

PMI Southwest Ohio Chapter
2018-19 Election Open Roles

Role	Responsibilities
VP Membership	<ul style="list-style-type: none"> • Develop and implement a Member Recruiting and Retention Plan. • Maintain a membership drive, including provision of application forms and PMI information for potential members. • Maintain the monthly Membership Report and distribute it to the Board. • Analyze monthly membership demographics and send the results to the Board. • Advise all Board members of all new members. • Ensure that PMI and Chapter membership records reconcile. • Maintain up-to-date records of the local Chapter membership • Provide other officers with frequent updates as required for their responsibilities. • Obtain names and addresses of first-time guests at Chapter meetings. Ensure an email invitation to join the chapter is sent to first-time guests. • Ensure a welcome email is sent with a certificate number for a free dinner or breakfast meeting to each new member. • Ensure an email is sent to each renewing chapter member thanking them for renewing his or her chapter membership. • Upon receipt of the updated membership directory ensure an email is sent to members whose membership will expire in 2 months reminding them to renew their PMI membership. • Ensure an email is sent to new members reminding them to keep their contact information current. • Perform other duties as requested by the President.

Role	Responsibilities
VP Outreach	<ul style="list-style-type: none"> • Establish goals for the Outreach program over a 3-5 year horizon and the supporting strategies required to attain those goals. • Coordinate activities between school programs, community connections, and Chapter meetings or other functions. • Develop an annual Outreach budget for the fiscal year for approval by the Board. Coordinate activities between school programs, community connections, and Chapter meetings or other functions. • Supervise preparation of any publications, letters of introduction, or newspaper items developed by the Directors of the Outreach programs. • Support lines of communication among Directors, the Board, community organizations, and universities. • Has the following Directors and associated goals for each programs: <ul style="list-style-type: none"> ○ Director of Academic Outreach ○ Director of Community Outreach ○ Director of Business Outreach ○ Director of PMI-EF Liaison • Coordinate the sharing of volunteers within the Outreach program • Ensure that the Directors' goals are aligned with his/hers as presented to the Board.

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Role	Responsibilities
VP Professional Development	<ul style="list-style-type: none"> • Oversees the planning and execution of all events that are designed to enhance the professional development of the chapter members. These events include: <ul style="list-style-type: none"> ○ Chapter dinner meetings ○ Chapter breakfast meetings ○ Educational workshops ○ Annual Summit or other Professional Development Day events • Responsible for ensuring the curriculum delivered in the calendar of events is closely aligned with the skills and knowledge described in the PMBOK. • The programs should also offer the members the opportunity to attend events and programs that offer opportunity for continued development for all levels of Project Managers. • The following Directors report to the VP of Professional Development: <ul style="list-style-type: none"> ○ Director of Monthly Events - organizes and oversees chapter dinner and breakfast meetings. ○ Director of Professional Development/Seminars - organizes and oversees educational sessions including workshops and seminars. ○ Director of Mentoring – oversees the launch of a new mentoring program

Role	Responsibilities
VP Finance	<ul style="list-style-type: none"> • Develop an annual operating budget for the fiscal year for approval by the Board. • Prepare financial reports on the activities and financial status of the Chapter. • Prepare and maintain financial records of all Chapter moneys received from dues, dinner meeting payments, etc., and pay all bills. Promptly deposit all funds received. • Manage all financial arrangements for meetings and special events, including where required: the registration desk, collection of fees, and payment to the meeting place. • All Contracts must be reviewed by the Board of Directors and signed by two board members; one signature for approval must be the VP Finance. • Prepare all tax and financial reports for the Chapter as required by PMI and by local, state, and federal governments. • File Form 990 or Form 990-EZ, as appropriate, each year with the Internal Revenue Service (IRS). • Coordinate the independent financial audit with the President and the appointed auditor. • Provide Form 1099-Misc. as required. • Establish and monitor Chapter compliance with the IRS tax code and “Tax Exempt Certificate” use. • Prepare the Chapter Annual Report for submission to PMI Headquarters. • Prepare submissions for PMI awards.

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	<ul style="list-style-type: none"> • Support a complete and timely turnover of Chapter records to the position’s successor. • File the Annual Report with the Ohio Department of Taxation if required by the Articles of Incorporation. • File with the State of Ohio for “Continued Existence” as required (every five years – prior renewal was 5/2014; next due 5/2019). • Maintain records such that they are available for inspection for a period of not less than seven years. • Submit the Chapter’s insurance coverage payment to PMI Headquarters in a timely manner. <ul style="list-style-type: none"> ○ Ensure continued coverage under the liability insurance policy provisioned by PMI. • Perform other duties as requested by the President.
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Role	Responsibilities
President Elect	<ul style="list-style-type: none"> • This position is a pre-requisite to the Chapter President and is a year term • The primary functions are to assist the President with operations and planning and represent the chapter in the absence of or at the request of the President. • Additional responsibilities of the President-Elect include: <ul style="list-style-type: none"> ○ Annual review of Operations Manual ○ Plan and facilitate Annual Board of Directors Strategic planning meetings – at least once per year ○ Summarize and distribute the strategic plan ○ Provide Strategic overview/update at the annual Full Chapter meeting ○ Ensure Full Chapter meeting is scheduled 1-2 times per year ○ Coordinate with the Executive Director of Strategic Alignment and Strategic Administrator to ensure the management of strategic initiatives, including defining metrics and tracking progress against the KPIs ○ Support the President in any afore listed responsibilities ○ Liaison to the PMI Chapter Development Department