

# Chapter Dispute Guidelines

<b>Effective Date:</b>	May 2024	<b>Team:</b>
		Global Chapter Programs
<b>Last Update:</b>	May 2024	<b>Responsibility of:</b>
		Manager, Global Chapter Programs

## 1. Purpose

The purpose of the Chapter Dispute Guidelines (“Dispute Guidelines”) is to document the internal processes for effectively managing chapter disputes, as identified in the Chapter Conflict Management Program (“Program”), within Project Management Institute (“PMI”) chapters.

The Program does not supersede chapter leadership, nor shall the Program challenge leadership decisions. The Program shall help facilitate a dispute between two volunteers requiring intervention.

All Chapter complaints shall follow the Chapter Complaint Process, not these Dispute Guidelines. The Chapter Complaint Process may be found on the [Chapter Volunteer Resource Hub, Programs and Services](#).

## 2. Definitions:

- **Chapter Dispute:** Disagreement or ongoing disruptive behavior among two PMI chapter volunteers that requires intervention.
- **Governing Body:** Authority responsible for the review and decision-making outcome.
- **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.
- **Requestor:** An individual chapter volunteer who submits a Chapter Dispute against another chapter volunteer. A Requestor may not be a group of volunteers.
- **Disputant:** The person(s) with whom the Requestor 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”).
- **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 agreement defining future behavior of the disputants. The mediator helps parties communicate, negotiate, and reach agreements but is not empowered to render a decision.

### 3. Roles and Responsibilities:

- **Vice President, Community & Social Impact:** Program Executive Sponsor. *May act as the, or part of, the Governing Body.*
- Global Chapter Programs Team:
  - **Manager, Global Chapter Programs:** Responsible for Program Oversight; Conducts assessments of Chapter Disputes. *May act as the. Or part of, Governing Body.*
  - **Global Chapter Relations Specialist:** SME; Program Owner; Receives and conducts initial assessment of chapter disputes; point of contact for Regional Team, Conflict Mediators and Disputants; Conducts Mediator Onboarding; Initiates Mediation Facilitation; Conducts Chapter Dispute tracking and updating; assists Conflict Mediator with Chapter Dispute close-out. Works closely with the Chapter Insight Team to review feedback from chapters for overall improvement.
  - **Global Chapter Governance Specialist:** SME; Conducts assessments of Chapter Disputes.
- **Chapter Insight Team (“CIT”):** Volunteers that serve a two-year term and provide SME for the Program; Suggest improvements to the Program; Assist with updating these Dispute Guidelines; Present at Leadership Institute Meetings; Deliver Conflict Management Workshops, on request or invitation, provide feedback received from chapters. Works closely with the Global Chapter Relations Specialist to provide feedback and suggestions to improve the Program.
- **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 Global Chapter Relations Specialist.
- **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 Relations Specialist.

### 4. Ineligible Disputes

For ineligible Chapter Disputes, see [Section 1.2 of the Program](#).

## 5. Eligible Disputes

Chapter Disputes eligible for the Program include issues such as a disagreement(s) or interaction(s) that foster an ongoing conflict. A Chapter Dispute may be an interpersonal conflict, such as a disagreement between individual members, volunteers, or leaders. Issues related to communication breakdowns, personality clashes, or perceived slights.

## 6. Conduct

During the evaluation of the Chapter Dispute, 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.

## 7. Dispute Review and Mediation

Phase four of the Program shifts from facilitation to Mediation. The Mediation occurs when a Chapter Dispute is submitted via the [Conflict Report](#).

- The Requestor and Disputant must agree to proceed to Mediation.
- If the Requestor and Disputant do not agree to proceed to Mediation, the matter will be closed notifying both Requestor, Disputant with a copy to Global Chapter Engagement.

The Mediation timeline shall be no more than sixty (60) calendar days starting from receipt of Chapter Dispute to resolution.

Upon receipt of the Conflict Report, the following steps should be followed:

- A. The Global Chapter Relations Specialist will conduct an initial assessment of the submitted Conflict Report to determine the nature and severity of the conflict. All Conflict Reports must include evidence the Requestor and Disputant have pursued Phases one through three under [Section 1.3 of the Program](#), without a resolution. Consultation from the Global Chapter Programs Team and/or a member from the CIT, for further assessment and feedback.
- B. After assessment and review of the Conflict Report, the Global Chapter Relations Specialist will debrief the Chapter Partners of next steps and keep them updated on the status of the submitted Conflict Report.
- C. The Global Chapter Relations Specialist will submit to the Requestor and Disputant, via DocuSign, an "Agreement to Mediate" form ("Agreement").
- D. Upon receipt of the signed Agreement, the Global Chapter Relations Specialist will contact the assigned region Mediator and provide a copy of the submitted Conflict Report with corresponding evidence.

- E. The Mediator will set up the Mediation between the Requestor and Disputant. Mediation calls are held separately and may occur during one session, or over the course of multiple sessions.
- F. To reach a mutually acceptable resolution, the Mediator, Requestor and Disputant, must follow the Mediation Process under [Section 2.4.3 through 2.4.4.4 of the Program](#).
- G. After reaching a resolution, the Global Chapter Relations Specialist will provide an update to Global Chapter Engagement. Global Chapter Engagement shall monitor the Requestor and Disputant to ensure compliance with the agreed-upon terms and provide any necessary support to prevent the recurrence of conflict.

## 8. Review and Evaluation:

These Dispute Guidelines are reviewed and evaluated annually by the Global Chapter Programs Team and the Chapter Insight Team to ensure their effectiveness and relevance.

## Related Documents or References

List any related documents or references used to complete the work instructions.

Document Name	Created/Updated
<a href="#">Chapter Conflict Management Program</a>	Updated: March 2024
<a href="#">Chapter Complaint Guidelines</a>	Created: May 2024