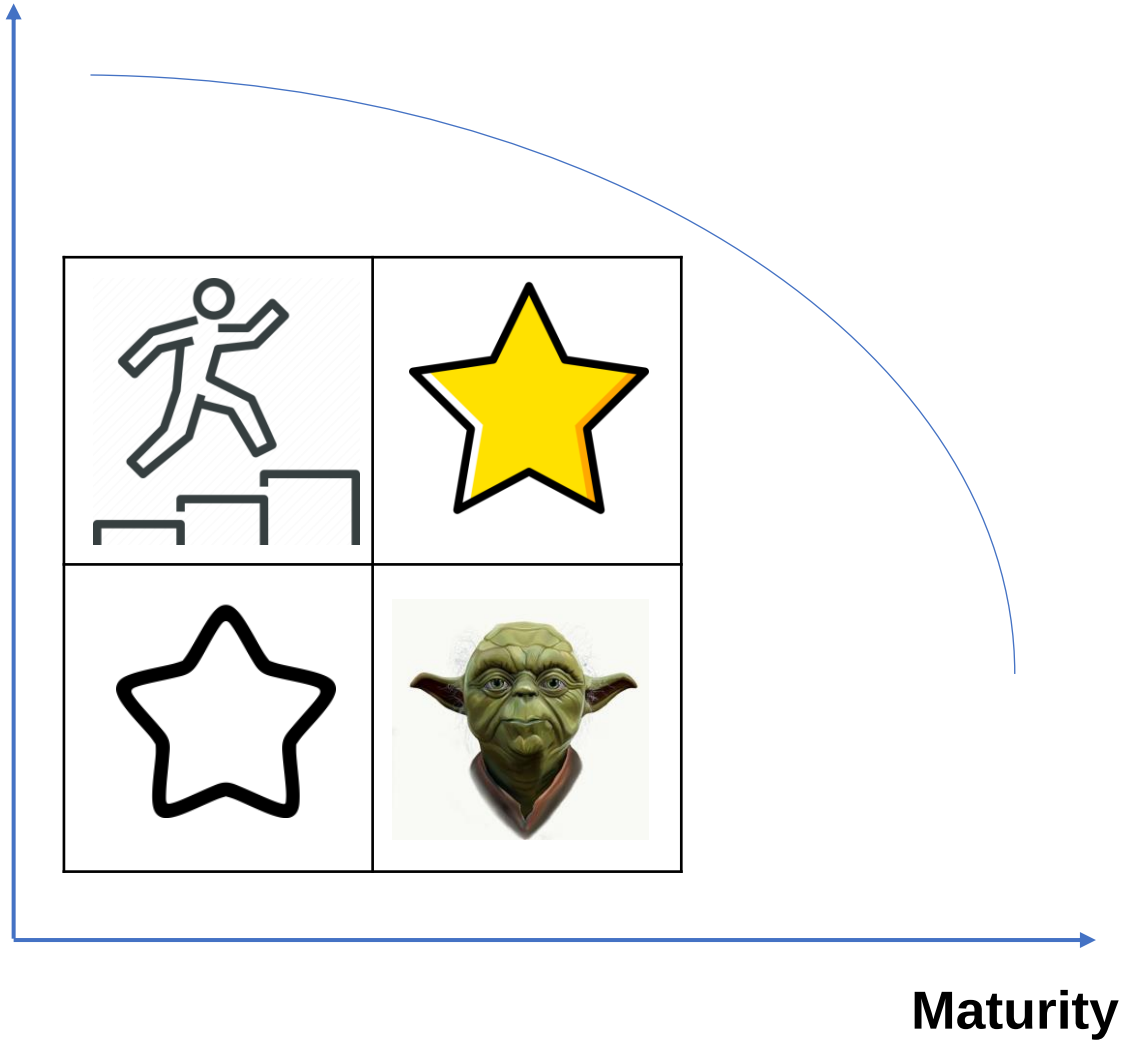


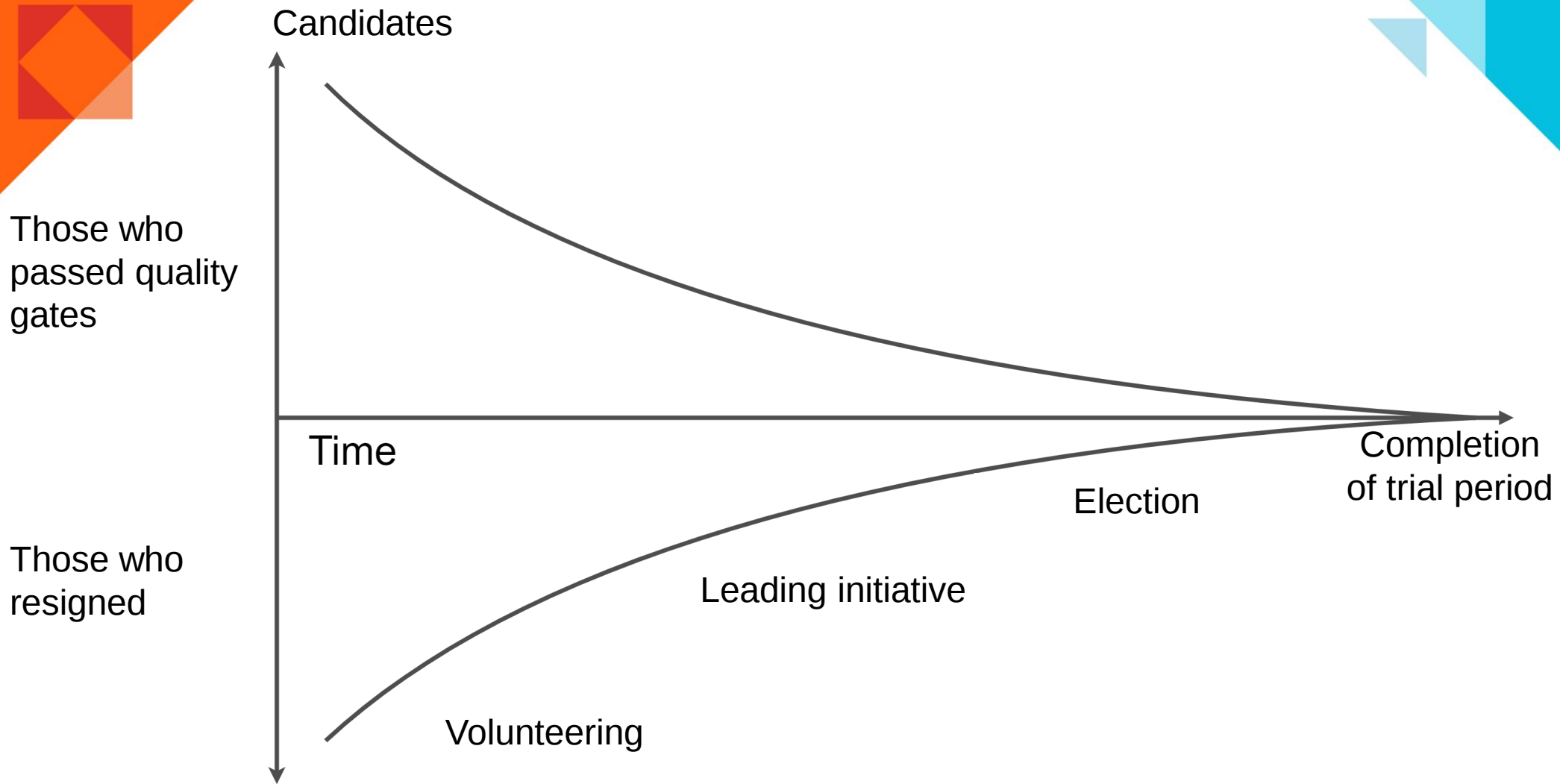
Navigating Leadership Transitions

Roman Reznikov



Motivation to contribute







Active Volunteering

Activities:

Take part in
several initiatives
Take leadership
role in at least
one large
initiative

At least 1 year

Board Trial Period

Activities:

Pilot role of
leading or co-
leading one of the
streams in Board
Lead few large
programs or
initiatives

6 months

Election Campaign

Activities:

Form list of plans
and goals for
board period
Present them to
community
Answer questions
from the audience
and healthy
debate with
opponents

1 months

First Year of Service

Activities:

Perform
commitments
according to
agreed plan
Report to
community
regarding the
progress and
collect a feedback

1 year

Second Year of Service

Activities:

Take new initiatives
Start looking for
new board
members and
potential substituors

1 year +

*Can be prolonged for another
2 years*

Make Sure New Leaders Share PMI Culture

Make It Easy

We are easy to deal with.

When things slow us down, we find a better way.

We prioritize the impact that matters most and take the most direct route to it.

Aim Higher

We set the standard in top quality work to create the greatest impact for the PMI community.

We lead the way by thinking long-term and acting in the short-term.

We fearlessly take ownership of what we do, knowing every action counts.

Be Welcoming

We create genuine belonging for all, because our differences make us stronger.

We act with humanity, showing care, empathy and respect for others' needs.

We assume good intent and seek to understand, not judge.

Embrace Curiosity

We are always seeking ways to better serve the PMI community.

We see challenges as opportunities to innovate, and take them.

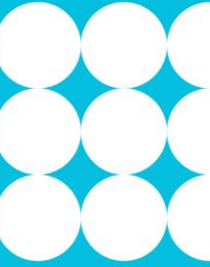
We feel able to fail fast in order to get it right.

Together We Can

We build deep, trusting relationships that help us work towards our mission together.

We use our shared purpose to unite us as a community and drive us forward to create impact.

We act in alignment with our global goals, while being empowered to deliver locally.



**Share The Main Challenges
During Your Onboarding!**





Joint Retrospective Of Previous Year



PMI Ukraine Plan 2021

Board

Board

Ideas

- Create, discuss and approve Chapter Budget 2022
- Create Finance Management Policy
- Mentorship Program
- PMI Ukraine Journal
- Update Ukrainian wiki related to project management
- Presentation about PMI Ukraine for external stakeholders (state and

To Do

+ Add a card

In Progress

- Automate communication with PMI members
- Communication letters PMI Ukraine
- Initial transfer of financial and legal routines from previous President. Understanding context and limitations, relations and responsibilities with PMI Headquarter

Done

- Annual conference PMI Ukraine
- Project Management course for Zhytomyr
- PM course for UCU
- PMI Ukraine Chapter Board communication about
- TOP Ukrainian projects - dedicated to 30 Anniversary of Ukraine
- PMI Ukraine Chapter YouTube

Ongoing activities

- Monthly PMI Ukraine webinar for members
- Annual chapter renewal (PMI system, March)
- Annual tax report
- Business insurance from PMI (once a year)
- Social media maintenance
- IT Infrastructure

Joint PMI Annual Planning

The screenshot displays the Chapter Collaboration Platform interface. The top navigation bar includes links for Home, Calendar, Chats, Chapter, Documents, Communities, New/Coming Soon, and Support. The 'Documents' section is active, showing a list of documents on the right and a sidebar on the left with categories like PMI Volunteer Resources, Chapter Working Groups Resources, and Resource Links.

The sidebar on the left shows a tree structure under 'Documents' > 'OLC'. The 'Annual Planning & Catalog of Core Services' folder is highlighted. An orange arrow points from this folder to the document list on the right.

The document list on the right shows three documents:

Title	Uploaded By	Modified Date
Annual Plan and Catalog of Core Services Worksheet.xlsx doc 92.5 KB Description: Each chapter is required to submit an annual plan on a yearly basis to be reviewed by the Chapter Partner.		18 Dec 2020 12:08:35 PM
Catalog Core Svcs Video.mp4 video 31.1 MB Description: Each chapter is required to submit an annual plan on a yearly basis to be reviewed by the Chapter Partner.		18 Dec 2020 12:16:46 PM
Chapter Leader Guide - Annual Planning pdf 11.9 MB Description: The purpose of this guide is to provide chapters with a consistent and focused approach to the annual planning process.	Michael Liddy	03 Aug 2022 09:54:42 AM

Operational Transition

- ☐ PMI Chapter Formation, Reorganization & Processes
- ☐ Charter Renewal
- ☐ Bylaws/Governance
- ☐ Administer Electronic Elections, Surveys, Taxes & Insurance
- ☐ Support New Chapter Leader with Online Community Sites, Component System (CS), and ThoughtSpot
- ☐ Connect new leaders with PMI Stakeholders

Component System (CS)

<https://components.pmi.org>

Core system for
managing the
chapter

President's
responsibility to
keep it updated

Essential communications
are sent to members listed
in Officers section

Component System :

CS Admin Home
Component Home
Chapter Location
Contact Information
Business Records
Officers
Web Service
Chapter Reporting System
Support/FAQs
Logoff

Eight Sections:

1. Component Home
2. Chapter Location
3. Contact Information
4. Business Records
5. Officers
6. Web Service
7. Chapter Reporting System
8. Charter Renewal

Welcome to this PMI component.

Logo Approved?:

☐ Yes ☒ No

Upload Logo:

No file chosen

Incorporated Name:

What is a charter?

Legal contract between your chapter as an entity and PMI as a separate entity. Describes each other's responsibilities and relationship to each other.

What are the articles of incorporation?

A legal "contract" between the chapter as an entity and the governing body that grants corporate status. In some cases, specific requirements are needed to keep this status.

Chapter Management Documents

What are the bylaws?

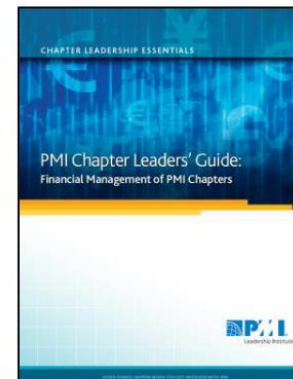
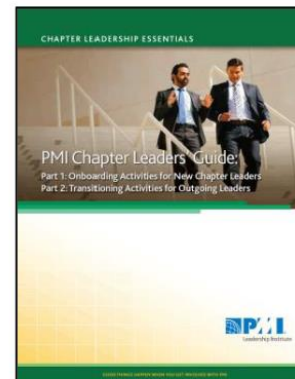
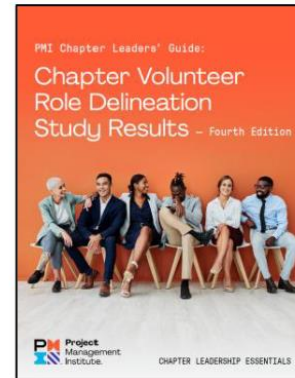
A "contract" between the chapter as an entity and its owners (the members). Provides assurance to the members that their association will be managed in their best interest. Best practice recommends revising every three years.

What is the internal policy document?

Also known as a Chapter Operations Manual, this is where we will detail all procedures and rules that are not required in the bylaws and that do not need a membership approval.

Chapter Leader Guides (in Marketing Portal and CCP):

- Annual Planning
- Chapter Academic Outreach
- Financial Management
- Chapter Nominations & Elections
- Chapter Volunteer Role Delineation Study
- Onboarding and Transitioning
- PMIEF Social Good



Management & Governance Resources

- **Policy Manual for PMI Chapters** - The policy manual is linked in the Volunteer Resource Hub. This has more in-depth information on elections, roles and chapter operations.
- **Chapter Leader Guides (CLG)** - These guides can be found on the Marketing Portal under Chapter Leader Guide and will take you through the main responsibilities of the chapter depending on your role.
- **Onboarding and Transitioning Guide** - Along with other guides, this guide provides a good indication on what you should expect during the onboarding process and how make sure it is a success.
- **Chapter Leader Orientation (CLO)** - The CLO will walk you through the main aspects of a chapter. All new chapter leaders are required to complete the CLO but it is also strongly recommended for returning ones who may need a refresher!

Management & Governance Resources

- **Chapter Volunteer Role Delineation Study** - Found on the Marketing Portal under Chapter Leader Guide, this study will help you to clarify the roles of the board members as well as defining new positions.
- **Ethics Toolkit** - Found in PMI Picks, a document to help you navigate ethical dilemmas.
- **Chapter Volunteer Resource Hub** - Linked from the PMInsight page, you will find shortcuts to everything you need to access.
- **Your Chapter Engagement Staff** - This team is here to support you and guide you in your journey.

Chapter Leader Global & Regional Orientation Webinars

Orientation webinars are presented by the Chapter Engagement support staff in the beginning of each year to provide an overview of the chapter leader's world and the resources available to you in your region.

Chapter Leader Orientation - CLO - eLearning

orientation.pmi.org

eLearning courses available on demand help you learn all about PMI and being a leader. There are also courses based on specific roles in chapters, with more being added each year.

Chapter Board Onboarding process

The chapter should also have an onboarding process to introduce new leaders to the tools and responsibilities needed to effectively fulfill your role.

Together We Can

Let's Discuss!

2023 Europe Leadership Institute Meeting



Navigating Leadership Transitions

3 December 2023 | 15:00 – 15:45

Scan the unique QR code with your mobile device or use the URL to note your attendance.

By signing in, we will report PDUs on your behalf. You will receive PDUs based on session attendance and sign-in. Please allow 21 business days for the process to complete.

Questions? Email leadership.institute@pmi.org

Sign In Now!

