

# PMI BUFFALO CHAPTER ELECTIONS – 2024

## OPEN POSITION DESCRIPTIONS & RESPONSIBILITIES

### VP, Certification Training

**Primary Position Description:** Elected or appointed volunteer responsible for certification training. These activities shall be performed in accordance with chapter bylaws and PMI policies.

#### **Responsibilities:**

- Develop and implement a chapter certification training plan, including a program roadmap for offering PMI certification and other non-PMI training
- Maintain relationships with Registered Education Providers (R.E.P.s) that provide certification training within PMI's Approved Trainer Program (ATP).
- Seek new project management certification training programs and services through networking with other educational organizations and PMI chapters
- Develop and maintain relationships with local colleges and universities in cooperation with PMI Buffalo's Outreach team
- Develop plans for and coordinate the chapter's external certification training activities, such as study groups, 3<sup>rd</sup> party courses, and other educational activities
- Provide information and guidance to members and non-members 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 content of programs
- 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 training
- Oversee training programs and benefit they deliver to the chapter, including financial benefit
- Work with the Marketing & Communications function to promote the training opportunities offered by the chapter
- 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
- Responsible for helping to develop the role and responsibilities of the position and provide on-boarding support for new volunteers
- Manage activities of all volunteers assigned to this function
- Develop the function's team and hold regular team meetings
- Develop and implement a succession and transition plan
- Participate in monthly Board meetings
- Participate in the chapter's annual planning

### VP, Marketing & Communications

**Primary Position Description:** Elected or appointed Volunteer responsible for Marketing & Communications. The VP is responsible for addressing the 3 below areas of responsibility. These activities shall be performed in accordance with chapter bylaws and PMI policies, brand guidelines and global marketing strategy.

- **Marketing:** Responsible for chapter-based marketing and public relations to increase awareness of both the chapter and the PMI brand within the territory. The VP will develop and execute an integrated marketing and public relations program to support member acquisition, member retention, event promotion, outreach activities, sponsorships and other related activities in alignment with the chapter's strategic objectives.
- **Communications:** Responsible for managing and coordinating communication channels in accordance with chapter policies and bylaws.

- **Social Media:** Responsible for implementing, optimizing, moderating and maintaining social media for the chapter in line with the chapter's social media policy, communication/marketing plan and PMI's Social Media Guidelines and brand standards for chapters.

#### **Responsibilities:**

- Develop, implement and execute an integrated marketing program aligned with the chapter's strategic objectives
- Monitor, optimize and analyze all marketing activities according to defined KPIs
- Define and regularly update chapter communication and social media strategy, crisis communications plan, policies, goals, and objectives
- Maintain and execute an annual communications and social media schedule that details all chapter communications across all channels including chapter membership and other external audiences; supervise and support all communication channel activities of the chapter
- Collaborate with local businesses and academic institutions, where appropriate, to publicize the chapter and PMI
- Develop and execute an annual and long-term Sponsorship program that supports the chapter's objectives, while maintaining relationships with existing sponsors for continued revenue generation to fund the chapter's activities and events
- Balance the need for timely communication with the goal to keep communication concise, timely and appropriate
- Ensure brand consistency within the chapter to PMI's brand positioning by reviewing chapter website, communications and marketing materials
- Plan and purchase print and digital advertising and coordinate with communications and social media
- Access PMI's Marketing Portal and review regularly to identify useful PMI-provided marketing resources
- Work with local vendors to develop marketing materials in accordance with PMI brand guidelines, if suitable materials are not available in the Marketing Portal
- Monitor and coordinate branded presentations and messaging to external stakeholders and other organizations interested in PMI products and services
- Coordinate, create and organize presentations to chapter members, for use at chapter events and other opportunities
- Create and manage the chapter's approved MARCOM budget, in cooperation with finance officer
- Help to develop the role and responsibilities of the position and provide on-boarding support for new volunteers
- Manage activities of all volunteers assigned to this function
- Develop the function's team and hold regular team meetings
- Develop and implement a succession and transition plan
- Participate in monthly Board meetings
- Participate in the chapter's annual planning

#### **VP, Outreach**

**Primary Position Description:** Elected or appointed Volunteer responsible for Outreach. The VP of Outreach is responsible for developing a strategy and implementing programs that form sustainable partnerships and yield mutual benefits for four areas: community, professional organizations, corporate organizations and educational institutions. These activities shall be performed in accordance with chapter bylaws and PMI policies.

#### **Responsibilities:**

- Work with the Chapter's Board of Directors and Chapter Partner to develop an overall strategy and objectives for the areas of Outreach that support the objectives of the chapter and PMI GOC
- Develop and implement innovative programs to support the Outreach strategy
- Develop goals/objectives to measure Outreach success. Develop metrics to measure success of Outreach programs
- Develop strategies and programs to support the establishment of "partnerships" for mutual benefit with community, professional organizations, corporate organizations and academic institutions that help promote the chapter and the project management profession. Evaluate and maintain Outreach partnerships
- Monitor activities of Outreach volunteers assigned to manage the program
- Maintain a record of local Outreach contacts

- Manage and maintain Outreach budget
- Utilize available PMI Outreach volunteer resources to support designated outreach activities (found on the marketing portal)
- Provide input to PMI's Outreach staff that will contribute to the development of outreach resources and services for chapter use (found on the marketing portal)
- Report monthly progress to the Chapter's BOD and for the annual chapter business planning with Chapter Partner
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter as they relate to Outreach resources and services
- Enhance executive-level awareness of Outreach programs that should be considered for the chapter and its members
- Act as primary Lead for developing outreach activities which may include oversight of Outreach Committee Volunteers
- Responsible for making local organizations/institutions aware of PMI and the benefits of chapter support, and PMI products/programs/initiatives relevant to an outreach audience
- Responsible for identifying and developing programs to involve, develop, engage and manage stakeholders
- Assure synergy between outreach projects/activities
- Gather lessons learned and develop procedures to ensure consistent messaging across outreach activities
- Attend regularly scheduled Outreach team meetings/conference calls and selected meetings
- Create articles for chapter communications on Outreach activities
- Responsible for helping to develop the role and responsibilities of the position and provide on-boarding support for new volunteers
- Manage activities of all volunteers assigned to this function
- Develop the function's team and hold regular team meetings
- Develop and implement a succession and transition plan
- Participate in monthly Board meetings
- Participate in the chapter's annual planning

## **VP, Professional Development**

**Primary Position Description:** Elected or appointed Volunteer responsible for professional development programs. The VP of Professional Development is responsible for developing a strategy and implementing programs to deliver professional development opportunities to members and followers. These activities shall be performed in accordance with chapter bylaws and PMI policies.

### **Responsibilities:**

- Define strategies for improvement in professional development 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 educational activities, such as seminars, workshops, professional development days and other educational activities
- Provide information to members and nonmembers on career development
- Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter regarding the contents of programs
- Work with Marketing & Communications function to promote education opportunities offered by the chapter
- Recommend, develop and deliver project management education materials, presentations and sessions including leadership development training programs
- Seek new project management professional development programs and services through networking with other educational organizations and PMI chapters
- 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 and presentations
- Invite key influencers from industry to participate in chapter events

- Maintain the role and responsibilities of the position and provide on-boarding support for new volunteers
- Manage activities of all volunteers assigned to this function
- Develop the function's team and hold regular team meetings
- Develop and implement a succession and transition plan
- Participate in monthly Board meetings
- Participate in the chapter's annual planning

## **VP, Technology & Business Services**

**Primary Position Description:** Elected or appointed Volunteer responsible for Technology & Business Services. The VP is responsible for working with the Chapter's Board of Directors to develop an overall strategy for the areas of Technology and Business Services that support the objectives of the chapter and PMI GOC. These activities shall be performed in accordance with chapter bylaws and PMI policies.

### **Business Services Responsibilities:**

- Support & Execute the Annual Audit Process
- Along with Membership Team, assist with onboarding new volunteers
- Support annual election process

### **Technology Responsibilities:**

- Maintain PMI Global information with current information related to board and directors
- Support the chapter Website / primary contact with Web service provider (Dark Rhino 2020)
- Provide guidance and support for all applications – primarily with Google Workspaces, ClickUp, Canva, HootSuite, SurveyMonkey, WebEx, MS-Office 365 (on three PMI-owned laptops), and Dark Rhino Website.
- Accounting and budgeting of all free and paid applications used to support the chapter.

### **Overall Responsibilities:**

- Develop, manage and maintain the Technology & Business Services budget
- Participate in monthly Board meetings
- Participate in the chapter's annual planning
- Maintain the role and responsibilities of the position and provide on-boarding support for new volunteers
- Manage activities of all volunteers assigned to this function
- Develop the function's team and hold regular team meetings
- Develop and implement a succession and transition plan
- Maintain a record of technology and business services contacts

## **Trustee**

A Trustee is a former member of the Board. S/he will promote the development of the Chapter and provide continuity of policies and procedures through the application of historical knowledge and best practices. The chapter will have two (2) trustees, they may vote in board matters.

## **President-elect**

**Note:** *The President-elect works side by side with the current President during a transition period to prepare to fulfill the role of President.*

**Primary Position Description:** Elected volunteer responsible for oversight of the chapter and the board. This volunteer directs, has an overview of, and coordinates the activities of the other board members in accordance with the chapter bylaws.

### **Responsibilities:**

#### **1. Mission, policy, and strategic planning**

- Define the chapter's strategic goals, chapter values, vision, and mission with input and approval from the board.
- Direct the achievement of the agreed upon goals by the chapter board.
- Help the board evaluate value to the membership.

- Keep the board fully informed of internal and external factors influencing the chapter such as key updates to PMI's strategy, changes to government guidelines etc.
- Keep the board and PMI apprised of the progress of the chapter's strategic plan, objectives and key performance indicators.
- Foster establishment of strategic alliances with other entities/chapters in support of achievement of chapter goals and objectives.
- Ensure chapter functions in alignment to PMI policies and guidelines.
- Ensure chapter bylaws and policies are regularly reviewed and updated.

## **2. Management and administration**

- Assume responsibility for the overall functioning of the chapter.
- Lead the chapter board in achieving the vision, mission and objectives as detailed in chapter business plans.
- Preside over the board of directors' meetings (or board meeting).
- Ensure fair practices in all chapter board decision making process.
- Ensure that the charter renewal is completed on or before the deadline set by PMI and that the chapter complies as specified by PMI.
- Legally represent the organization (can be co-dependent with another VP as determined by the board or as mentioned in the Chapter bylaws).
- Be ultimately accountable for all board operations and chapter activities.
- Ensure that chapter business is conducted legally and ethically.
- Ensure statutory and regulatory compliance in consultation with the VP/Director of Governance or Chapter Secretary.
- Act as a general point of contact between the chapter and PMI; other members of the board would still reach out to PMI on their specific topics.

## **3. Members, organizations, and partners**

- Prioritize membership value in all chapter activities.
- Ensure that services to members meet or exceed the targets specified in the annual plan and objectives as agreed by the chapter board.
- Engage and maintain relationships with all related parties and partners of the chapter, guiding the chapter along the journey towards its vision.
- Ensure a continual membership "pulse check" to understand member satisfaction, challenges, and remediation in collaboration with VP or Director of Membership.
- Represent the chapter at events or delegate it to the relevant proxy.
- Preside over the annual general meeting or equivalent.

## **4. Leadership, Staff and Volunteers**

- Demonstrate leadership within the chapter and to the community.
- Ensure that the chapter board works together as a team to achieve chapter goals, mission, and vision.
- Ensure that volunteers are recognized for their achievements.
- Ensure that chapter staff are compensated as per their employment terms.
- Provide guidance to and encourage other chapter leaders to develop their leadership capabilities.
- Develop and implement a succession and transition plan for the chapter board.

## **5. Financing**

- Ensure that the operation of the organization and any projects run by the chapter are financially sound and will deliver appropriate value to members.
- Work with the board and finance portfolio to ensure adequate financing is allocated to meet the needs of the short- and long-term strategy.
- Work with the finance portfolio to ensure tax compliance of the chapter.
- With the board, ensure prudent use and disbursement of chapter funds.

## **Additional Responsibilities for PMI Buffalo Chapter:**

- Oversees Chapter's annual Budget Planning activities, with support from VP Finance, and delivering an approved budget by December 31<sup>st</sup> for upcoming year.
- Responsible for developing and publishing Chapter Annual Report, Annual Plan & Catalog of Core Services.
- Responsible for holding annual orientation sessions for Board and Directors.

- Responsible for annual Insurance Renewal filing with PMI Global.
- Responsible for reviewing annual surveys – from PMI Global and Chapter – and taking action to improve membership value and feedback.
- Attend majority of Chapter events to demonstrate support and leadership.
- Engage in resolution of Board / Director / Member / Prospect concerns and issues when VP level cannot address on its own.
- Responsible for reviewing and providing feedback on all new vendor/partner/venue contracts before Board members sign.