

Roles and Responsibilities

Version 3.0



www.pmikerala.org

Prepared on 26 Dec 2024

PMI Kerala Chapter Board Officer Roles

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Role Name	PRESIDENT	Tenure	2 years
Type of Role	Executive & Signatory Role	Average Monthly Volunteer Hours	40

ROLE 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.

ROLES AND RESPONSIBILITIES

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.

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 processes.
- 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 codependent 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.

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.

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.

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.

BUSINESS ACUMEN SKILLS:

- Organizational management
- PMI knowledge and experience
- Volunteer recognition and appreciation
- Forecasting/trend analysis — membership statistics, financial stability, etc.

OTHER LEADERSHIP SKILLS

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

POWER SKILLS:

- Coaching and mentoring
- Conflict resolution
- Process execution
- Team building

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 3.
<p>The President shall be the Chief Executive Officer for the PMI KERALA CHAPTER and of the Board and shall perform such duties as are customary for presiding officers, including making all required appointments with the approval of the Board.</p> <p>The President shall also serve as member ex-officio with the right to participate and vote on all committees except the Nominating Committee.</p> <p>The President Elect shall shadow the President for one year and shall automatically move to the role of President at the end of term of the President. The President Elect shall assume the responsibilities of the President in their absence.</p>	

Typical Measurable Objectives

Item	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	90%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Conduct Strategic Planning Meeting	1 meeting
15	Conduct Transition and Succession Planning Meeting	1 meeting
16	Plan and conduct Board of Directors Meetings	10 meetings
17	Plan and conduct Annual Business Meeting	1 meeting

18	Prepare Annual Report for members	1 report
19	Budgetary Goals met	12 months
20	Chapter in compliance with local laws	2x checked
21	Represent Chapter	3 meetings
22	Volunteer to Chapter Conference / National Conference	1 track
23	Volunteer to Chapter Trainings	4 days
24	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT OPERATIONS	Tenure	2 years
Type of Role	Non Executive Signatory Role	Average Monthly Volunteer Hours	40

ROLE DESCRIPTION

Elected volunteer responsible for preparing, maintaining, recording and circulating all records, correspondence, meeting minutes (both board meetings and membership meetings), and related affairs of the chapter.

ROLES AND RESPONSIBILITIES

1. Assure safekeeping of all governing documents (member-ratified bylaws, articles of incorporation/ registration, charter agreement, board policies, committee charters, list of chapters fixed assets, contractual agreements, and all other non financial records for the chapter).
2. Coordinate and schedule monthly board meetings.
3. Coordinate and distribute meeting agendas.
4. Keep the records, including action items, of all business meetings of the chapter and meetings of the board.
5. Maintain all meeting minutes, with documentation in accordance with parliamentary procedures as determined by the board.
6. Coordinate the Annual Meeting notification to all members. Notice of all annual meetings shall be sent at least 30 – 45 days in advance of the meeting as outlined in the chapter’s bylaws. Action at such meetings shall be limited to those agenda items contained in the notice of the meeting.
7. Coordinate with the board to develop the annual report.
8. Provide records to members and outside organizations that request information if appropriate and upon approval and request of the board, excluding personally identifiable records.
10. Provide governance and compliance notifications to the membership, directors, auditors, and members of committees as needed (i.e., elections, annual meeting, bylaws ratification).
11. Coordinate distribution of all general
12. correspondence.
13. Provide support for membership communication.
14. Oversee coordination of printed materials (logo items, business cards, etc.).
15. Collate an annual plan deliverable from each chapter leader and develop an annual plan matrix as defined by the Catalog of Core Services, track progress of the agreed deliverables and report status updates to the board and PMI.
16. Ensure chapter policies and public documents are written using inclusive language (or work with respective board members to ensure the language used is inclusive).

17. Ensure all chapter documents are saved in a shared location as determined by the board.
18. Develop and implement succession and transition plans for the role.
19. Responsible for overseeing the chapter repository and associated board files (getting the licensing of electronic tools, managing access and keeping track of document inventory)

BUSINESS ACUMEN SKILLS:

- Ability to record minutes
- Knowledge of chapter bylaws and pmi policies
- Knowledge of parliamentary meeting procedures
- Knowledge of pmi bylaws and policies
- Knowledge of records retention requirements
- Meeting coordination

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, Gmail)
- Proficiency in Editing/Proofreading

POWER SKILLS:

- Excellent writing
- Time management
- Facilitation
- Time Management Skills
- English Proficiency (29% highest of any role)

Bylaw reference section

Article V – PMI KERALA CHAPTER Board of Directors:Section 4

The Vice President Operations shall convene regular board meetings, AGM and other chapter meetings and shall keep the records of all such business meetings of the PMI KERALA CHAPTER and meetings of the Board.

The Vice President Operations shall also ensure that the statutory compliance tasks are scheduled and tracked to closure.

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Maintains custody of chapter records and governance documents	Monthly
15	Email Chapter newsletter	10
16	Notify members of Annual Meeting	Annual
17	Maintain calendar of events	Monthly

18	Inventory of Chapter supplies and/or assets	Monthly
19	Maintain and review Board contact list	Monthly
20	Manage general correspondence	Monthly
21	Volunteer to Chapter Conference / National Conference	1 track
22	Volunteer to Chapter Trainings	4 days
23	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT FINANCE	Tenure	2 years
Type of Role	Non Executive Signatory Role	Average Monthly Volunteer Hours	40
Associated Volunteer Roles	AVP 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

1. 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
2. Establish and maintain all required chapter bank accounts and/or similar financial transactions; arrange for officer signatures as required
3. 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)
4. Report on the state of finances at board meetings and chapter meetings
5. Develop an annual operating budget and financial statement to be included in the annual application for charter renewal

6. Ensure the chapter has reviewed and reported required tax filings
7. Recommend improvements in the financial processes to the board
8. Establish and maintain financial operational processes to ensure continuity of chapter operations and define, document and maintain chapter policies
9. Maintain the annual budget
10. Contribute to financial planning/goal setting, investing, forecasting and budgeting for the chapter
11. Distribute/communicate financial section of the annual report to chapter membership
12. Assist in the preparation of the annual financial statements and reports
13. Provide timely information to independent auditors as required
14. Keep an up to date inventory of all the goods of the chapter
15. Handle all PMI and government required payments
16. Ensure maintenance and storage of all historic financial documents
17. Establish financial metrics; ensure chapter is maintaining requirements
18. Serve as liaison with PMI Global Operating Center on financial matters
19. Prepare financial guidelines and procedures for the chapter along with board
20. Analyze cost impact and income benefit of all activities proposed by the board of directors
21. Review any chapter contract, agreement and insurance
22. Distribute information, materials and/or fees received from the PMI Global Operating Center to appropriate officers in a timely manner
23. Confirm and check bank accounts monthly
24. 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
- Adaptability/Flexibility (e.g., WebEx, Live Meeting, Registration and Event Software)

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 5
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The Vice President Finance shall oversee the management of funds for duly authorized purposes of the PMI KERALA CHAPTER.

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Financial Reports	12 Reports
15	Develop Annual Operating Budget	1 Budget
16	Prepare financial statement for Annual Report	Annual
17	Met established budget and financial metrics	Monthly

18	Volunteer to Chapter Conference / National Conference	1 track
19	Volunteer to Chapter Trainings	4 days
20	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT MEMBERSHIP	Tenure	2 years
Type of Role	Non Executive Non Signatory	Average Monthly Volunteer Hours	30
Associated Volunteer Roles	AVP Membership, Lead 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

1. Develop and maintain a chapter membership plan that assures continued growth through proactive recruiting and partnering with major area employers
2. Promote the value of PMI and chapter membership
3. Liaison with potential PMI members and encourage them to be members of the chapter
4. Develop and implement a plan to recognize member milestones (such as anniversaries or awards) • Develop and implement a member retention program
5. Revise membership benefits and value on a regular basis
6. Develop and implement membership welcome and support plan
7. Answer general membership inquiries; respond to member/non-member information inquiries and other requests for assistance
8. Act as the primary recipient for the Data Exchange Program (DEP)
9. Maintain the membership records of the chapter (DEP)
10. Provide communication list/member updates to officers
11. Coordinate the production and distribution of timely membership reports, such as monthly membership reports by demographics (city, state, age, industry, etc.)
12. Develop and administer membership satisfaction survey/exit survey
13. Ensure that members are aware of available services
14. Work with marketing to develop a plan to implement outreach to the community including commercial, not-for-profit and other professional associations about membership
15. Support and attend annual general meeting
16. Develop and implement succession and transition plan

ROLE SPECIFIC SKILLS

- Proficiency in using PMI Data Exchange Program (DEP)
- Data Analysis and Reporting
- Proficient in Email Communications (e.g., MS Outlook, Gmail)
- 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

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 6
Vice President Membership shall own all the activities related to member growth, engagement, and retention, working with the rest of the Board.	

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity and Membership Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Recognition plan for member milestones	1 plan
15	Member retention program	1 plan
16	Survey of member satisfaction	1 survey
17	Outreach program	12 contacts

18	Member mailing list maintenance	Monthly
19	Volunteer to Chapter Conference / National Conference	1 track
20	Volunteer to Chapter Trainings	4 days
21	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT VOLUNTEERS	Tenure	2 years
Type of Role	Non Executive Non Signatory	Average Monthly Volunteer Hours	20
Associated Volunteer Roles	AVP Volunteers, Lead Volunteers		

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

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

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, Gmail)
- Proficient Usage of Online Collaboration/Tools (e.g., Facebook, LinkedIn, Twitter)

OTHER LEADERSHIP SKILLS

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

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 7
Vice President Volunteers shall own all the activities related to volunteer development and engagement, working with the rest of the Board.	

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc's for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Recruit volunteers	1 pool

15	Create and review volunteer recognition program	2x annually
16	Implement and review volunteer transition and succession plan	1 plan
17	Volunteer to Chapter Conference / National Conference	1 track
18	Volunteer to Chapter Trainings	4 days
19	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT PROFESSIONAL DEVELOPMENT	Tenure	2 years
Type of Role	Non Executive No Signatory	Average Monthly Volunteer Hours	20
Associated Volunteer Roles	AVP Professional Development, Lead Professional Development		

ROLE DESCRIPTION

Elected volunteer responsible for professional development and education in accordance with chapter policies and bylaws.

Responsible for establishing and managing chapter professional development programs, live and on-line, education and certification in accordance with chapter policies and bylaws.

Responsible for the development of chapter education activities.

ROLES AND RESPONSIBILITIES

1. Define strategies for improvement in professional development programs
2. Develop and implement a chapter professional development plan, including a program roadmap for professional development content programs
3. Develop plans for and coordinate the chapter's external educational activities, such as seminars, workshops, courses, professional development days and other educational activities
4. Oversee soft skills development
5. Provide information to members and nonmembers on career development
6. Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter

- regarding the contents of programs
7. Define strategies for improvement in training programs
 8. Develop plans for and coordinate the chapter's external educational activities, such as study groups and other educational activities and Oversee training programs
 9. Manage chapter-created credential examination review courses and other such courses
 10. Provide information and guidance to members and nonmembers on certification/re-certification in the context of PMI
 11. Incorporate feedback, suggestions and recommendations as necessary to enhance effectiveness and value delivered to the audience and chapter regarding the contents of programs
 12. Provide the information necessary to market the education, certification, as well as training opportunities offered by the chapter
 13. Recommend, develop and deliver project management education materials, courses, presentations and sessions
 14. Provide the information necessary to market the education, PMI certification, as well as training opportunities offered by the chapter
 15. Seek new project management professional development programs and services through networking with other educational organizations and PMI chapters
 16. Coordinate and publicize/organize chapter social networks
 17. 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
 18. 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
 19. 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
 20. Advance the project management profession through the planning and coordination of special events, as identified by the chapter's board
 21. 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
- 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

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 8
Vice President Professional Development shall own all the activities related to professional development of member community and potential member community and their education and training, working with the rest of the Board.	

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Plan and conduct educational events	24 events
15	Credential review courses	Quarterly
16	Soft skills training program	1 plan

17	Plan and conduct special events	1 Symposium
18	Career development information event	2 events
19	Volunteer to Chapter Conference / National Conference	1 track
20	Volunteer to Chapter Trainings	4 days
21	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT MARKETING	Tenure	2 years
Type of Role	Non Executive No Signatory	Average Monthly Volunteer Hours	20
Associated Volunteer Roles	AVP Marketing, Lead Marketing		

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

1. Market and publicize the chapter within the community
2. Develop an awareness of PMI’s marketing tools and resources
3. Develop and implement marketing campaigns to promote the chapter and its activities to members and the community at large
4. Develop and implement a periodic marketing plan with a detailed marketing strategy to ensure chapter brand management
5. Develop and implement the chapter marketing plan
6. Create and disseminate the chapter’s announcements, press releases and marketing activities
7. Develop and distribute marketing materials, newsletter, etc.
8. Facilitate chapter communications to external sources (local newspapers, radio stations and organizations) and share information with PMI and other PMI communities
9. Keep the coherence between the marketing plan and the chapter strategic objectives
10. Drive the chapter’s advertisement process and ensure results
11. Collaborate with local businesses to publicize the chapter and PMI
12. Publicize the chapter and PMI through internal and external publications
13. Oversee the relationship with the press and the relation with the public authorities, government bodies and non-governmental organizations
14. Monitor and coordinate presentations to external stakeholders and other organizations interested in the activities of PMI
15. Increase awareness of PMI and the chapter
16. Maintain relationships with sponsors for revenue generation to fund the chapter’s activities

- 17. Coordinate and organize presentations to potential chapter sponsors, event sponsors and other sponsors
- 18. 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, Twitter)
- Newsletter Tools
- Knowledge of Fundraising Techniques

OTHER LEADERSHIP SKILLS

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

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 9
Vice President Marketing shall own all the activities related to publicity and marketing of the Chapter and its programs, working with the rest of the Board.	

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Review and update Chapter marketing materials	2x Annual
15	Publicize Chapter events	Monthly
16	Update Chapter web site	Monthly
17	Product Chapter newsletter	Monthly

18	Drive Chapter advertising program	Monthly
19	Review and/or develop sponsorship programs	2x Annual
20	Run Chapter marketing campaigns	4 Campaigns
21	Develop and review marketing plan	Monthly
22	Volunteer to Chapter Conference / National Conference	1 track
23	Volunteer to Chapter Trainings	4 days
24	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT GOVERNANCE & BRANCHES	Tenure	2 years
Type of Role	Non Executive Non Signatory	Average Monthly Volunteer Hours	20
Associated Volunteer Roles	AVP Branches, Branch Committee Members		

ROLE DESCRIPTION

Elected volunteer responsible for addressing governance and policy issues, including ensuring the maintenance and enforcement of chapter policies and bylaws, and managing operations of PMI Kerala Branches.

ROLES AND RESPONSIBILITIES

1. Ensure the policies are consistent and compliant with all applicable governmental jurisdiction and regulations (e.g., IRS, Government Compliance, PMI Policy)
2. Review and update bylaws
3. Ensure the chapter and/or bylaws are upheld and enforced
4. Develop and maintain policy manual
5. Develop a transition and succession plan
6. Ensure smooth operations of branches in consultation with Board of Directors
7. Identify and propose new branch extension opportunities to the Board of Directors
8. Develop and implement branch operations management document
9. Recruit and Manage Branch Committees
10. Oversee PMI Global Operating Center and chapter policy and identify any gaps
11. Develop and maintain information security/personal information policy
12. Ensure and oversee roles/function definitions
13. Address any breeches that may be brought up against a member and/or the chapter
14. Assist in resolving chapter conflicts
15. Raise awareness of and provide training on code of conduct/regulations/processes
16. Oversee and ensure smooth transition and transition planning
17. Be aware of the Ethics Review Process
18. Perform as region liaison for the chapter
19. Develop and implement succession and transition plan

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

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 10
Vice President Governance and Branches shall own all the activities related to the formulation of policies and processes for the Chapter and adherence of Chapter activities aligned with those and to PMI® global policies and have the accountability of running the branches within the framework of the Chapter and associated governance.	

Typical Measurable Objectives		
Item #	Measurable Objective	Metric
1	Participate in Strategic Planning Sessions	3 meetings
2	Develop Strategic Plan & Goals for Role	1 plan
3	Documented Activity Reports	12 reports
4	Meets Communication Requirements	48 hour rule
5	Meets Agreed Upon Deliverables and Deadlines	90%
6	Volunteer Utilization	1 plan
7	Network with other Chapters or Professional Assoc.'s for Best Practices	1 report
8	Strives for Innovation & Continuous Improvement	1 suggestion
9	Attendance at Board Meetings	85%
10	Attendance at Chapter Functions	85%
11	Develops Leadership Skills Through PMI Learn Courses	4 courses
12	Attends Regional Meeting	1 meeting
13	Attends Leadership Institute Meeting	1 meeting*
14	Develop Board Transition and Succession Plan	1 plan
15	Review Chapter policies and identify gaps	1 report
16	Develop and review information security and privacy policies	2 policies

17	Chapter maintains local legal compliance	2x annually
18	Reports on status of all conflicts, grievances, and issues	Monthly
19	Volunteer to Chapter Conference / National Conference	1 track
20	Volunteer to Chapter Trainings	4 days
21	Volunteer to other chapter events	4 days

Role Name	VICE PRESIDENT OUTREACH	Tenure	2 years
Type of Role	Non Executive Non Signatory	Average Monthly Volunteer Hours	20
Associated Volunteer Role	AVP Academic Outreach, AVP Social Outreach, AVP Corporate Outreach, Lead - Academic Outreach, Lead - Social Outreach, Lead - Corporate Outreach		

ROLE DESCRIPTION

Elected or appointed volunteer responsible for developing relationships within the local business community to promote adoption of project management practices, the project management profession, and the chapter. VP of outreach shall be responsible for establishing academic, corporate and social outreach activities and ensure smooth operation of all activities as per the guidance of the chapter board.

ROLES AND RESPONSIBILITIES

1. Create and Manage guidelines for Academic outreach activities for the chapter after validated by PMI and Approved by PMI Kerala BOD
2. Establish and maintain student clubs as per the established guidelines of PMI
3. Ensure all student clubs and functional and meeting yearly activities as per the charter
4. Identify and build relationships with businesses in the chapter’s local area to engage with and maintain a record of contacts.
5. Use ThoughtSpot membership data and other sources to identify potential business contacts.
6. Learn what the chapter is or is not providing to identified organizations.
7. Create the value proposition for why a business would engage with the chapter.
8. Establish internal processes to sustain business relationships.
9. Investigate usage of CRM or other tools to capture business contact information.
10. Work with other functional areas such as professional development to provide value to the business outreach members.
11. Develop an overall strategy that supports the overall strategies of the chapter and PMI.
12. Develop goals/objectives to measure success and maintain corporate outreach budget.
13. Conceive and implement innovative programs to support corporate outreach strategies.
14. Evaluate and maintain existing corporate outreach programs and partnerships or monitor activities of outreach volunteers assigned to manage the program.
15. Research and utilize PMI materials to support designated outreach activities.

16. Work with volunteer engagement to recruit and onboard any corporate outreach team members.
17. Establish relationships with professional organizations already engaged with corporations identified as potential engagement partners.
18. Represent the chapter to area corporations to develop partnerships and expand the practice of project/program/portfolio management that will add value and benefits.
19. Once the corporate partners have been identified, create and execute the agreed upon initiatives.
20. Establish and maintain relationships with appropriate groups/individuals within potential partnership corporations.
21. Provide leadership for corporate outreach events and lead the corporate outreach team in these areas.
22. Provide timely, open communications and updates on activities to leadership.
23. Contribute to a knowledge base for presentations, templates, images, etc., that can be referenced and repurposed for all Outreach programs.
24. Work with chapter leadership to promote outreach activities.
25. Explore opportunities for corporate outreach partners to make presentations at the chapter breakfast roundtable, career development network meetings, or to host outreach events and collaborate on projects that benefit the community.
26. Once a new relationship is established at an organization, introduce PMI's business development lead (bdl) when necessary.
27. Develop and implement succession and transition plans for the role.

BUSINESS ACUMEN SKILLS:

- Leadership abilities
- Influence
- Context and situational awareness
- Public speaking/presentation
- Relationship building

POWER SKILLS:

- Time management
- Productivity
- Critical thinking
- Problem solving
- Teamwork
- Emotional intelligence
- Organization

Bylaw reference section	Article V – PMI KERALA CHAPTER Board of Directors:Section 11
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Vice President Outreach shall own all the activities related to the various outreach activities of PMI Kerala chapter such as Academic, Corporate, Social etc.