Summary of PMI Chapter Reorganization Interest Form

Note: This is not the actual form, but is intended as a summary to provide insight into the information that will be required for PMI to process a reorganization request. Please review this summary prior to undertaking completion of the actual form, as it will guide you in your preparation of the business case for reorganizing to become a chapter with branches.

This form may only be completed by current members of the existing chapter's leadership, as reorganization of a chapter must be done with the approval of the chapter's Board of Directors.

The interest form must be completed for all requests to reorganize as a chapter with branches. Submission of the form is required by PMI prior to undertaking the next steps in the formation process. Please note that PMI will evaluate all reorganization requests and submission of the interest form does not guarantee the reorganization of the requested chapter. For more information about chapter reorganization, please send your inquiry to communityformation@pmi.org.

Section 1: Contact Information

- Name of the inquirer
- Member ID number
  - Non members may submit but will not be prioritized for formation until/unless the inquirer joins PMI.
  - Please make sure this is the member ID and not a credential ID.
- Mailing address
- Email address
- Primary and alternate phone numbers

Section 2: Chapter Leadership Information

This information is requested in order to help PMI verify that the request is submitted by a current member of the existing chapter's leadership and provides insight into additional volunteer experience which may be beneficial to this effort.

- Confirm leadership approval to reorganize as a chapter with branches
- Existing chapter's name
- Position currently held by inquirer
- Summary of previous volunteer experience
  - This may include non-PMI volunteer experience, as well as Institute level roles held, or other PMI community roles held.

Section 3: Chapter Reorganization Proposal
This section outlines the business case for forming a new PMI chapter. Answers need not be detailed but should include enough information to help PMI understand the needs in the area and demonstrate why a new chapter is the best solution for meeting these needs.

- Indicate if chapter name will be changing
    - Yes or No
- Proposed new chapter name (if answer to question above is "Yes")
    - Follow "PMI XXX Chapter" naming convention.
    - Select a name representative of a recognizable geographic location.
- Describe the current area of operation
    - Use specific geographic terms: city, state, province, zip or postal codes, etc.
- Select Macro-Region
    - Select from drop-down list: Asia Pacific, EMEA, Latin America, or North America
- Indicate if the chapter proposing to change its area of operation
    - Yes or No
- Describe the proposed change to the area of operation (if answer to question above is "Yes")
- List key stakeholders, including other PMI chapters, REPs, organizations, government agencies, and academic/educational institutions
    - Existing stakeholders
    - Stakeholders that would benefit from a branch structure
- Describe the proposed chapter's focus
    - Think of this as the chapter's mission statement – what is the chapter's main focus?
- Describe the value that the chapter offers to the following stakeholder groups (in terms of the actual need that is being met – example: "Members will receive support to earn and maintain PMI credentials") ***Note: please describe how a branch structure will increase or better support value delivered
    - Members
    - Volunteers
    - Existing communities (PMI and non-PMI)
    - PMI
- Have you contacted volunteer leaders in your area to share your idea?
    - If the answer is "yes", please list the chapters contacted and describe the outcome of the discussion.
- Describe the chapter's objectives in terms of the programs, initiatives, and services that will deliver on the value descriptions listed above.
    - These should not be detailed operational plans, just simple statements to be further defined in later business planning.
    - How will a branch structure contribute to achieving these objectives

- Describe the environment of project management in the area of the proposed chapter.
  - What is the level of project management maturity in the area?
  - What are the leading industries and employers in the area?
  - List any existing competitors for the chapter in the area.
  - List any potential organizations for collaboration.
  - What is driving the need to create branches?
- List any legal, ethical, or cultural considerations that may impact chapter formation or continuing operations that PMI should be aware of.
  - What are the requirements for updating incorporation of a not-for-profit organization in your area?
  - Are there cultural implications in creating a branch structure?
- Provide a high-level overview for ensuring chapter growth and maturity over the next three years. How will the creation of a branch structure contribute to these plans?
- Identify any risks that may impact the chapter during and after reorganization of the chapter.