

PRESIDENT

ROLE DESCRIPTION: Elected volunteer responsible for overall oversight of the chapter and the board. The president shall direct the activities of the other board members in accordance with the chapter bylaws.

ROLES AND RESPONSIBILITIES:

- Direct the chapter's strategic goals
- Strive to achieve the chapter vision, mission and objectives as detailed by the chapter board and PMI and chapter strategic plan
- Direct the activities of other officers toward chapter goals and objectives
- Assure that the chapter board works together as a team
- Represent the chapter at public events
- Ensure strategic alliance, planning and annual reporting
- Ultimately accountable for all board operations and chapter activities
- Act as a liaison between the chapter and PMI
- Ensure that the charter renewal is updated and in compliance as specified by PMI
- Preside over the board of directors meetings and the annual general membership meeting
- Ensure that all chapter business is being done legally and ethically
- Assume responsibility for the overall functioning of the chapter
- Legally represent the organization (this role can be co-dependent with the finance officer)
- Ensure statutory and regulatory compliance in consultation with the vice president of finance
- With the board, ensure prudent disbursement of chapter funds
- Drive implementation of revision and amendments of PMI policies and guidelines to chapter processes
- Manage periodic policy audits
- Promote leadership development opportunities for board development.
- Develop and implement a succession and transition plan

ROLE SPECIFIC SKILLS:

- PMI Knowledge and Experience
- Organization Management
- Management Skills
- Volunteer Recognition and Appreciation

OTHER LEADERSHIP SKILLS:

- Ability to Delegate
- Effectively Public Speaking/Presentation Skills
- Conflict Resolution Skills
- Team Building Skills

AVERAGE VOLUNTEER HOURS PER MONTH: 25 HOURS

VICE-PRESIDENT OF FINANCE

ROLE DESCRIPTION: Elected volunteer responsible for finance. Responsible for maintaining and presenting all financial records required for chapter operations in accordance with chapter and bylaws.

ROLES AND RESPONSIBILITIES:

- Maintain and manage accounts receivable and payable and all financial portfolios, including but not limited to the collection of chapter dues from PMI, guest payments for chapter meetings or special events and the payment of all chapter bills in accordance with chapter committee directives
- Establish and maintain all required chapter bank accounts and/or similar financial transactions; arrange for officer signatures as required Provide financial reporting regarding the state of finances and chapter activity to chapter membership, board and executive level volunteer leaders on a monthly basis (board meeting)
- Report on the state of finances at board meetings and chapter meetings
- Develop an annual operating budget and financial statement to be included in the annual application for charter renewal
- Ensure the chapter has reviewed and reported required tax filings
- Recommend improvements in the financial processes to the board
- Establish and maintain financial operational processes to ensure continuity of chapter operations and define, document and maintain chapter policies
- Maintain the annual budget
- Contribute to financial planning/goal setting, investing, forecasting and budgeting for the chapter
- Distribute/communicate financial section of the annual report to chapter membership
- Assist in the preparation of the annual financial statements and reports
- Provide timely information to independent auditors as required Keep an up to date inventory of all the goods of the chapter Handle all PMI and government required payments
- Ensure maintenance and storage of all historic financial documents Establish financial metrics; ensure chapter is maintaining requirements Serve as liaison with PMI Global Operating Center on financial matters
- Prepare financial guidelines and procedures for the chapter along with board
- Analyze cost impact and income benefit of all activities proposed by the board of directors
- Review any chapter contract, agreement and insurance
- Distribute information, materials and/or fees received from the PMI Global Operating Center to appropriate officers in a timely manner
- Confirm and check bank accounts monthly
- Develop and implement succession and transition plan

ROLE SPECIFIC SKILLS:

- Documentation Skills/Financial Record Keeping
- Analytical Thinking

- Knowledge of Financial Planning
- Legal Awareness
- Knowledge of Generally Accepted Accounting Principles (GAAP) Basic Knowledge of Economics
- Accounting Software/Tools (e.g., Quick Books, Excel)

OTHER LEADERSHIP SKILLS:

- Negotiation Skills
- Conflict Resolution Skills
- Time Management Skills
- Technical Tools Skills (e.g., WebEx, Live Meeting, Registration and Event Software)
- Adaptability/Flexibility

AVERAGE HOURS PER MONTH: 8 HOURS

VICE PRESIDENT OF MEMBERSHIP

ROLE DESCRIPTION: Elected volunteer responsible for addressing the needs of chapter membership, including service delivery, recruiting, and retaining members in accordance with chapter policies and bylaws.

ROLES AND RESPONSIBILITIES:

- Develop and maintain a chapter membership plan that assures continued growth through proactive recruiting and partnering with major area employers
- Promote the value of PMI and chapter membership
- Liaison with potential PMI members and encourage them to be members of the chapter
- Develop and implement a plan to recognize member milestones (such as anniversaries or awards)
- Develop and implement a member retention program
- Revise membership benefits and value on a regular basis
- Develop and implement membership welcome and support plan
- Answer general membership inquiries; respond to member/non-member information inquiries and other requests for assistance
- Act as the primary recipient for the Chapter Reporting System (CRS)
- Maintain the membership records of the chapter (CRS)
- Provide communication list/member updates to officers
- Coordinate the production and distribution of timely membership reports, such as monthly membership reports by demographics (city, state, age, industry, etc.)
- Develop and administer membership satisfaction survey/exit survey
- Ensure that members are aware of available services
- Work with marketing to develop a plan to implement outreach to the community including

commercial, not-for-profit and other professional associations about membership

- Support and attend annual general meeting
- Develop and implement succession and transition plan

ROLE SPECIFIC SKILLS:

- Proficiency in Data Analysis and Reporting
- Proficient in Email Communications (*e.g.*, MS Outlook, Google Mail)
- Knowledge of PMI Credentials
- Proficient use of Survey Tools/Market Research/Demographic Research
- Marketing Skills
- Proficient use of word processing, spreadsheet and presentation tools (*e.g.*, Microsoft Office, Open Office)

OTHER LEADERSHIP SKILLS:

- Public Speaking/Presentation Skills
- Active Listening Skills
- Team Building Skills

AVERAGE HOURS PER MONTH: 20 HOURS

VICE PRESIDENT OF OPERATIONS

ROLE DESCRIPTION: Elected volunteer responsible for preparing, maintaining, recording, circulating all records, correspondence, minutes of meetings, and related affairs of the chapter.

ROLES AND RESPONSIBILITIES:

- Maintain custody of the approved bylaws, articles of incorporation, charter agreement and of amendments thereto and board policies, committee charters, and all other non-financial records for the chapter
- Coordinate and distribute board meeting agendas
- Maintain all meeting minutes
- Notify membership not less than the period stated in the chapter bylaws before annual general meetings
- Circulate board agenda before the meeting to all the members
- Provide records to members and outside organizations that request information
- Provide all notifications to the membership, directors, auditors and members of committees
- Receive and dispatch general correspondence
- Provide support for membership communication
- Prepare for, procure and distribute chapter stationary and printed materials
- Develop and implement succession and transition plan

ROLE SPECIFIC SKILLS:

- Agenda and Meeting Coordination
- Ability to Scribe and Record Minutes
- Proficient use of word processing, spreadsheet, and presentation tools (*e.g.*, Microsoft Office, Open Office)
- Knowledge of Meeting procedures (*e.g.*, Roberts Rules)
- Knowledge of PMI Bylaws and Policies
- Knowledge of Records Retention requirements
- Proficient in Email Communications (*e.g.*, MS Outlook, Google Mail)
- Proficiency in Editing/Proofreading

OTHER LEADERSHIP SKILLS:

- Excellent Writing Skills
- Active Listening Skills
- Facilitation Skills
- Time Management Skills

AVERAGE HOURS PER MONTH: 20 HOURS

VICE PRESIDENT OF MARKETING AND PUBLIC RELATIONS

ROLE DESCRIPTION: Elected volunteer responsible for marketing and public relations. The VP of marketing shall be responsible for developing marketing, corporate relations and communication programs in accordance with chapter bylaws and policies.

ROLES AND RESPONSIBILITIES:

- Market and publicize the chapter within the community
- Develop an awareness of PMI's marketing tools and resources
- Develop and implement marketing campaigns to promote the chapter and its activities to members and the community at large
- Develop and implement a periodic marketing plan with a detailed marketing strategy to ensure chapter brand management
- Develop and implement the chapter marketing plan
- Create and disseminate the chapter's announcements, press releases and marketing activities
- Develop and distribute marketing materials, newsletter, *etc.*
- Facilitate chapter communications to external sources (local newspapers, radio stations and organizations) and share information with PMI and other PMI communities
- Keep the coherence between the marketing plan and the chapter strategic objectives
- Drive the chapter's advertisement process and ensure results
- Collaborate with local businesses to publicize the chapter and PMI
- Publicize the chapter and PMI through internal and external publications

- Oversee the relationship with the press and the relation with the public authorities, government bodies and non-governmental organizations
- Monitor and coordinate presentations to external stakeholders and other organizations interested in the activities of PMI
- Increase awareness of PMI and the chapter
- Maintain relationships with sponsors for revenue generation to fund the chapter's activities
- Coordinate and organize presentations to potential chapter sponsors, event sponsors and other sponsors
- Develop and implement succession and transition plan

ROLE SPECIFIC SKILLS:

- Marketing Strategy and Development
- Marketing Plan Execution and Delivery
- Knowledge of PMI's Brand Strategy (Marketing Portal)
- Market Research Skills/Proficient use of Survey Tools
- Proficient Usage of Online Collaboration/Tools (e.g., Facebook, LinkedIn) Newsletter Tools
- Knowledge of Fundraising Techniques

OTHER LEADERSHIP SKILLS:

- Public Speaking/Presentation Skills
- Excellent Writing Skills
- Ability to Delegate Effectively
- Negotiation Skills

AVERAGE HOURS PER MONTH: 20 HOURS

VICE PRESIDENT OF PROFESSIONAL DEVELOPMENT

VICE PRESIDENT OF PROGRAMS

These two positions share similar responsibilities with the VP of Professional Development emphasizing chapter activities associated with ongoing educational opportunities for the members and the VP of Programs emphasizing special events and the management of educational providers.

ROLE DESCRIPTION: Elected volunteer responsible for professional development, education and chapter events in accordance with chapter policies and bylaws.

ROLES AND RESPONSIBILITIES:

- Define strategies for improvement in professional development/training programs
- Develop and implement a chapter professional development plan, including a program roadmap for professional development content programs

- Develop plans for and coordinate the chapter's external educational activities, such as study groups, seminars, workshops, courses, professional development days and other educational activities
- Oversee soft skills development and training programs
- Manage chapter-created credential examination review courses and other such courses
- Provide information to members and nonmembers on career development
- Provide information and guidance to members and nonmembers on certification/re-certification in the context of PMI
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter regarding the contents of programs
- Provide the information necessary to market the education, certification, as well as training opportunities offered by the chapter
- Recommend, develop and deliver project management education materials, courses, presentations and sessions
- Provide the information necessary to market the education, PMI certification, as well as training opportunities offered by the chapter
- Develop and implement a plan for educational outreach at the elementary, secondary and collegiate levels
- Seek new project management professional development programs and services through networking with other educational organizations and PMI chapters
- Coordinate and publicize/organize chapter social networks
- Promote the project management profession through the planning and coordination of special events, as identified by the chapter board, designed to enhance and expand the skills and knowledge of project managers
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter as they relate to the logistics of events/programs
- Oversee events, presentations and training programs
- Invite key influencers from industry to participate in community events
- Plan and coordinate special events, as identified by the chapter's board, designed to enhance the project management professions and/or expand the skills and knowledge of project managers
- Develop and implement a program roadmap for all events
- Advance the project management profession through the planning and coordination of special events, as identified by the chapter's board
- Develop and implement a succession and transition plan

ROLE SPECIFIC SKILLS:

- Program and Event Planning Skills
- Ability to Develop and Manage Program and Event Schedules
- Knowledge of PMI Credentials and PDUs

- Content and Curriculum Development
- Contract and Vendor Management
- Ability to Create and Analyze Program Surveys and Evaluations
- Basic Budget Management Skills

OTHER LEADERSHIP SKILLS:

- Ability to Delegate Effectively
- Public Speaking/Presentation Skills
- Team Building Skills
- Facilitation Skills
- Time Management Skills
- Adaptability/Flexibility

AVERAGE HOURS PER MONTH: 18 HOURS