

Delivering M.O.R.E. in Action: Scaling Volunteer Engagement and Financial Leadership Through Structured Governance

2 May 2026 | 9:00 – 10:00₂

PMI Culture Value: Together We Can

Karen De Campos

PMI Central Italy | Director of Volunteering

Paolo Marino'

PMI Central Italy | Director of Finance

Disclaimer

- The views and opinions expressed in the following presentation are those of the individual presenter/s.
- When used, slides are protected under the copyright laws of the United States of America and other countries. Used by permission. All rights reserved. Project Management Institute and PMI are registered trademarks. All other trademarks are the property of their respective owners.
- This presentation is for registered attendees of Europe LIM 2026.

Learning Objectives

At the conclusion of this session, attendees will be able to:

- Recognize the real drivers of volunteer disengagement
- Design volunteer environments that promote ownership and leadership
- Apply practical engagement initiatives aligned with the M.O.R.E. framework
- Structure collaborative committees (including Treasury) that balance delegation and accountability
- Use financial transparency and reporting to support better board-level decisions

Key Takeaways

- **A new perspective on volunteer engagement:**

The biggest challenge is often not finding volunteers, but creating the conditions that motivate them to stay and grow

- **Practical tools to strengthen volunteer retention:**

Initiatives such as onboarding improvements, recognition programs, mentoring systems, engagement surveys, and transparent financial practices

- **A replicable model for volunteer leadership development:**

Structured governance, ownership, and collaborative Treasury committees can transform volunteers from task executors into initiative leaders.

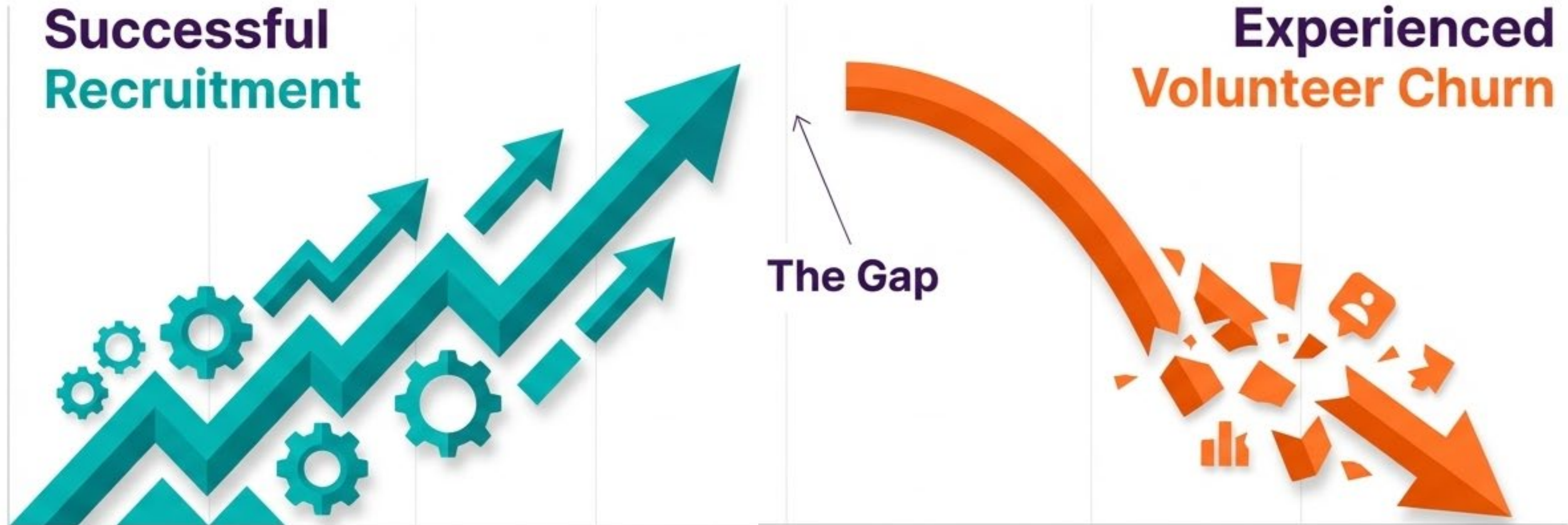
Let's talk about Volunteers Engagement

«Please find more volunteers»

«We need volunteers urgently!»

.....

The Continuity GAP Reveals a Crisis of Ownership



Recruitment and onboarding are highly effective across chapters.

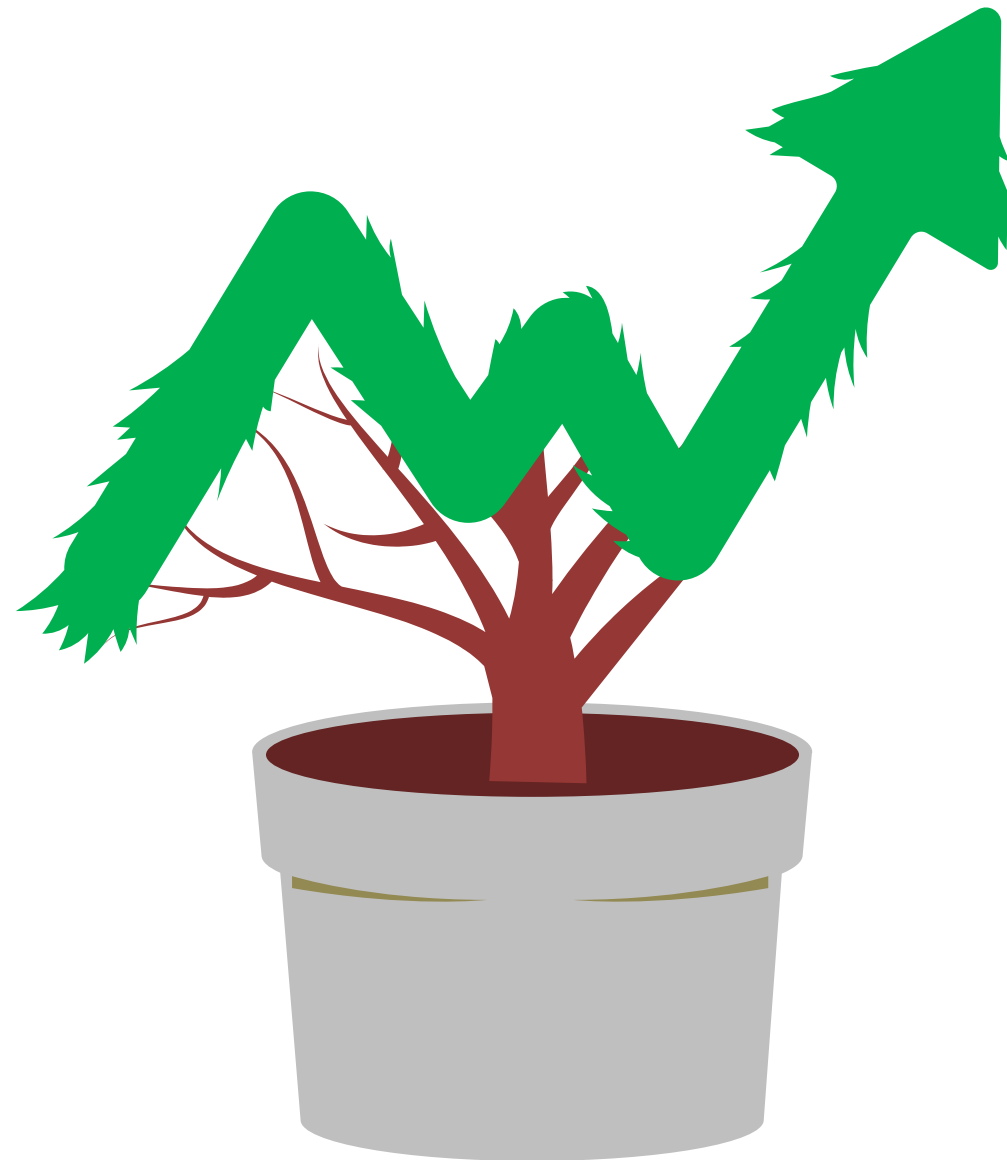
Yet, **experienced volunteers** frequently disengage after just one or two leadership cycles.

The Root Cause: The absence of ownership visibility, decision-making space, and perceived impact beyond simple task execution.

Redefining Engagement: from task delegation to Outcome ownership

The Old Way

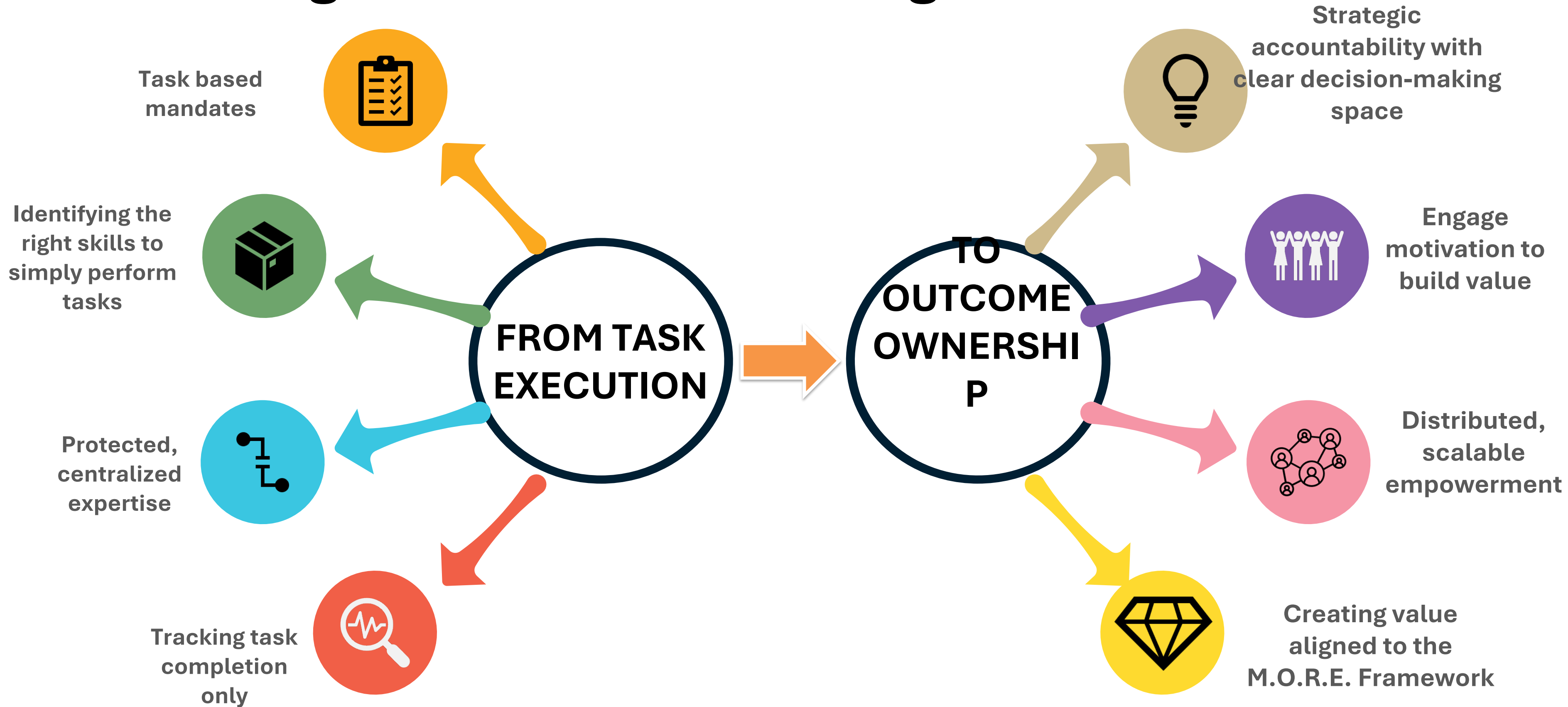
Task-based contributions with limited visibility. Compliance functions as rigid control leading to a single point of failure (the solo volunteer bottleneck).



The new way

Clear decision-making space and value creation. Compliance functions as freedom (structured trust) with a distributed, self-organized systems. Deliberate leadership outcomes resulting in continuity.

Redefining the Volunteer Paradigm



Building Identity and Lowering Barriers to Entry

AWARENESS



Strategy: Monthly informative campaigns demystifying volunteering for non-members.

IDENTITY



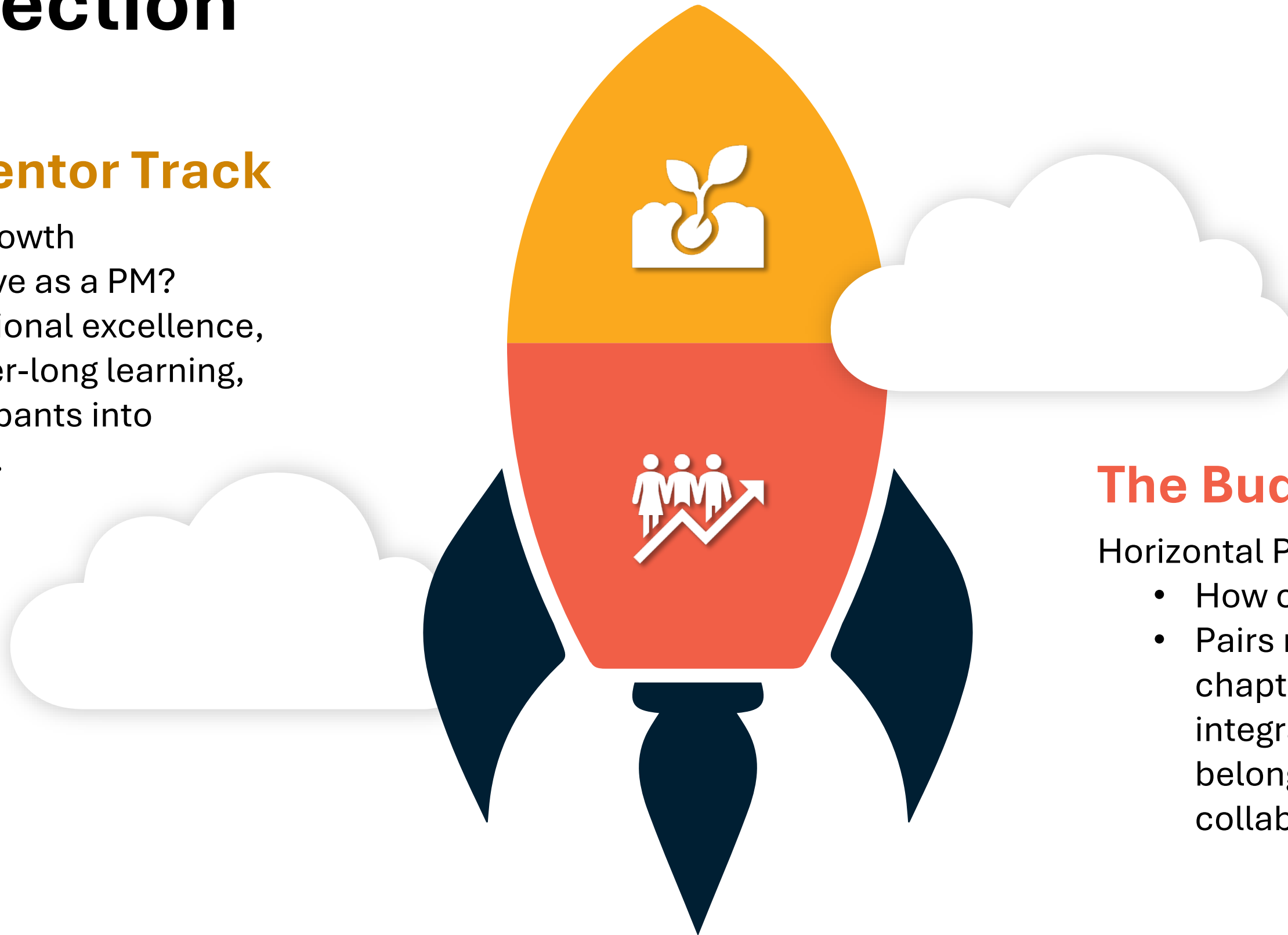
Strategy: Tangible, visible recognition of contribution.

Two paths to integration: Scaling Knowledge and Connection

The Mentor Track

Vertical Leadership Growth

- How can I improve as a PM?
- Elevates professional excellence, focuses on career-long learning, and turns participants into initiative leaders.

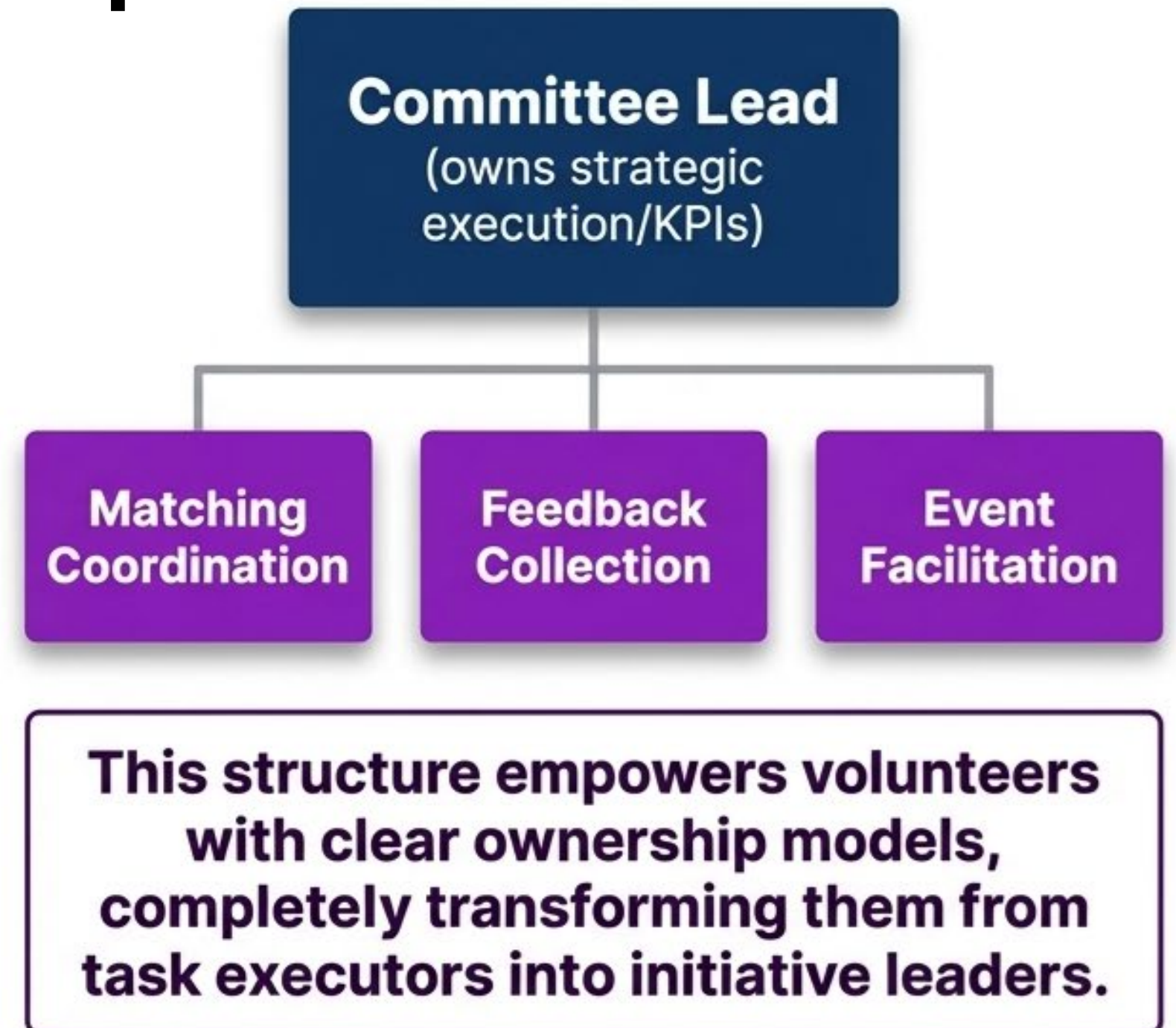


The Buddy System

Horizontal Peer Integration

- How can I collaborate?
- Pairs new arrivals with expert chapter buddies to accelerate integration, build a sense of belonging, and form lasting collaborations.

Scaling knowledge through Engineered Mentorship



Mapping the Dynamics: moving from leadership assumptions to concrete evidence

- Involvement & Motivation**
- Role Clarity**
- Perceived Impact**
- Collaboration**



Measurement Goals

Assessing baseline energy levels

Evaluating understanding of responsibilities

Measuring the value of their contribution

Tracking cross-committee communication



Leadership Insights

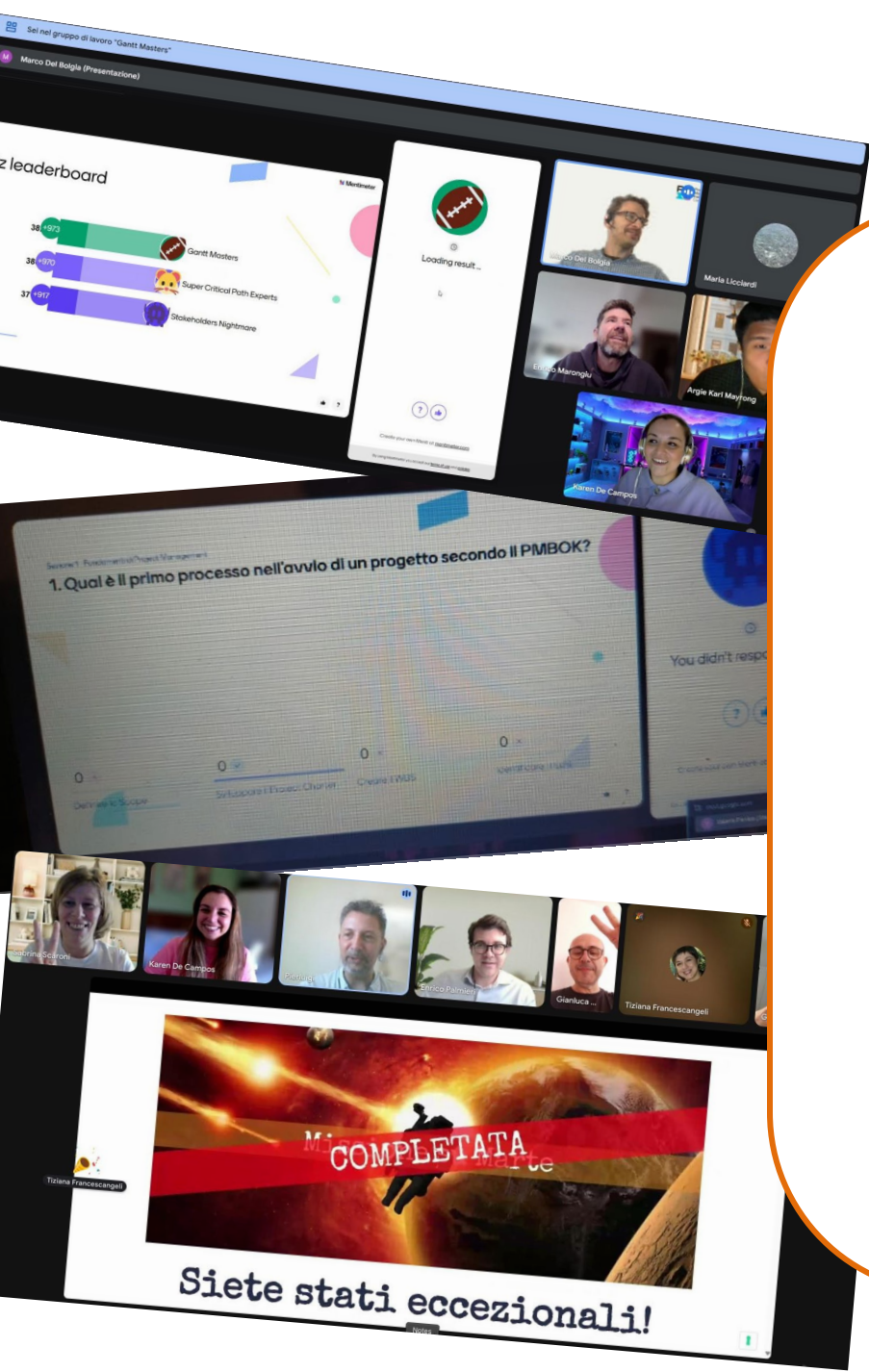
Identifies burnout risks or disengagement early

Highlights GAPS in onboarding or leadership communication

Reveals whether volunteers feel their time is actually making a difference

Flags lingering operational silos or friction points

Team Buildings: a Balanced Ecosystem of Connections



Virtual Interactions

- Scalability:** Easily deployed online games, quizzes and collaborative challenges
- Accessibility:** Low barriers to entry ensures continuous engagement
- Cross-Functional Linkage:** Breaks operational silos by mixing volunteers accross different committees/branches

In-Person Interactions

- High-Impact trust:** Experiential activities that forge stronger emotional connections
- Milestone recognition:** Dedicate physical spaces to celebrate major achievements and shape purpose
- Cultural Reinforcement:** Deepens chapter identity and solidifies long-term volunteer commitment



Translating the M.O.R.E. Framework into Operational Action

Manage Perceptions

“Lo Sapevi Che?”
Awareness campaigns and Volunteer Badges to reinforce trust and community value

Own Success

Senior ownership models and Mentorship programs moving leaders beyond literal mandates

Relentlessly Reassess

Biannual Engagement Surveys providing data-driven insights to adapt continuously

Expand Perspectives

Virtual Team Buildings and the Upcoming European Abroad Program fostering cross-cultural PM Skills

What about you?



What about you?

Which initiatives you already do in your Chapter?

Mentoring

Buddy

Social Media Knowledge Sharing

Volunteers Recognition (Badge, Blog articles)

Abroad Program

Engagement Survey

What about you?

Mentimeter

Which initiatives you would like to bring into your Chapter?

● Mentoring

● Buddy

● Social Media Knowledge Sharing

● Volunteers Recognition
(Badge, Blog articles)

● Abroad Program

● Engagement Survey



The “Proof in Practice” Transition

How to engage volunteers into the Finance Chapter field

The Fragility of the Solo Treasurer



The Reality of a Bottleneck

Everything worked
Reports delivered
Compliance respected

The Risk

Concentration of responsibility limits innovation and threatens continuity

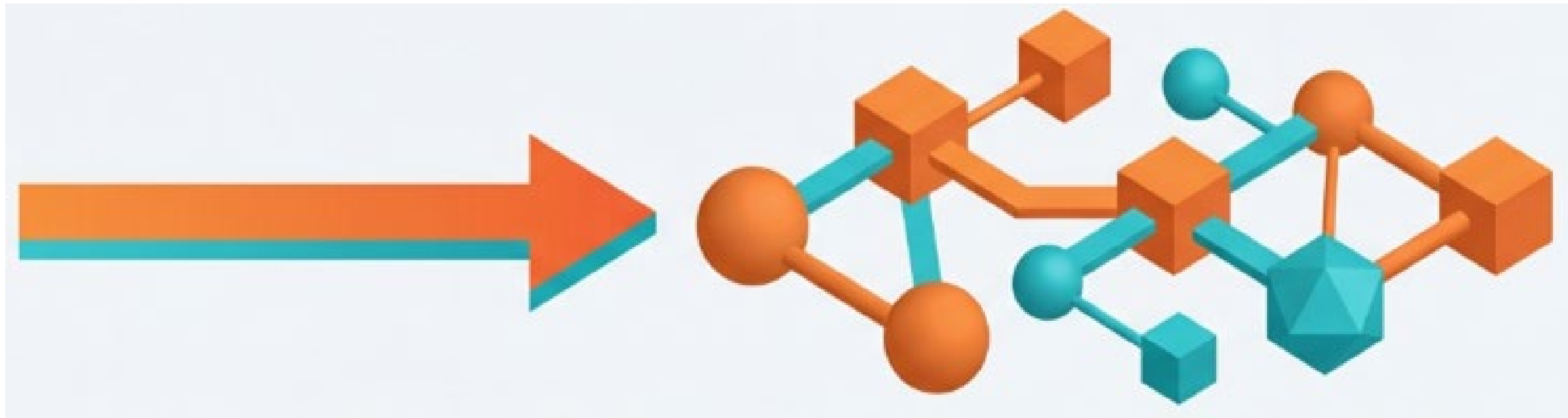
The Pivot

Leadership is not being essential. It is about making yourself replaceable.

MORE
Own Success

Redesigning Treasury

If trust is collective,
Why is treasury individual?



From One Role to a System

The Decision to Share

Volunteers engaged on motivation, not just technical competence.

Focus shifted from finding accountants to empowering accountable leaders.

“You don’t need to be a finance expert. You need to want to learn.”



10 volunteers

Knowledge distributed!

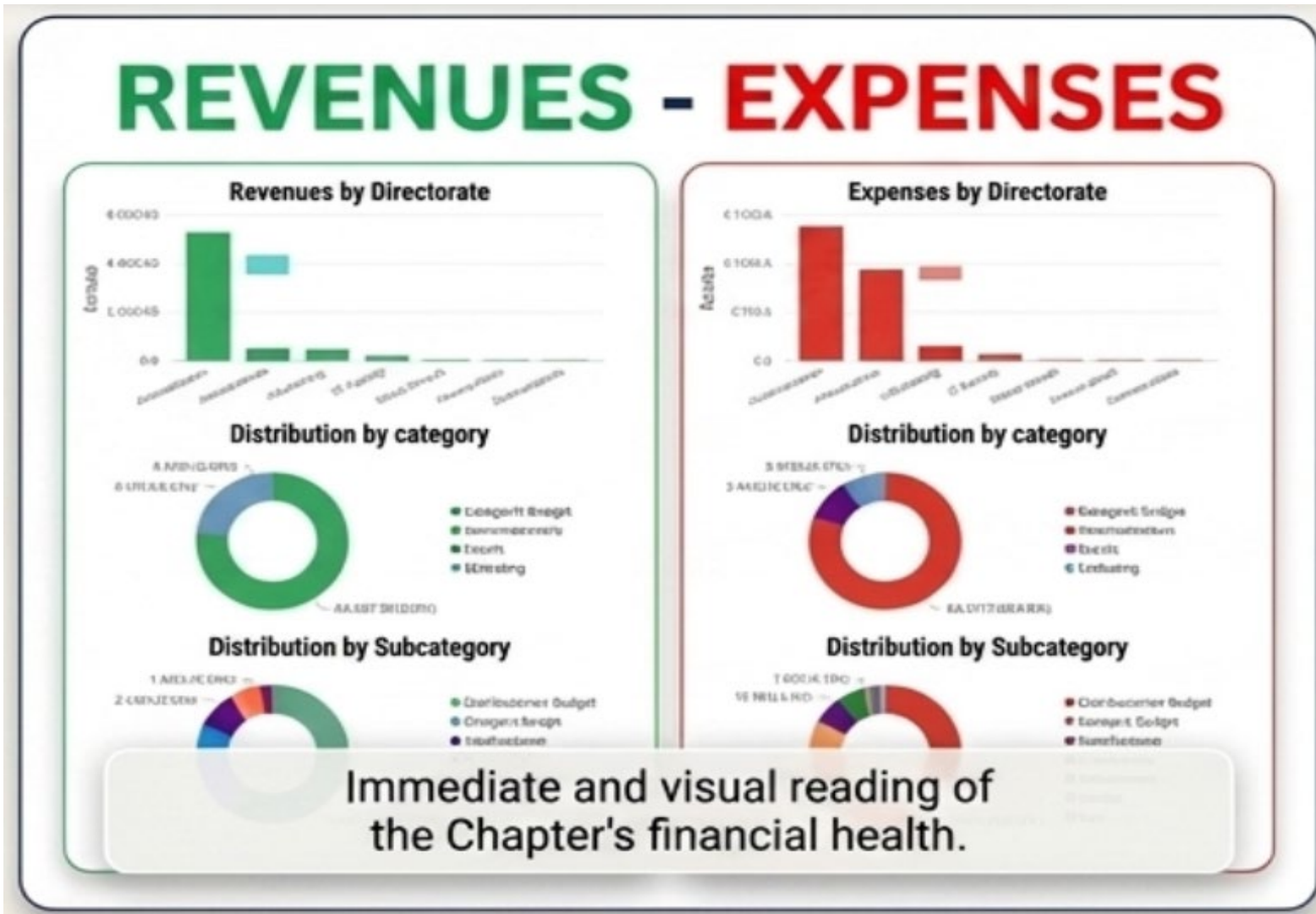


A System of Specialized Domains

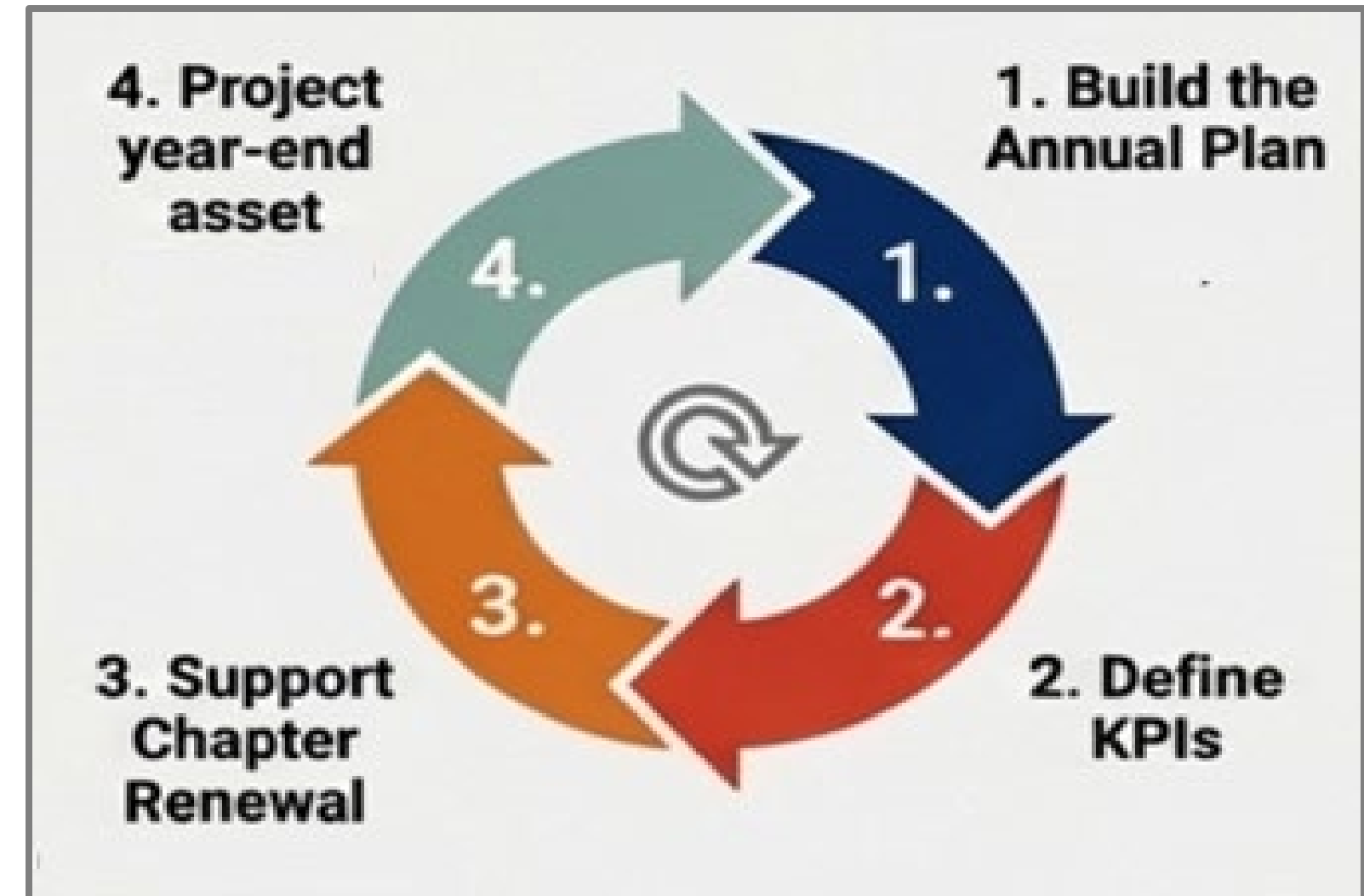


BUDGET & CHAPTER RENEWAL

The new structure: **Categories** - **Sub-Categories** - **Directions**



Sustainability planned not improvised



Budget as a Governance tool

Transparency & Data-Driven Decisions



Collect

Monthly consolidation of financial flows.



Structure

Consistent financial tracking by category and ownership.



Monitor

Analysis of assets, totals, and trends.



Inflow Distribution

Outflow Distribution

Categories

Sub-categories

Directions

Budget vs Forecasting

The Innovation

A volunteer developed a **custom Power BI model**

The Impact

- Knowledge **shared across the team**
- Multiple members can **interpret and update the dashboard**
- Distributed knowledge builds organizational **resilience**
- Supports Quarterly **Budget Variance Analysis**



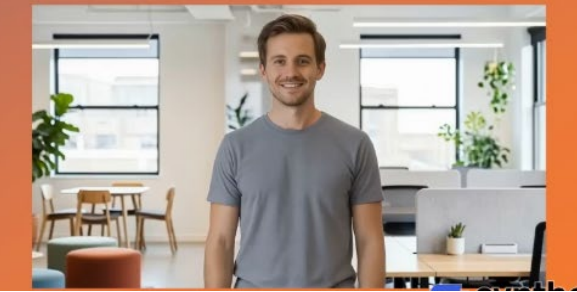
AI & Financial Communication

| | A | B | C | D | E | F |
|----|---|--------|--------|--------|--------|--------|
| 1 | | | | | | |
| 2 | | 8,050 | 5,000 | 3,870 | 3,800 | 3,500 |
| 3 | | 12,500 | 17,500 | 9,800 | 7,500 | 10,000 |
| 4 | | 8,400 | 1,200 | 1,400 | 1,000 | 1,200 |
| 5 | | 100 | 100 | 150 | 100 | 200 |
| 6 | | 300 | 300 | 200 | 100 | 300 |
| 7 | | 350 | 300 | 400 | 300 | 300 |
| 8 | | 150 | 150 | 110 | 50 | 100 |
| 9 | | 100 | 200 | 200 | 100 | 100 |
| 10 | | 4,550 | 4,500 | 5,500 | 4,000 | 5,000 |
| 11 | | 1,300 | 1,000 | 800 | -300 | -300 |
| 12 | | 120 | 120 | 120 | 70 | 110 |
| 13 | | 250 | 300 | 220 | 120 | 220 |
| 14 | | 28,300 | 28,600 | 14,600 | 13,300 | 15,000 |



Analisi
finanziaria
Q3 2025

Direzione Tesoreria e
Comitato



AI-Powered Execution
Dynamic, short video summaries of financial reports

The Next Frontier
Exploring AI automation for the continuous classification of expense/revenue

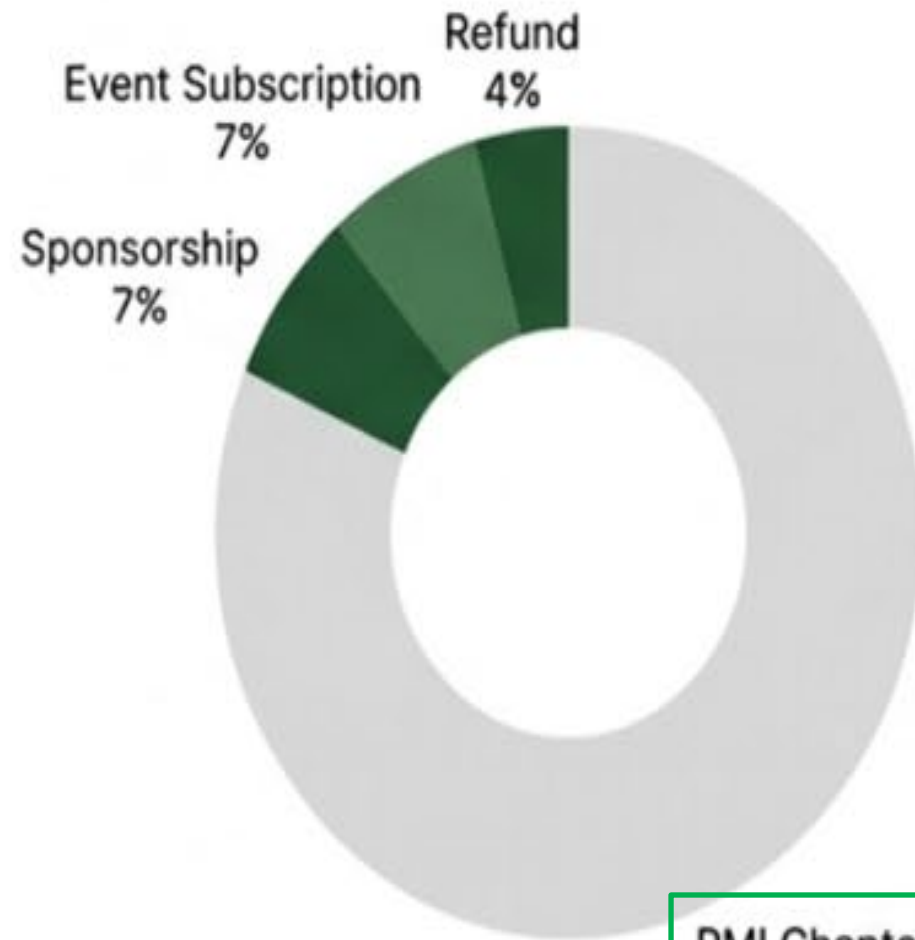
To keep volunteers motivated, the system must evolve!

2025 Results: Budget as a Strategic Instrument

The Budget is no longer just tracking but used to deliver better services for

membe

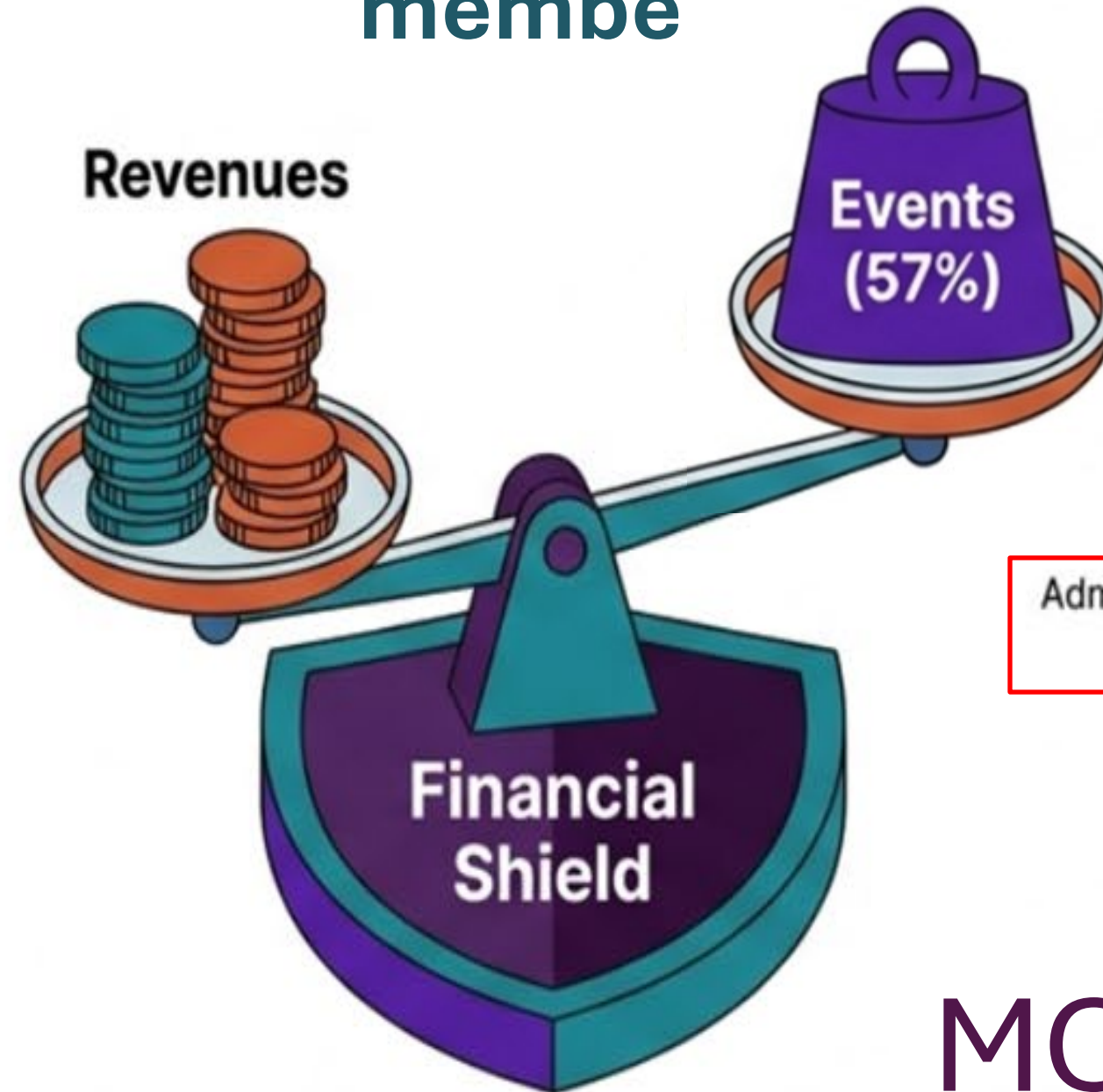
Revenues



+10% vs Budget

PMI Chapter Flow
82%

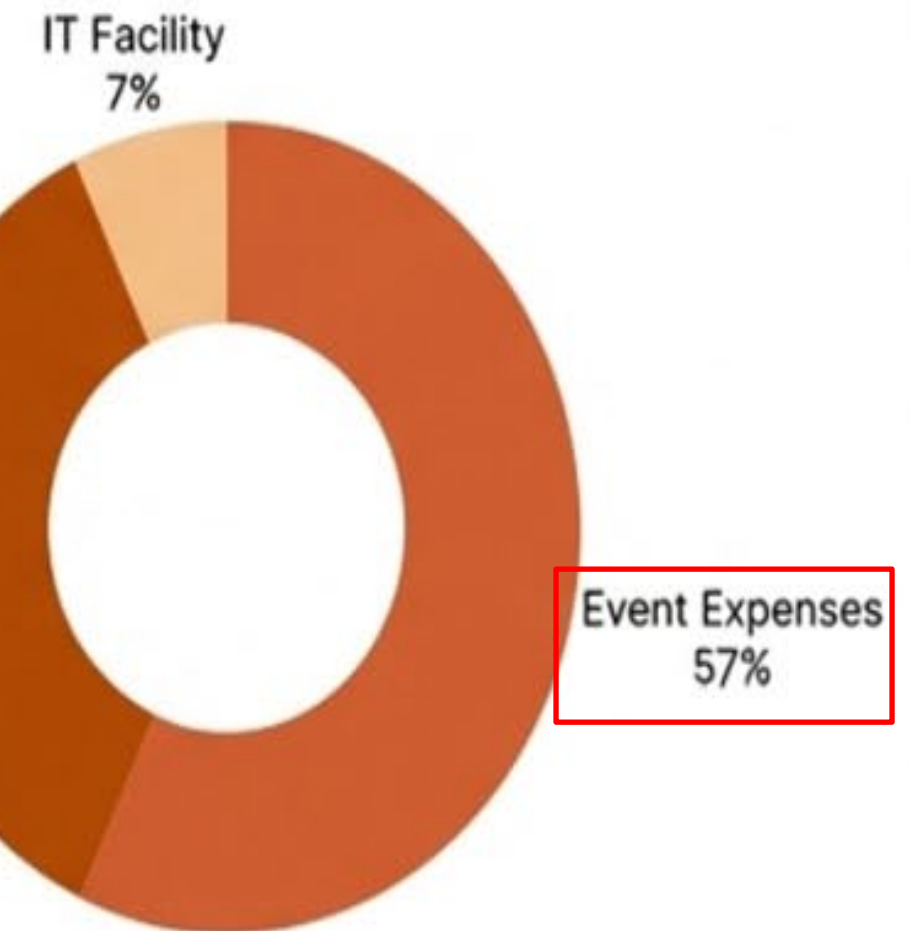
Revenues



Administrative
36%

MORE
Expand Perspectives

Expenses



+33% vs Budget

The ROI of Shared Governance

Rigor Without Rigidity



Finance is more than money

Managing continuity and leadership

Collaboration

System of empowered volunteers

Shared organization

Collective ownership
Resilience and Strength

Stronger, Agile Chapter

Achieving objectives
Better service to members

The Next Frontier: Scaling the Ecosystem Across Borders



The Intent

Foster cross-cultural learning and real-world immersive committee work.



The H2 2026 Foundation

Launching a 3-month European pilot alongside the Luxembourg, Portugal, and Barcelona chapters as a rigorous proof-of-concept for cross-border collaboration.



The Challenge

Creating a unified governance framework to navigate varied local regulations, reducing fragmentation, and sharing sustainable operational models without borders.

Building Your Ecosystem: The Implementation Blueprint



1. Assess the Bottlenecks

Identify single points of failure in your chapter (like the single Treasurer). Where is knowledge protected rather than distributed?



2. Introduce Ownership

Shift mandates from task-execution to outcome-ownership. Build structures where volunteers make decisions within clear boundaries.



3. Democratize Data

Leverage tools like Power BI to make operational data transparent. Resilience requires that multiple people can read and interpret chapter health.



4. Relentlessly Reassess

Implement biannual engagement surveys. Treat volunteer feedback not as complaints, but as vital diagnostic data to tune your governance engine.

Thank you!

Let's continue the conversation!

Questions?



Karen De Campos, PMP®, PMI-ACP®, DASSM®

Senior Project Manager | PMP® | PMI-ACP® | DASSM® | PMI-AHPP™ | Volunteers Director...



Paolo Marino'

MSc - PMP - SAFe SA, PSM I, PSPO I
- SFC- Senior Project Manager Officer ...



Thank You!

Questions?