2011 PMI
Volunteer Role Delineation Study Results
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About this Brochure
Along with providing background information and reasoning behind the Role Delineation Study, this brochure briefly describes and summarizes the study and its results. Perhaps more importantly, it includes full descriptions of the ten most frequently used PMI Chapter Board Director roles.

Introduction
With over 270 chapters around the world, each with different challenges, cultures and traditions, it is not surprising that there are over 406 volunteer leader titles in the Component System. Many of these titles, however, refer to very similar roles across chapters, regardless of the geographic region in which these chapters are based.

The purpose of this study is to help PMI develop a consistent approach to how the PMI Chapter Volunteer Roles are described and, thus, how PMI can more effectively provide relevant and timely development opportunities to our volunteers on a global level.

The results of this study will assist in content development for face-to-face Leadership Institute Meetings and virtual learning activities available via PMI Learn. Additionally, it will assist in the volunteer recruitment process by enabling PMI to more clearly post and describe volunteer roles and will ultimately help to advance leadership continuity.

Volunteer Role Delineation Study Methodology
PMI solicited input and sought consensus from approximately 300 leaders, representing chapters from around the world regarding the important roles and activities of chapter volunteers. This study was conducted through a series of five volunteer workshops, studying ten of the most prevalent elected roles at the chapter level. These roles included:

- President
- Secretary
- Vice President/President Elect
- Vice President of Finance/Treasurer
- Vice President Membership/VP of Member Services
- Vice President of Governance and Policy
- Vice President of Volunteers
- Vice President Marketing
- Vice President of Professional Development/VP of Education
- Past President

The results of these workshops were then validated by 407 PMI volunteers. Here are the survey statistics:

- 2195 current chapter leaders received an email invitation to a web-based survey
- 502 leaders responded to the survey, of which 407 qualified to participate
- 25% response rate
- Leaders rated up to two out of the ten roles, depending on which roles they currently hold or previously held
- 2-week field period: 8/18/11–9/2/11
Volunteer Role Delineation Study Results

Regardless of the role, four leadership skills were identified as essential to all volunteer roles included in the study, and they are:

- Communications Skills
- Organizational Skills
- Relationship Building/Networking Skills
- Strategic Thinking — Skilled in Strategic Planning Process and Execution

The results of the study are organized into the following categories:

- Role Description
- Roles and Responsibilities
- Deliverables
- Role Specific Skills
- Other Leadership Skills (in addition to those listed above)
- Average Volunteer Hours Per Month

Future Role Studies

This study is part of a larger effort to better meet the needs of all of PMI’s global volunteers. Additional role studies are planned for additional chapter roles, as well as communities of practice and all of the Institute’s volunteer leadership roles.

To ensure that the roles remain relevant to changing conditions, the Chapter Volunteer Role Study will be refreshed on a three-year cycle.

This information is accessible online in PMI Learn, with the title “2011 PMI Role Delineation Results.”

To access PMI Learn, complete the following steps:

1. Go to PMI.org and log in using your username and password
2. Once logged in, hover over “Get Involved” and click “Excel as a leader”
3. Scroll to the bottom of the page and click the “Launch PMI Learn” button
4. You will now be placed in PMI Learn
5. Once inside the PMI Learn Homepage, locate the “Required Training” Box
6. Click the title hyperlink to view the document

Questions or comments: Please contact: leadership.Institute@pmi.org

PMI thanks you and all of the volunteers who participated in this important study.
Volunteer Chapter Role Descriptions

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

DELIVERABLES: Pending Volunteer Input – Based on the Outcome of Strategic and Operational Planning per Chapter

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: **22 HOURS**
SECRETARY

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 — must document in accordance to specific parliamentary procedures as mandated by their local government (e.g., Roberts Rules)
- 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

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

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 as mandated by their local government (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
- English Proficiency (29% highest of any role)

AVERAGE HOURS PER MONTH: **11 HOURS**
VICE PRESIDENT/PRESIDENT ELECT

ROLE DESCRIPTION: Successor to the president; elected volunteer who will assist the president with his or her duties of managing the chapter and assume the role of the chapter president if the president is unable to perform duties for any reason.

ROLES AND RESPONSIBILITIES:
- Represent the president in his or her absence
- Assume the role of president the year following successful completion of his or her duties in this role (depending on chapter bylaws)
- Assume the role of president if the president is unable to perform duties for any reason
- Assist the president in his or her duties
- Oversee the operations committee
- Serve as member ex-officio with the right to vote on all committees except the nominating committee
- Develop and implement succession and transition plan

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- PMI Knowledge and Experience
- Resource Management
- Conflict Management
- Budget Management
- Financial Planning

OTHER LEADERSHIP SKILLS:
- Team Building Skills
- Active Listening Skills
- Ability to Delegate Effectively
- Public Speaking/Presentation Skills

AVERAGE HOURS PER MONTH: 12 HOURS
VICE-PRESIDENT OF FINANCE/TREASURER/FINANCE DIRECTOR

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

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- Documentation Skills/Financial Record Keeping
- Knowledge of Financial Planning
- Knowledge of Generally Accepted Accounting Principles (GAAP)
- Accounting Software/Tools (e.g., Quick Books, Excel)
- Analytical Thinking
- Legal Awareness
- Basic Knowledge of Economics

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

AVERAGE HOURS PER MONTH: 13 HOURS
VP MEMBERSHIP/VP OF MEMBER SERVICES/MEMBERSHIP DIRECTOR

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 Data Exchange Program (DEP)
- Maintain the membership records of the chapter (DEP)
- 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

DELIVERABLES: Pending Volunteer Input - Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- Proficiency in using PMI Data Exchange Program (DEP)
- 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: 12 HOURS
VP OF GOVERNANCE AND POLICY/GOVERNANCE AND POLICY DIRECTOR

ROLE DESCRIPTION: Elected volunteer responsible for addressing governance and policy issues, including ensuring the maintenance and enforcement of chapter policies and bylaws.

ROLES AND RESPONSIBILITIES:
- Ensure the policies are consistent and compliant with all applicable governmental jurisdiction and regulations (e.g., IRS, Government Compliance, PMI Policy, Sarbanes Oxley)
- Review and update bylaws
- Ensure the chapter and/or bylaws are upheld and enforced
- Develop and maintain policy manual
- Develop a transition and succession plan
- Oversee PMI Global Operating Center and chapter policy and identify any gaps
- Develop and maintain information security/personal information policy
- Ensure and oversee roles/function definitions
- Address any breaches that may be brought up against a member and/or the chapter
- Assist in resolving chapter conflicts
- Raise awareness of and provide training on code of conduct/regulations/processes
- Oversee and ensure smooth transition and transition planning
- Be aware of the Ethics Review Process
- Perform as region liaison for the chapter
- Develop and implement succession and transition plan

DELIVERABLES: Pending Volunteer Input - Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- Policy Development Experience
- Organizational Change Management
- Knowledge of PMI Ethical Code and Guidelines
- PMI Knowledge and Experience
- Experience with Developing Roles and Responsibilities
- Association/Not-for-Profit Knowledge
- Experience with Transition and Succession Planning Experience with Local Regulations and Laws

OTHER LEADERSHIP SKILLS:
- Conflict Resolution Skills
- Negotiation Skills
- Excellent Writing Skills
- Team Building Skills
- Active Listening Skills

AVERAGE HOURS PER MONTH: 11 HOURS
VP OF VOLUNTEERS OR VOLUNTEER COORDINATOR

ROLE DESCRIPTION: Elected volunteer responsible for addressing the needs of the volunteers, including recruitment, retention, recognition and leadership development training and support in accordance with chapter policies and bylaws.

ROLES AND RESPONSIBILITIES:
- Responsible for volunteer recruitment and/or retention
- Responsible for providing clear expectations to volunteers regarding their roles
- Understand and leverage experience of volunteers and direct them to various initiatives in the chapter
- Responsible for identifying and developing programs to involve, develop, engage and manage volunteer members
- Responsible for the development and recognition of volunteers
- Build quality into volunteering by introducing and refining different processes for managing the work from volunteers
- Develop and implement succession and transition plan
- Responsible for providing PMI volunteer awareness at the local and global levels.

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- Understanding of Volunteer Resource Management
- Understanding of Volunteer Recognition and Appreciation Programs
- Ability to use Volunteer Management Software Tools to match volunteer skills with interests
- Proficient in Email Communications (e.g., MS Outlook, Google Mail)
- Proficient Usage of Online Collaboration/Tools (e.g., Facebook, LinkedIn)

OTHER LEADERSHIP SKILLS:
- Active Listening Skills
- Coaching and Mentoring
- Team Building Skills
- Ability to Delegate Effectively
- Conflict Resolution Skills
- Persuasion Skills

AVERAGE HOURS PER MONTH: 10 HOURS
VP MARKETING/MARKETING DIRECTOR

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

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

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: 14 HOURS
VP OF PROFESSIONAL DEVELOPMENT/VP OF EDUCATION/ PROFESSIONAL DEVELOPMENT DIRECTOR/EDUCATION DIRECTOR/VP OF EVENTS

Over time, many chapters will divide this role into two separate roles: VP of education and VP of professional development

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

- Responsible for the development of chapter education activities to include:
  - Preparation and maintenance of PMI’s certifications
  - Develop and maintain relationships with local colleges and universities
  - Serve as liaison to the PMI Educational Foundation

- Responsible for establishing and managing chapter professional development programs, live and on-line, maintain relationships with Registered Education Providers (R.E.P.s)

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
DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

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: **15 HOURS**
PAST PRESIDENT

ROLE DESCRIPTION: Immediate former elected volunteer responsible for overall oversight of the chapter and the board in accordance with chapter policies and bylaws.

ROLES AND RESPONSIBILITIES:
- Maintain continuity in the chapter to help to ensure smooth board transitions
- Assist the board of directors with strategic policies
- Proactively support and promote the work within the board
- Assume the role of mentor for the president
- Assume the position of chair for the nominating committee
- Lead and direct the elections process
- Provide ethics enforcement and guidance at the board of directors level
- Support conflict resolution
- Outreach with past presidents
- Develop and implement a succession and transition plan

DELIVERABLES: Pending Volunteer Input — Based on Outcome of Strategic and Operational Planning per Chapter

ROLE SPECIFIC SKILLS:
- Skilled in Strategic Planning Process
- Diplomacy
- Understanding of Volunteer Recognition and Appreciation Programs
- Parliamentary Procedures (i.e., Roberts Rule of Order)
- Human Resource Management

OTHER LEADERSHIP SKILLS:
- Coaching and Mentoring
- Conflict Resolution Skills
- Facilitation Skills
- Active Listening Skills
- Team Building Skills

AVERAGE HOURS PER MONTH: 9 HOURS
GOOD THINGS HAPPEN WHEN YOU STAY INVOLVED WITH PMI.