitration Association (AAA). For Disputes outside of North America, the International Center for Dispute Resolution (ICDR) will apply. Disputants are encouraged to review and understand the rules and procedures of the applicable arbitration body to ensure they are fully aware of their rights and responsibilities.

Arbitration is initiated and managed by the Disputants themselves. PMI is not involved in the arbitration process but requests to be kept informed of the outcome. Disputants are responsible for selecting an arbitration provider, registering for the service, and covering any associated costs.

This phase is intended as a last resort, used only when all previous efforts within the Chapter Conflict Management Program have been fully explored and no resolution has been achieved.

2.6 Roles and Responsibilities

- **Global Chapter Programs Team**
 - **Manager, Global Chapter Programs:** The manager from the Global Chapter Programs team is responsible for Program Oversight; Conducts assessments of Chapter Disputes. May act as, or part of, the Governing Body.
 - **A member from the Global Chapter Programs team** is designated as a subject matter expert and Program Owner; Receives and conducts initial assessment of chapter Disputes; point of contact for Regional Team.
- **Culture and Diversity:** Provides coordination and support for Conflict Mediators, focusing on aligning the program with PMI’s cultural values and DE&I principles. Leads training and awareness efforts centered on interpersonal relationships, inclusion, and values-based behavior to help prevent conflict. Collaborates with Global Chapter Programs on program evolution and fosters community and shared learning among Mediators.
 - **Conflict Mediators (“Mediators”):** Volunteers who reside in the specified PMI region and serve a two-year term; Serve as a neutral third party trained in conflict Mediation to assist parties in reaching mutually agreed-upon resolution to Disputes; Works closely with the Culture & Diversity Team.
- **Global Chapter Engagement:** Chapter Engagement Partner, Chapter Manager/Regional Head of Community and Region Mentor (“Chapter Partners”). Primary contact for dealing with any concerns related to chapter business. Provides region updates and suggested Program opportunities to the Global Chapter Programs Team.

2.7 Program Oversight

PMI’s Global Chapter Programs team has overall responsibility for the Conflict Management Program including policy, program development, and evaluation. PMI’s Global Chapter Programs, with consultation from PMI’s Legal Department, shall resolve any Disputes regarding the interpretation and applicability of these procedures.

3. COMPLAINT RESOLUTION

The intention for the Complaint Process is for general purposes only and should serve as a foundational framework for PMI Chapters to develop a complaint policy. It is imperative that during the policy creation process, careful consideration is given to relevant legislation, and it is suggested legal counsel is consulted to ensure compliance.

3.1 Chapter Complaints

Chapter Complaints are issues involving chapter operations, governance, policy, actions, or procedures, which should be resolved at the chapter level, with the chapter board having final authority.

An individual (member or non-member) may submit a Chapter Complaint about an issue that they are raising to the Chapter to address. Complaints can include issues with:

- Chapter governance and operations
- Chapter events and programs
- Interactions with chapter leadership and volunteers
- Chapter policies and procedures. (Including Chapter nominations/elections, volunteering responsibilities, etc.)

Example scenarios that might prompt a chapter related complaint:

Policy related:

- Board candidate allowed on the slate, who did not meet qualification requirements.
- Nomination committee did not follow policy procedures when shortening the submission period.

Operations related:

- System downtime impacting member registration.
- Event speaker swapped out without notification or option to unregister.

Interactions related:

- Disruptive behavior impacting a chapter event or meeting.

Please note the above-referenced list of examples is not exhaustive and does not include all possible scenarios.

3.2 Process Flow

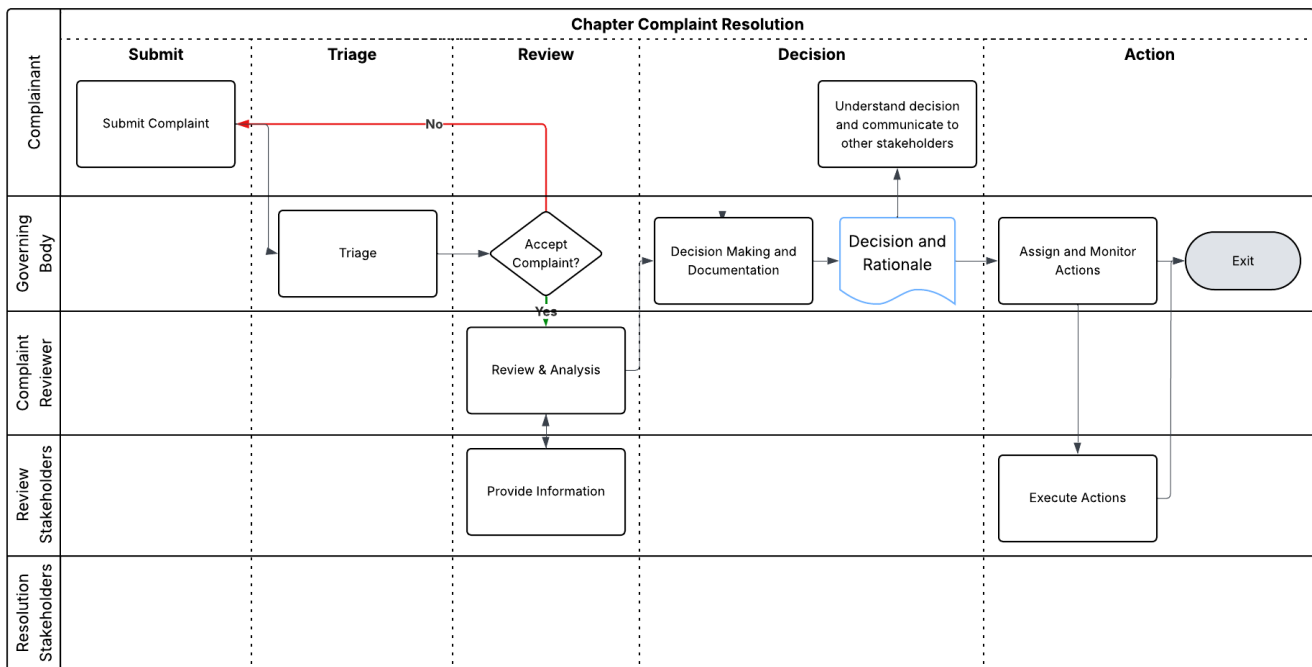


Figure 5 - Suggested Complaint Resolution Process

| Phase | Description/Outcomes | Responsible |
|-------------|--|--|
| 1. Submit | Complaint submitted to chapter leadership. | Complainant |
| 2. Triage | Initial review, triage, accept/reject & assign Complaint Reviewer. | Governing Body |
| 3. Review | Review complaint, engage stakeholders for information, analyze resolution recommendations, and provide analysis to Governing Body. | Complaint Reviewer & Review Stakeholders |
| 4. Decision | Make decisions and assign resolution/outcome actions. Communicate to impacted stakeholders. | Governing Body |
| 5. Action | Execute and monitor resolution actions. | Resolution Stakeholders & Governing Body |

3.3 Stakeholder Roles & Responsibilities

- **Complainant:** Responsible for submitting to Chapter Leadership a clear and concise summary of complaint with evidence support claims.
- **Governing Body:** Confirms completeness of complaint submission, triages complaint to ensure proper approach processing, assigns Complaint Reviewer, makes decisions and assign resolution actions.
- **Complaint Reviewer:** Appointed role by the Chapter Board/Leadership to review Chapter Complaint submission, gather information, and provide analysis to the Governing Body for decisioning and resolution actions.
- **Review Stakeholders:** Individuals, organizations, or other stakeholders engaged by the Complaint Reviewer in analysis of complaint.
- **Resolution Stakeholders:** Individuals, organizations, or other stakeholders responsible for outcomes and resolution actions.

3.4 Authority

All filed Chapter Complaints and determinations are reviewed and approved by the Chapter Board and filed in accordance with the chapter policies and records management procedure. If no formal policies exist, the Board should apply a consistent and reasonable approach aligned with the chapter’s standard practices for documentation and decision-making.

3.5 Professional Conduct

During the review of the Chapter Complaint, it is imperative that all parties conduct themselves with respect and professionalism. Maintaining a courteous and cooperative demeanor fosters an environment conducive to finding a satisfactory resolution. Any interactions, whether verbal or written, should reflect a commitment to constructive dialogue and mutual understanding.

4. DEFINITIONS

Agreement to Mediate: Is a **formal written document** signed by both parties in a dispute who agree to resolve their conflict through PMI's Chapter Conflict Mediation process rather than litigation or other adversarial processes.

Alternative Dispute Resolution: Decision making processes to resolve conflicts that do not involve litigation, or formal equal employment opportunities (EEO) complaints, formal grievances, or disciplinary actions.

Chapter Dispute: Disagreement or ongoing disruptive behavior among two PMI chapter volunteers that require intervention.

Chapter Leader(s) or Chapter Leadership: Chapter President, and/or a Chapter board member, and/or a past Chapter Leader.

Common Courtesy: When you agree to mediate using common courtesy, you agree not to interrupt another speaker, and to avoid using inflammatory language.

Complaint: A conflict situation that an individual (the complainant) formally raises to chapter leadership for resolution.

Complaint Reviewer: Chapter President, a Chapter board member or an experienced Past Chapter Leader; may also be Chapter Complaint Owner.

Complainant: An individual that submits a complaint to Chapter Leadership for a resolution.

Conflict: Chapter conflicts are classified across 2 types: Complaints or Disputes. Complaints are filed by a complainant related to either chapter operations, events or interactions with other individuals. Disputes deal with 2 volunteers that are engaged in disruptive behavior that requires intervention/guidance to resolve.

Dispute: A conflict situation between two PMI Chapter volunteers who are unable to resolve without intervention.

Dispute Resolution Agreement ("Agreement"): When all or part of the issues in Dispute have been resolved to the mutual satisfaction of the parties the agreements reached are written down and signed by the parties and mediator.

Disputant: Individual involved in an ongoing Dispute. The person(s) with whom the Initiator wishes to negotiate in order to resolve the issues in the complaint or Dispute and has been named in a [Chapter Conflict Report Form](#) ("Conflict Report").

Facilitator: Chapter President, a Chapter board member, or an experienced past Chapter Leader.

Governing Body: Authority responsible for overseeing or regulating the subject matter of a Chapter Complaint. They may be the Chapter Leaders, Chapter Board of Directors, or a Board appointed team/committee of chapter volunteers.

Good Faith: All Mediation participants are required to agree to mediate in “good faith.” That is, they must agree to (1) listen to all sides of a Dispute, (2) share all pertinent information, (3) keep an open mind and not maintain a fixed negotiating position, (4) explore their and the opposing sides’ interests, and (5) help develop options that meet the interests of all parties.

Initiator: The person who requests Mediation services to help resolve a Dispute.

Interest: A concern, need, or desire behind an issue—why the issue is being raised.

Interest-based Mediation: A process that seeks to discover and satisfy the underlying interests of parties rather than to meet the stated positions or demands that they bring to negotiation. Also known as win-win negotiation.

Issue: A subject under discussion or negotiation; the “what” or problem which needs to be solved.

Mediation: A structured Dispute resolution process in which a person or persons with no interest in the outcome of the conflict assist the Disputants in reaching a negotiated settlement of their differences. The Mediation process is voluntary and aims at a signed Dispute Resolution Agreement defining future behavior of the Disputants. The mediator helps parties communicate, negotiate, and reach agreements but is not empowered to render a decision.

Mediator: A mediator serves as a trained neutral third party and impartial facilitator of the structured process referred to as Mediation. The mediator does not make decisions for the parties and does not impose a resolution to the Dispute. The mediator does not serve as an arbitrator or judge of the facts of a case and does not advocate for any side in the Dispute. The mediator helps the parties explore their interests and develop options towards a mutually satisfactory resolution of the issues.

Solution: A potential option that can meet one or more interests.

Subject Matter Expert (“SME”) - Individual(s) or Volunteer(s) who have extensive knowledge with Chapter Governance and strong knowledge of chapter operations and PMI chapter tools and resources.

5. APPENDICES: GUIDELINES, FORMS AND AGREEMENTS

5.1 Appendix A: PMI Chapter Conflict Management Program Agreement to Mediate

PMI CHAPTER CONFLICT MANAGEMENT PROGRAM AGREEMENT TO MEDIATE

The Parties to this Mediation Agreement (“Agreement”) are _____, _____, and _____, _____. The Parties desire to use a Mediator to assist them in resolving a Dispute relating to the _____ **Chapter**. The parties are willing to enter into this Agreement to Mediate pursuant to Project Management Institute’s (PMI) Mediation Process, and each agrees as follows:

In consideration of receiving Dispute resolution services from [PMI’s Chapter Conflict Management Program](#), I agree to enter into this Mediation (“Mediation”) in good faith.

I will sincerely attempt to resolve this Dispute, agree to cooperate with the Mediator assigned to this case, and give serious consideration to all suggestions made, for the sake of developing a realistic solution to the problem.

I confirm that I have read [PMI’s Chapter Conflict Management Program](#), in particular Section 2.4.5, Mediation Process, and agree to mediate pursuant to both.

I understand that the Mediator assigned to this case will not be serving as an advocate, attorney, or judge. The Mediator’s sole function is to act as a neutral facilitator. Any agreements or decisions resulting from this Mediation session are entered into voluntarily and by mutual acceptance of the parties.

I agree that Mediation sessions are confidential and that all offers, promises, conduct and statements, whether written or oral, made during proceedings are inadmissible in any litigation or arbitration of this Dispute, to the extent allowed by law. However, matters that are admissible in a court of law or other administrative process continue to be admissible even though brought up in a Mediation session.

PMI, its employees, agents, representatives, including but not limited to Chapter Volunteers acting as Mediators, shall not be liable for any act or omission in connection with the Mediation.

I also agree to not subpoena or require the Mediator to testify or produce records, notes, or work product in any future proceeding(s) and that no recordings or stenographic records will be made of the Mediation session.

I have read, understand, and agree to each of the provisions of this Agreement.

Signature: _____

Date: _____

5.2 Appendix B - Mediation Guidelines, Tips and Advice

General

- All participants are expected to conduct themselves with professionalism and respect throughout the Mediation process. Maintaining a courteous and cooperative demeanor fosters an environment conducive to constructive dialogue and mutual understanding.
- PMI uses an interest-based Mediation model. This model seeks to move people experiencing conflict towards a win-win mindset by creating mutual agreements that meet the needs and goals of all parties, including the wider chapter.
- PMI Volunteer Mediators are neutral facilitators—not arbitrators, judges, or advocates. They guide parties through a structured, confidential process focused on uncovering underlying interests and co-developing solutions.
- Depending on the nature of the dispute, Mediator may meet with both parties at the same time or individually.
- As a participant in the Mediation process, each party's role is to mediate in good faith, using the principles of common courtesy. Mediating in good faith means participants are willing to listen to the other party's perception of the Dispute, maintain an open mind and consider any options for resolution, be willing to negotiate without holding to a fixed position, and be willing to share all relevant information.
- PMI Chapter Conflict Mediation is a fully remote process conducted virtually unless otherwise agreed.
- While each case may vary, the Mediation process is expected to reach resolution within 60 calendar days from the date the Conflict Report is received.

Pre-Mediation

- **Reflect before engaging.** Much of what makes Mediation successful happens before the parties meet. Know your goals, think about the chapter's broader needs, and visualize what a successful resolution looks like.
- **Approach with openness.** Mediation isn't about proving who's right and is not about winning—it's about finding a working resolution to move forward. Prepare mentally and emotionally for compromise. Mediation's fundamental principle is self-determination.
- **Understand the Agreement to Mediate.** Signing this non-binding agreement is a commitment to engage respectfully, in good faith, and with confidentiality. It sets the tone for the process.
- **Ensure the right people are involved.** The process is only between the two core parties in conflict. Others may be consulted if their input is required for resolution, but they won't be in the session.
- **Represent yourself.** No representatives or companions are allowed. If someone else joins, the session will be paused and rescheduled.
- PMI's Global Chapter Programs and Culture & Diversity teams support the process by reviewing submitted reports, assigning a mediator, and tracking procedural progress. However, they do not participate in the actual Mediation session.

Mediation

Technical & Setup Tips

- **Check your tech.** Use a reliable device (preferably a desktop), a stable connection, and test your access to the meeting link ahead of time.
- Mediations usually take 1-3 hours but can vary due to other circumstances. The mediator will discuss timing and availability with all parties.

- **Create the right space.** Join from a quiet, private location with necessary materials (notes, documents, water, etc.).
- **Recording or transmission of the Mediation is not allowed.** Any attempt to record will result in immediate termination of the session. Both parties will receive confirmation in writing that Mediation has ended due to recording / transmission.

During the Sessions

- **Use your opening statement wisely.** Share facts, desired outcomes, and how the situation impacts the chapter. Avoid attacking the other party.
- **Be transparent with the mediator.** Their goal is to help you reflect and find constructive options—not judge your experience.
- **Practice active listening.** Practice active listening and respectful communication. Use respectful language, avoid inflammatory terms, interruption, or assumptions. Stay focused on the issue, not the individual. Take notes to support thoughtful responses.
- **Stay future-focused.** Don't rehash the past—collaborate on workable, sustainable solutions that benefit all parties.
- **Focus on shared goals.** Mediation is about collaboration and building workable, forward-looking solutions.
- The mediator may ask clarifying questions about proposed solutions and help each party reflect on their comfort with them. This exploration is critical in identifying workable resolutions.
- **Work with the SMART framework.** Aim for agreements that are Specific, Measurable, Achievable, Relevant, and Time-bound.
- **Be open to creative options.** The best solutions often come from exploring new ways to meet shared interests—be flexible.
- **Use caucus time wisely.** Confidential one-on-one sessions with the mediator are for honest reflection and problem-solving—be open.
- **Respect timing.** Sessions may be scheduled outside regular work hours but avoid late evenings to ensure focus and energy from all parties.

Agreement

- **Review the agreement carefully.** Make sure it reflects what you agreed to—use your own language and ask questions if anything feels unclear.
- **One follow-up only.** If you need a follow-up meeting, request it before closing Mediation. Only one is included in the process.
- **You own the outcome and implementation is your responsibility.** The mediator won't track progress. Stay committed to following through on your part.
- **Be honest in follow-up.** Use that meeting (if scheduled) to check in realistically. If things aren't working, talk about how to adjust—but know that no additional follow-up will be facilitated.

Post-Mediation

- **Mediation ends in three ways:** with agreement, after the follow-up meeting, or if a party withdraws. In all cases, you'll receive written confirmation.
- **Your voice matters.** Whether you reached agreement or not, PMI welcomes your feedback. Share your experience to help improve the program.