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# Chapters with Branches Model

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A guide for Chapter Leaders



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## Introduction

Under new chartering rules established in 2006 and with prior written permission granted by PMI®, PMI chapters may have the opportunity to deliver services and conduct business through the organization of local committees—or branches—that are not independent of chapters. This guide serves as a comprehensive resource for chapter leaders considering the establishment of a branch, providing essential insights into the strategic decisions and operational frameworks involved.

The guide is divided into two parts: Part 1 will help you assess your chapter's readiness for a branch by evaluating key factors that influence this decision. Understanding these considerations is crucial for ensuring that your chapter is poised to successfully implement a branch. Part 2 will provide detailed instructions on how to create a branch, including the steps necessary to establish and sustain it within the PMI framework. Together, these sections aim to empower PMI chapters to leverage the Branches Model Program effectively, enhancing inclusivity, collaboration, and professional growth within the project management community.

**Note:** All chapters formed in 2006 or prior will operate in the legacy chapter model unless the chapter chooses to reorganize as a Chapter with Branches model (as defined in the Reorganization Process). Any chapters formed in 2007 and thereafter, operate as Chapter with Branches models.

## Part 1 – Evaluating branch readiness

In this section, we will explore the key factors to consider when assessing your chapter's readiness to establish a branch. Understanding these elements is vital for ensuring that your chapter can effectively support and sustain a new branch, aligning with your strategic goals and community needs. By evaluating your chapter's current resources, leadership capacity, and member interest, you can make informed decisions about whether to move forward with this initiative.

## Four key benefits to forming a branch:

### **Community growth and reach:**

- Expand membership and outreach by establishing new branches in untapped geographic areas, broadening the community's accessibility and reach.

### **Impact and recognition:**

- Boost community impact and brand recognition by improving support in new regions and demonstrating the organizational value of PMI's mission and objectives.

### **Operational excellence:**

- Achieve operational excellence through effective resource sharing, smooth transitions of chapters into branches, and ensuring long- term sustainability.

### **Leadership development:**

- Enhance volunteer engagement and leadership skills by recruiting diverse members and fostering inclusive, collaborative decision-making.

## What can chapters with branches expect from PMI?

### **Flexible governance models:**

- Guidance on implementing flexible governance structures that accommodate the unique needs of branches and ensure effective decision-making and alignment with PMI's strategic objectives.

### **Grant programs and financial support:**

- Additional chapter reimbursement support for chapters with formal incorporated branches.

### **Training and resource sharing:**

- Workshops and webinars tailored to address the unique needs of chapters and branches. Access to a centralized repository of best practices, templates, and tools specifically designed for chapters and branches. *Coming in 2025.*

### **Enhanced technology and tools:**

- Ongoing investigation into technologies to enhance chapter operations, streamline processes, improve communication, support volunteer collaboration, and standardize branch management.

## What can chapter members expect from chapters with branches?

### **Collaboration:**

- Enhanced knowledge sharing and community collaboration

### **Leadership opportunities:**

- Roles to lead and contribute to the chapter at the branch level

### **Community and networking:**

- Closer connections and more localized networking opportunities

### **Adaptability:**

- Enhanced responsiveness to local market dynamics and member feedback

### **Enhanced accessibility:**

- Convenient access to local activities and resources

### **Tailored development:**

- Professional growth through local workshops and training

### **Diverse engagement:**

- Programming tailored to local interests and needs

### **Influence and impact:**

- Ability to shape regional project management initiatives



## Should our PMI chapter create branches?

While all chapters formed in or after 2007 can choose to leverage the Chapters with Branches model, not every chapter will decide to implement a branch structure. It's important to consider the pros and cons of a branch structure before proceeding.

### Some considerations in implementing a branch structure are:

#### Pros:

- Adding branch structures creates more leadership opportunities.
- Outreach programs to new or distant communities can be formalized.
- Smaller communities of members can be served without the overhead of creating a chapter and administrative burden of operating a chapter.
- Several communities can share the overhead costs of running a chapter.
- Connections between geographically separate communities can be strengthened.
- Learning resources can be shared across communities.

#### Cons:

- Adding branch structures creates more leadership opportunities.
- Governance and chapter management becomes more complex and challenging.
- Financial management for the branch and chapter may require more administrative effort.

You may notice the first bullets in our Pros and Cons lists are the same. PMI understands more opportunities are not always a positive—especially if there are difficulties finding volunteers to fulfill existing roles. Chapters should emphasize and focus on building “micro” or short-term volunteer opportunities and non-elected opportunities, such as committees, program leads, and event support.

Each PMI chapter needs to decide whether the benefits of implementing a branch structure outweigh the risks. Inclusion and consistency are important in applying practice, policy, and procedures to minimize risk and liability to the chapter. Branches should align with the annual plan of their chapters. Implementation of the branch structure requires the full commitment of the chapter board before proceeding.

Since each branch will be part of the chapter, the chapter must treat the branch as part of its operations and governance. There must be no perception (implied or stated) that the branch is operating as a separate entity from its chapter. These limitations are discussed below.

Above all, the chapter must focus on delivering value to its members and ensure that by creating a branch, it delivers more value to chapter members than it would without a branch. The chapter cannot discriminate or impose limitations on its members. For example, deciding certain members may only attend events promoted by the branch.

In the following section, you will find a text-based decision tree designed to guide you through the evaluation process, enabling you to make an informed decision regarding the establishment of a branch.

## Branch Creation Decision Tree

1. **What is the demand for project management support in the proposed geographic/community area and the potential reach of the branch?**
  - a. Minimal Demand; Limited Reach → ***A branch may not be the right choice at this time. Connect with your Chapter Engagement Partner to discuss how to improve conditions for a branch.***
  - b. Moderate to High Demand and Interest → ***Proceed to Question #2***
  
2. **What is the availability of volunteers to support the branch's establishment and ongoing operations?**
  - a. Limited Volunteer Pool; Uncertain Leadership Capacity → ***A branch may not be the right choice at this time. Connect with your Chapter Engagement Partner to discuss how to improve conditions for a branch.***
  - b. Moderate to High Volunteer Support; Some Leadership Candidates Identified → ***Proceed to Question #3***
  
3. **Is the chapter able to facilitate the creation and growth of a branch? (resources, knowledge, support)**
  - a. Limited Resources and Support; Unclear Commitment from Chapter → ***A branch may not be the right choice at this time. Connect with your Chapter Engagement Partner to discuss how to improve conditions for a branch.***
  - b. Limited to Moderate Resources; Some Commitment from Chapter → ***Proceed to Question #4***
  - c. Moderate to Abundant Resources; Strong Commitment from Chapter → ***Proceed to Question #4***

4. **What does a market analysis show for the competitive landscape and potential challenges facing the branch?**
  - a. High Competition, Poor Market Potential, Sizable Barriers → ***A branch may not be the right choice at this time. Connect with your Chapter Engagement Partner to discuss how to improve conditions for a branch.***
  - b. Moderate to Low Competition, Good Market Potential, Few Barriers → ***A branch may be right for you! Consider moving forward with creating the branch with appropriate support and resources.***
  - c. Low Competition, Untapped Market Potential, Few Barriers to Entry → ***Proceed to Question #5***
  
5. **Does a branch align with the chapter's annual plan objectives?**
  - a. Yes → ***A branch may be right for you! Connect with your Chapter Engagement Partner to discuss next steps.***
  - b. No → ***Consider the potential for alignment and available support before proceeding.***

## Part 2 – Establishing a chapter branch

Welcome to Part 2 of the guide, where we will delve into the practical aspects of creating a branch within your PMI chapter. Having assessed your chapter's readiness in Part 1, you are now equipped to embark on the journey of establishing a branch. This section will outline the specific steps involved in setting up a branch, from initial planning and stakeholder engagement to operational considerations and ongoing support.

Creating a branch is not just about expanding the chapter's reach; it is about fostering a vibrant community that reflects local needs and encourages collaboration among project management professionals. By following the structured framework provided in this part, you will be well on your way to launching a branch that enriches the chapter's offerings and enhances the overall impact of PMI within your region. Let's get started!

## What are the limitations in creating branches?

A branch is not intended to be a formal corporate structure. This is one of the advantages of creating a branch structure, as branches can be created quickly. However, some actions may provide the perception that a branch—while not a legal entity—is acting as a separate organization with consequences defined by the law.

**Therefore, the following limitations must be accepted by the chapter and branch:**

### **Relationship:**

- The chapter supports the branch as documented in the chapter's charter agreement with PMI, after approval by PMI.
- There will be no charter agreement between the chapter and the branch.
- The branch must be part of the geographic territory of the chapter, as described in the chapter's charter agreement with PMI.

### **Branding:**

- The branch does not have its own logo.
- The branch will use the logo of the chapter and can use the tagline "PMI [Insert Chapter Name] Chapter [Insert Geographic location, academia] Branch."

### **Elections:**

- If elections are used to select the leader(s) of the branch, per the chapter's bylaws, all chapter members in good standing are eligible to vote in branch elections. (Refer to section [How are Leaders Elected?](#))

### **Financial:**

- The branch is subject to financial oversight and accountability of the chapter. All bank accounts and funding for branch operations must be sponsored by and maintained under the chapter's control. And while signing authority may include branch leaders where appropriate, the accounts must still be under the chapter's control.

### **Geography:**

- A branch must operate within the geographic boundaries of its chapter. A branch should not operate in a country (or political area) different from where its chapter has been incorporated/registered.

Following these limitations ensures the branch is not operating or appearing as a separate organization. Such an impression would leave the branch, chapter, and potentially its leadership open to liability. These limitations have been documented to protect the chapter and its leadership from a fiduciary perspective.

## One branch or two or more?

After the chapter decides to establish the first branch, it must then decide whether the original area serviced by the chapter will also be organized as a branch. If in effect, two branches may be created within the chapter: one for the original area and another to serve the new areas.

### **If the board elects to adopt the two-branch approach, it must make the following considerations :**

- Policies and procedures must be created and followed to govern the overall chapter operations, branch operations, and interactions within branches.
- There is less likely to be “first among equals”. Feelings of disparity for the new branch may be avoided since all branches are peers.
- Leaders may be forced to openly address questions about unequal treatment of different branches.
- Overhead items that serve all branches may be easier to identify and manage.
- Some disruption and added complexity are inevitable because of the necessary governance changes.
- There may be extra work and expenses to re-organize the affairs of the chapter and manage the new branch(es).
- Communications will need to be equalized, so all branches share the same level of information.
- More volunteers may be required to fill the new or increased number of volunteer positions, elected and non-elected.
- The chapter needs to have well-defined processes and governance policies to ensure membership value is uniform, consistent, and delivered equally within the branch(es) as outlined in the Catalog of Core Services and articulated through the annual plan.



There is no limit on the number of branches formed by a chapter. But chapters must consider the impact on members and the operational implications of creating large numbers of branches.

### **The impacts could include:**

- Confusion in the membership as to the purpose of each branch.
- Increased administrative support for the chapter for each branch created.
- Increased governance required by chapter leaders for the branches.

## Is there a minimum number of members for a branch?

There is no minimum (or maximum) number of members required for a branch. As mentioned in this guide, branches do not have their own exclusive members. Instead, all members belong to the chapter, with geographical branches serving specific community needs.

The key is determining the optimal branch size necessary to effectively support local communities. There are two elements chapters must consider when addressing this question:

- **Is there a large enough pool of dedicated volunteers to operate the branch?**
- **Are the local practitioners, members, and community obtaining value from the branch?**

**If the answer is yes to both questions, the branch creation may continue.**

## Is a branch always based on geography?

Branches are now exclusively based on geographical location within the chapter territory. They must be located within the defined chapter territory and serve the local community within that area.

Groups at universities or academic institutions should be classified as student clubs, not branches. These student clubs should be affiliated with recognized academic institutions within the chapter's jurisdiction and cater to the specific academic community at that institution.

All new branch or club proposals must adhere to these criteria to ensure alignment with the chapter's mission and objectives.

## What is the geographic region of a branch?

A branch must be located within the geographic territory of its chapter. For example, if a branch is set up to support a geographic location within the chapter's territory, but is distant from the primary chapter operations, it may require a more localized value delivery.

In cases where a chapter wants to create a branch outside its geographic territory for an area or territory not presently encompassed by another PMI® chapter, the chapter must follow existing PMI procedures as defined in the Reorganization Process and obtain PMI approval.

*\*Chapter Reorganization Process may not be applicable in 2026.*

### Some considerations for the location of a branch:

- Will the name of the branch communicate where the branch is located and its purpose?
- Are the branches located too close together?
- Are there appropriate facilities to hold a branch meeting in the location?
- For legal and tax reasons, a branch may not operate outside of the chapter's defined political jurisdiction, state, province, or country. If this situation arises, the chapter leaders must contact the Region's Chapter Engagement Team prior to setting up the branch. (See [What Are the Limitations in Creating Chapters?](#)).

## Can an existing chapter turn into a branch?

Yes, the Chapter with Branches Model allows for chapters to combine, essentially converting from multiple chapters to a single chapter with multiple branches. This procedure involves the dissolution of one or more chapters and will be considered case-by-case by PMI.

## Can a branch be used to start a chapter?

If PMI® volunteer leaders believe another chapter in the area will increase the value provided to current and prospective chapter members and encourage development of membership in the branch area, creating a branch is one way to start a chapter. However, this method is expected to be used infrequently.

The branch can use the chapter's support to develop interest in Project Management, stability in networking and professional development meetings, and the maturity in volunteer leaders before forming a chapter.

**If a branch is being created with the intention of becoming a chapter, the following should be considered:**

- Branch leaders should be elected as part of the chapter elections.
- Create a sub bank account to the chapter bank account to allow easy identification of the branch's funds.
- Support and encourage branch leaders to attend PMI Leadership Institute Meetings.
- Create a document to define how the branch will split away from the chapter to create a new chapter.

If a branch within a chapter has grown and both the branch and the chapter leadership wish the branch to become a chapter, the Chapter Formation Process must be followed, including the preparation of a business plan and obtaining PMI approval to proceed with the new chapter.

## Is forming a branch the only option?

If a chapter wants to create a new community to provide services to its members, there are three options—each with its own advantages and disadvantages—that may be considered:

- Committee
- Branch
- Chapter

### Committee

A committee is a group of volunteers set up by the chapter to support its operations. Committees have a chairperson and report to the chapter board of directors through a board member. See PMI Bylaws Template, Article VII for more information about committees.

#### **Advantages of a committee:**

- Easy to set up and requires no changes to the Chapter Bylaws or operating procedures
- Has operational focus
- May be a way to gauge enough interest in an area to start a branch

#### **Disadvantages of a committee:**

- There is no branding or separate identity of the chapter

#### **Committee examples:**

- Create a new committee to hold a dinner meeting in a different part of a large metropolitan city
- A committee to create a policies guide for the chapter

### Branch

A branch consists of a group of members holding networking or professional development events, either at some distance from the main chapter location or having a unique academia/university focus.

#### **Advantages of branches:**

- They require minimal effort to set up.
- They specifically focus on providing networking and professional development meetings to members.
- They are branded as a branch of the chapter.
- Branches can share resources, thus providing economic advantages.

#### **Disadvantages of branches:**

- They are not independent groups and must follow and align with the annual plan and operations of their chapters.

#### **Branch example:**

- Create a branch to serve members geographically distant from the chapter's primary event/meeting locations.

### Chapter

A chapter is an independent legal entity created to promote Project Management in a specific territory/location and provide products and services to members in its assigned territory/location.

#### **Advantages of chapters:**

- They are independent and set their own annual plan aligned to PMI's strategic direction.

#### **Disadvantages of chapters:**

- Chapters are separate legal entities and can be difficult to create, manage and sustain.



- They are required to maintain a minimum level of performance.

**Chapter example:**

- Create a new chapter to serve a large population of PMI members that may not be serviced by another chapter and may be geographically distant from the closest existing chapter.

*\*Branch(es) may not be set up unless the chapter was formed after 2007 or the chapter has completed the formal reorganization process.*

## Considerations for chapter governing documents

The chapter should investigate whether the local jurisdiction, country, or region in which it operates will require new or updated registration/incorporation documents or filings.

The chapter's governing documents, such as the Chapter Bylaws and the Charter Agreement must be assessed to determine whether a branch(es) is allowable. The Chapter Bylaws and the Charter Agreement may require changes. In accordance with PMI policy, the chapter must submit the newly proposed bylaws to PMI for review and approval prior to sending them to the chapter's membership for a ratification vote.

## What is the best governance structure for a chapter with branches?

There is no single recommended governance structure model for running a branch; instead, each chapter should identify the method of governance best suited to its specific needs. This includes aligning with the chapter's goals, leadership style, control requirements, volunteer resources, and geographic constraints. By tailoring the governance model, chapters can effectively support their branches while maintaining accountability and responsiveness.

The chapter's board of directors must determine how branch leaders fit into the governance structure, as the PMI chapter sponsors the branch and holds full responsibility for all actions related to branch leadership, operations, and performance. The board can either appoint committee or branch leaders, or the leaders can be elected by chapter membership. Each chapter must select its own governance structure, which should be clearly documented and communicated to all parties to ensure control and accountability. The title of the branch leader should not imply they have more authority than they legally possess. Think of the branch leader as a chair of a chapter committee, or a branch chair.

**Note: Considerations for elections are discussed in the next section. Chapters may choose a governance relationship defined as follows or with some variation:**

- Branch leader is an elected member of the chapter board.
- Branch leader reports to a member of the chapter board, consistent with a committee structure.

## **Considerations for including the branch leader in the chapter board:**

### **Pros:**

- A direct connection between the branch and the chapter is established at the most senior level.
- An elected leadership role on the board may facilitate more efficient communications about branch activities, so the branch maintains continuous alignment with the chapter's annual plan and the delivery of member value.
- A position on the board by the branch leader validates the branch's status, providing recognition of support by the chapter to the branch and indicating the branch is an integral part of the chapter's value proposition to its members.
- Accountability of the branch to the chapter is reinforced.
- A position on the board for the branch leader could be part of the leadership development path, providing branch leaders an opportunity to participate directly in chapter decision-making.
- Branch leadership may be viewed as a training ground for future board members.
- The board may be able to react faster to branch level issues and needs.

### **Cons:**

- If a chapter has many branches, having the branch leaders as members of the chapter board may create a large chapter board that could become unwieldy to operate.

### Considerations for centralized leadership:

An alternative model could involve centralizing leadership under one board leader responsible for overseeing all branches. Each branch would then have its own designated branch chair, tasked with liaising directly with the central leadership and representing the unique needs and issues of their respective branches. This model aims to streamline communication and decision-making processes by consolidating authority at the top, while still allowing for localized representation and responsiveness at the branch level.

#### Pros:

- Ensures overarching annual goals set by the central board leader are communicated and implemented effectively across all branches, while also empowering branch chairs to advocate for, and address specific concerns within their local communities.
- Fosters a balanced approach to governance, promoting efficiency, cohesion, and responsiveness throughout the organization.

### Best Practices:

PMI® Best Practices suggests that if the chapter has more than three branches, it is ideal to have one elected leadership role to represent all branches.

Branch leaders must also be included in the chapter's annual planning sessions to ensure alignment with the chapter's goals and strategies. This integration helps maintain consistency in delivering value to members and allows branch leaders to contribute to the strategic direction of the chapter. This involvement is essential for effective coordination and execution of the chapter's overall plan.

## How are leaders elected?

The chapter must determine whether branch leaders are elected or appointed positions. Initially, the chapter may decide to appoint the first branch leader.

**Note: branches may not hold their own separate elections.** Serving at the board level and the branch level simultaneously is prohibited, and favoritism towards branches will not be tolerated.

### Some considerations of holding elections for branch leaders include:

- Members may feel greater control over what benefits they receive from the branch.
- Local members may be drawn to participate in branch leadership.
- There may be added effort and cost for holding elections because of the additional positions eligible for election.
- There will be a requirement for additional rules and governance, including changes to the Chapter Bylaws.

## Financial management and oversight for branch operations

What about money? The new branch will need access to funds to operate and may also generate revenue at its branch events. All bank accounts and funding for the branch operations must be sponsored by and maintained under the chapter's control. The chapter must decide how this money will be controlled, because all transactions at the branch level are the chapter's responsibility and must be fully reported as such.

**Elected leaders assigned to the financial role must create systems and policies to ensure:**

- All transactions at the branch level are properly authorized and recorded.
- All chapter assets in possession of the branch are properly accounted for; a branch should not possess assets of its own.
- Entitlements to a share of chapter revenues and responsibility for a share of overhead expenses are determined in a fair and equitable manner.

To achieve these control goals, a chapter may want to create a separate bank account under its control for branch administration. In all cases, the bank account is the property of the chapter.

### Considerations of a separate bank account for branch activities:

**Pros:**

- Branch transactions and cash can be fully segregated from the rest of the chapter.
- Branch officers may be included on signature cards to complete transactions more easily .

- Cash available to the branch is easily measured by the branch account balance (fewer outstanding checks plus outstanding deposits).
- Communications between the branch and the chapter about transactions can be reduced.
- The visibility of the branch activities to the chapter could be reduced via a separate bank account, even though chapter responsibility isn't diminished.
- Local banking laws may dictate requirements for signers and reporting.

### **Cons:**

- The elected leader assigned to the financial role for the chapter may have less control over branch financial activities and will need to devise mitigating controls.
- Distributed financial management capacity is required; financial expertise may not be available at the chapter or branch.
- Accounting policies and procedures could be implemented differently between the branch and the chapter.
- Accounting, bookkeeping, and financial reporting may become more complicated.
- Combined reporting will require additional effort and may take longer to complete.
- Maintaining multiple bank accounts may attract more bank charges.
- Cash transfers between accounts must be managed.
- An additional bank account will increase administrative workload.

Having a separate bank account for the branch is not the chapter's only option. The elected leader assigned to the financial role could use existing chapter financial policies (i.e. Chapter Volunteer Reimbursement Policy) and modify them



for branch operations. Other financial best practices are listed below:

- Have all branch receipts deposited in the central chapter bank account.
- Issue payments for branch expenses from the central chapter bank account.
- Provide cash advances to branch leaders to fund routine expenses.
- Require branch leaders to submit expenses to the chapter for reimbursement.
- Pre-pay deposits or advances to specific suppliers to the branch for budgeted and pre-approved expenditures.

Please refer to the *Chapter Leaders Guide for Financial Management* on the [Chapter Admin portal](#) for more information on Chapter Financial Management Best Practices.

## Success measures

Success in PMI's Chapters with Branches Model is quantified through measurable outcomes across ten key areas, including membership growth, volunteer engagement, resource optimization, and brand enhancement.

By achieving these benchmarks—ranging from geographic expansion to sustained organizational value—we ensure a thriving, interconnected community that not only meets, but exceeds the strategic objectives of PMI. This table serves as a guide to visualize and track progress, ensuring that every step taken contributes significantly to the overarching goals of the organization and the professional growth of its members.

Success Measures	Key Indicators
Membership growth and engagement	Increase in membership numbers; Higher member engagement
Geographic expansion	Establishment of new branches; Increased regional coverage
Volunteer acquisition and development	Diverse volunteer recruitment; Leadership development
Resource utilization and support	Effective resource sharing; Supportive feedback
Community impact	Positive member feedback; Advancement in project management
Transition success	Smooth transitions for reorganizing chapters
Governance and decision-making	Inclusive participation; Aligned decision-making
Brand recognition and reputation	Increased recognition; Positive community perception
Sustainability and growth	Long-term stability; Continuous evolution
Overall organizational value	Achievement of PMI objectives; Quantifiable added value

## What happens if a branch does not succeed?

Branches are not legal entities, so they can be created and discontinued by the chapter as necessary. The chapter must notify PMI when a branch is created or when a branch is dissolved/discontinued. If a chapter is not sure a branch is necessary, it should consider setting up a committee first.

## Initiating the branch creation process

To begin the process of creating a new branch for your chapter, the first step is to fill out the form [at this link](#) expressing your interest in establishing a branch. Once you've submitted this form, you will collaborate with your Chapter Engagement Partner, who will guide you through the steps outlined in the Creating a Branch Checklist in the next section.

In addition, for your reference, we are including the checklist for dissolving a branch. If you have interest in this process as well, please indicate it on the [same form](#). This ensures that we can provide the necessary support and resources for both establishing and, if needed, dissolving a branch.

## Checklist for creating a branch:

All interest in forming a branch must be expressed on [this form](#) before proceeding with any of the following steps.

### Strategic planning and assessment:

- Clearly articulate the goals and purpose of establishing the branch aligned with PMI's strategic objectives.
- Assess demand for Project Management services in the target geographic area.

### Resource allocation and financial planning:

- Determine financial, human, and logistical resources required to set up and sustain the branch.
- Develop a budget outlining projected branch expenses and revenue streams.

### Volunteer and leadership engagement:

- Evaluate availability and interest of current chapter members to support the branch.
- Identify potential leaders who can spearhead branch establishment and operations.

### Governance structure:

- Define a governance structure detailing roles, responsibilities, and decision-making processes specific to the branch.
- Ensure alignment with the main chapter's governance framework while allowing local adaptation.

### Brand positioning:

- The branch must use the logo of the chapter and can use the tagline "PMI [Insert chapter name] Chapter [Insert geographic location] Branch".

### **Legal and regulatory compliance:**

- Research legal and regulatory requirements for establishing a branch in the target jurisdiction.

### **Operational setup:**

- Develop a plan for operational processes regarding event management, member services, and administrative tasks.

### **Evaluation and monitoring:**

- Establish key performance indicators (KPIs) to measure branch success.
- Develop a monitoring framework to track progress and make data-driven decisions.

### **Membership development:**

- Develop a plan for activities and engagement opportunities aimed at retaining members and cultivating community in the new branch territory.

### **Next steps:**

- Consultation and approval:** Present branch creation plan to chapter leadership for consultation and approval.
- Implementation:** Begin implementation of plan, assigning responsibilities and ensuring accountability. Complete necessary paperwork, filings, and notifications as per local laws and PMI guidelines.
- Launch activities:** Organize launch events to introduce the branch.
- Build partnerships:** Explore collaboration opportunities with local organizations and businesses in branch territory.
- Recruitment plan:** Develop a plan to recruit members from the local Project Management community in the new branch territory.
- Review progress:** Conduct regular reviews of branch operations to assess effectiveness, identify areas for improvement, and adapt strategies based on feedback, changing community needs, and organizational goals.

## Checklist for dissolution of a branch:

All interest in dissolving a branch must be expressed on [this form](#) before proceeding with any of the following steps.

### Assessment and evaluation:

- Evaluate branch performance in terms of engagement and contribution.
- Determine the necessity of branch dissolution based on assessment.

### Communication and consultation:

- Seek feedback and input from branch leadership on the dissolution process.

### Legal and regulatory compliance:

- Review legal requirements for branch dissolution.
- Complete necessary paperwork, filings, and notifications, as per local laws and PMI guidelines.

### Financial settlement and transition

- Conduct a financial review and assessment of liabilities, outstanding debts, and financial obligations of the branch.
- Settle outstanding financial matters including payments to vendors, creditors, and volunteers, if applicable.

### Member and volunteer transition:

- Develop a transition plan for chapter members in branch territory regarding future engagement opportunities and continuing involvement with the chapter.

### Final reporting and accountability:

- Prepare final reports on branch activities, financial status, and outcomes for chapter leadership and PMI.

### Next steps:

- ❑ **Consultation and approval:** Obtain final approval from chapter leadership and PMI for the branch dissolution.
- ❑ **Communication:** Communicate the final closure of the branch to all stakeholders, ensuring transparency and clarity.
- ❑ **Support:** Provide ongoing support and assistance to chapter members, volunteers, and stakeholders affected by the branch closure.
- ❑ **Review progress:** Conduct a post-dissolution review to assess the effectiveness of the closure process and lessons learned. Document all dissolution activities, decisions, and outcomes for future reference and compliance.



## Conclusion

Careful planning and analysis of the subjects in this guide will help chapters arrive at sound decisions for the creation of a branch. Detailed success measures are outlined in the resources section of this document.

If you need further information or assistance, please contact your region's Chapter Engagement Team, which can be located [here](#). You may also direct your inquiry to the general chapter mailbox at [ChapterSupport@pmi.org](mailto:ChapterSupport@pmi.org).