Project Management Institute (PMI)

Southern Ontario Chapter (SOC)

Volunteer Orientation Manual

Release v1.5

Compiled by: Volunteer Handbook Project Team 2006

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1. Introduction

Thank you for choosing to be a volunteer for PMI-SOC. We are pleased to welcome you in behalf of the PMI-SOC Board of Directors, and hope that your volunteering experience will be both enjoyable and personally rewarding. This handbook is to familiarize you with all the information needed for you to start off with your volunteer endeavors with the chapter.

2. PMI-SOC Value Proposition

PMI SOC is a volunteer driven organization in the business of promoting the adoption, advancement, and success of project management in organizations. We are a focal point for transferring PM knowledge to our members and to anyone else interested in the practice of PM.

3. PMI-SOC Vision

"We are the voice and advocate of standards and best practices for project management in the Southern Ontario region through effective communications and promotion of project management."

Our current strategy to realize this vision can be summarized as follows:

Effective Communications

- Better communications of the benefits and value of being a PMI member to current SOC members and potential members
- Creating networking opportunities for PMI-SOC members to effectively communicate among themselves

Promotion of Project Management

- Supporting other chapters, SIGs in the area and by being involved in the Project Management Conferences / Symposiums

4. PMI-SOC Volunteer Management Vision

- Volunteers will have a rewarding experience that will be both beneficial to the chapter and satisfying for themselves
- PMI-SOC's mission and value proposition will be better accomplished with the effective use of its volunteer resources
- Volunteers will be recognized for their contributions to the chapter in a timely and orderly fashion.

5. PMI-SOC Organization Chart
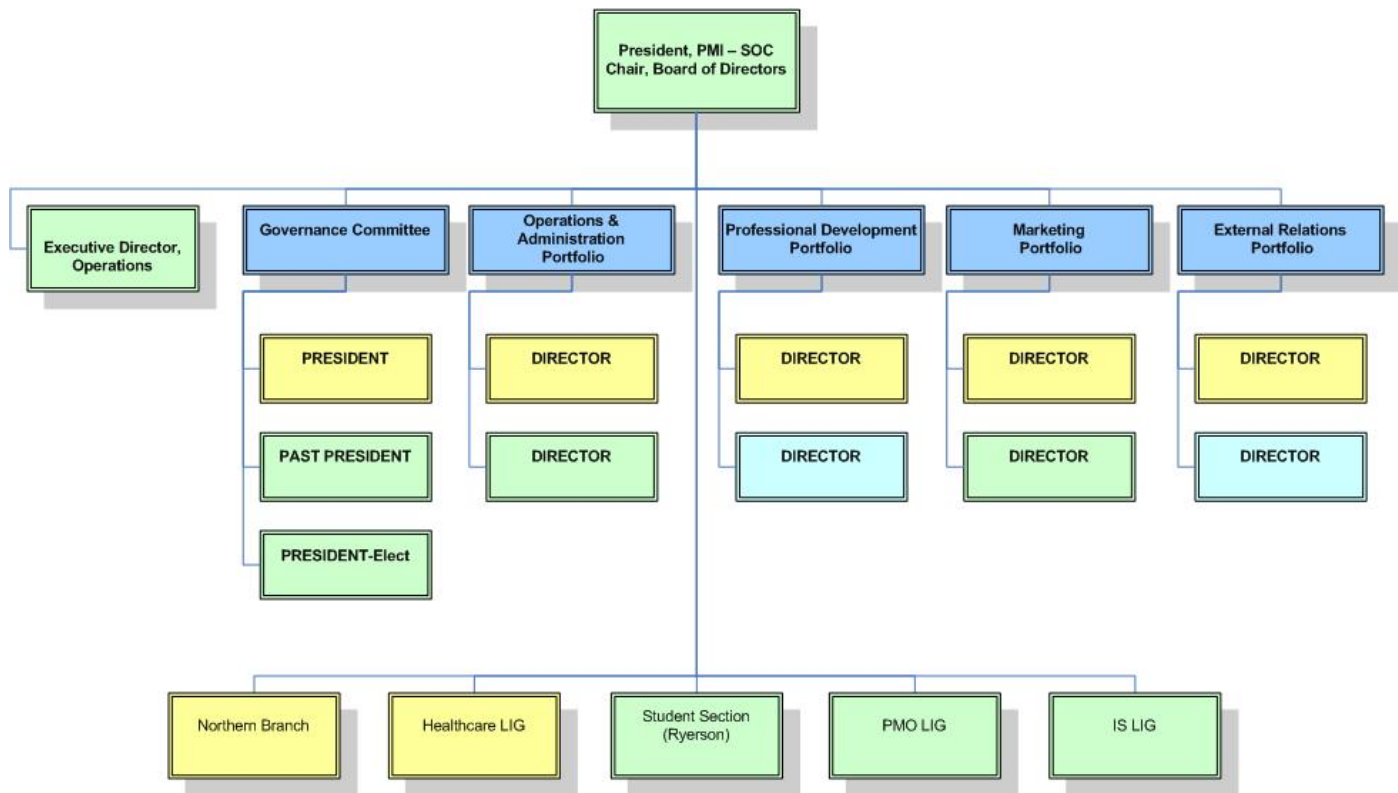
Board of Directors - PMI-SOC is a volunteer driven organization that is managed by a Board of Directors. This includes the President, President-Elect, Past President and other Directors elected by members or appointed by special resolution of the Board of Directors to fill up a vacancy. The Directors are then assigned to various committees to effectively run the chapters' business and intiatives.

- **President** – The President shall be the Chief Executive Officer of the PMI-SOC and shall be charged with the general supervision of the business and affairs of the PMI-SOC.
- **President-Elect** – The President-Elect shall perform duties and exercise such powers as the President in his absence or inability to perform. The President-Elect shall also be responsible for maintaining and safeguarding books, paper, records, docs and other instruments belonging to the PMI-SOC.
- **Past President** – The past president provides advice and support to the Board based on his experience with PMI and the chapter. The Past President assumes the Chair of the Nominating Committee and other duties as determined by the President or the Board

Governance Committee - The Governance Committee is made up of the President, President-Elect and Past President and is responsible for setting the agenda for chapter and ensures that it is operating effectively. From time to time, the Board will take on additional projects such as Project World, Leadership Summit Sessions, Senior PM Conference workshops and this committee works in line with the chapters Board of Directors.

Operations Committee – The Operations Committee, a sub-committee of the SOC Board of Directors, is responsible for the ongoing operational activities and functions of the Chapter. It is chaired and co- chaired by two members from the Board of Directors and has three officers namely:

- **VP for Volunteer Management** - Provide strategic direction by managing and directing the PMI-SOC Volunteer Management portfolio, which includes volunteer recruitment, placement, orientation, recognition, development, reporting and evaluation.

- **VP for Communications** - Lead the development and implementation of a Communications Plan and Communication Standards & Processes for PMI-SOC committees, members and parties interested in interacting with PMI-SOC. Coordinate improvements and ensuring consistency across current communication channels such as Web site, Newsletter, e-mail blasts, etc.

- **VP Finance –** Responsible for all financial matters in the PMI Southern Ontario Chapter and any associated groups, including the IS Local Interest Group and Student Section (currently Ryerson). This includes the standard fiscal management of the finances for the chapter ranging from budgetary considerations to audits; monthly to annual reporting; payments to revenue collection and generally the accountability of the chapter's fiscal books.

Professional Development Committee – The Professional Development Committee, a sub committee of the PMI SOC Board of Directors and is responsible for all the Professional Development aspects of Project Management and also to help and mentor the new and budding project managers. One member from Board of Directors and officer chairs it.

- **VP Professional Development** -Provide and facilitate the professional development activities relating to PMI – PMP exam preparations, conduct and evaluate the training sessions relating project management as a profession and also provide the mentoring sessions to the new and budding project managers to enhance their skills.

External Relations Committee – The External Committee, a sub committee of the PMI SOC Board of Directors and is responsible for all the relations with other organizations, such as Registered Education Providers (REPs), Local Interest Groups (LIGs), other PMI Components, etc.
Two Board of Directors chair and co-chair this committee.

Marketing Committee – The Marketing Committee, a sub committee of the Board of Directors, which is responsible for promoting and enhancing the chapter's value proposition. The Marketing Committee looks after the PMI-SOC brand and ensures consistency and clarity of external communications. Two Board of Directors chair and co-chair this committee and has two officers namely:

- **VP Products** - Provide strategic direction for and oversee all projects related to develop Offerings that increase the chapter's value proposition.

- **VP Marketing Communications** - Provide direction for and oversee all projects related to promoting the chapter to the project management marketplace.

6. The PMI-SOC Volunteer

6.1 Core Values

At PMI-SOC we recognize volunteers are our vital partners in success. To facilitate a mutually rewarding experience, we recommend you familiarize yourself with its core values outlined below:

- **Commitment**
  Volunteers are vital members of the PMI-SOC organization. All volunteers are expected to honor their commitment to attend the activities that they sign up to support, perform the job assigned, and work the hours that they agreed to work. It is also expected that volunteers will afford the same quality of work that they do on their regular paid jobs.

- **Integrity**
  Volunteers may be asked to serve in a number of capacities in which they interact with third-party vendors or other chapters. Volunteers are expected to conduct work on behalf of PMI-SOC with the highest standard of honesty, integrity, and fairness; therefore, avoid conflicts of interest, both real or perceived, avoid appearance of misconduct or improper behavior that jeopardize the reputation of the PMI-SOC Chapter or other PMI Chapter affiliation.

- **Diversity**
  As volunteers, you will interact with a diverse population representing members, vendors, and other chapter affiliations. It is expected that you will afford everyone with the same respect and dignity.

6.2 Protocol

As a volunteer at PMI-SOC it is expected you have agreed to provide voluntary work in some capacity in accordance with a chapter operational or job description or project, and hence agree to follow all relevant chapter protocols. We recommend you familiarize yourself with protocol guidelines as outlined below:

- Be members of PMI and PMI-SOC although PMI membership is not required to be a volunteer team member

- Agree to adhere to the terms of the PMI-SOC Confidentiality Agreement. Its mandatory all volunteers sign the confidentiality agreement (see Appendix 1)

- Contribute without expectation of financial or other form of remuneration from PMI or the PMI-SOC

- As a member of a project team, its expected the assigned tasks are accorded required priority and deliverables completed within agreed timescales .In case you are unable to commit to an initiative, we recommend you review it with the project sponsor and advise your availability.

- Report actual hours and duration of the assignments on regular basis .We recommend you familiarize yourself with the time reporting system-TimeTiger (see Appendix II) as this is used to generate overall project status report.

7.0 Volunteer Awards and Recognition

7.1 PDU Certificate for PMP Volunteers

At the beginning of the calendar year, PMI-SOC Board of Directors will issue a certificate for all PMP certified volunteers based on hours entered in TimeTiger from the previous calendar year. PMPs are responsible for reporting their volunteering activities as category 5.

Please refer to the PMI CCR handbook for the details of PDU calculations

7.2 Recognition Awards

PMI-SOC values its outstanding volunteers by giving them Recognition Awards for their outstanding contribution to the chapter activities (like Service and Delivery of Projects or activities by adhering to the commitment mutually agreed upon).

8.0 Chapter Office and other Resources

8.1 PMI-SOC Chapter Office

The Chapter Office provides the administrative support to the chapter members, Board of Directors and chapter volunteers.

The contact information for the Chapter Office is:
1370 Don Mills Road
Suite 300
Toronto, Ontario M3B 3N7
Tel: +1 416-381-4058
Fax: +1 416-441-0591
e-mail: info@soc.pmi.on.ca

Chapter Office Administration Support includes:

- Registration and Payment processing for Professional Development offerings, Meetings
- New member packages, PMI material
- Newsletter co-ordination
- Respond to phone and e-mail inquiries
- Board meeting minutes
- Election support
- Book meeting rooms and conference calls
- Order food for meetings
- Web site support / updates Office space
- Meeting Rooms
- Telephone package, including Fax
- Bookkeeping
- Admin support for 40 hours / week

8.2 Use of Chapter Office facilities and Conference calls (for PMs, Team Leads or Officers)

8.2.1 Boardroom / Meeting Rooms

You can either call PMI-SOC office reception at 416-381-4058 or email info@soc.pmi.on.ca. When you book a room and require food, please be sure to let the Chapter Office know which committee this is for – so that any charges can be allocated appropriately. To arrange this, please notify the Chapter Office at least one day notice to arrange this, including number of attendees, and any other requirements! Please note, that after 6PM, the doors on the ground floor are locked. There is a buzzer on the side that will notify the people in the meeting room on the 3rd floor.

8.2.2 Conference Calls

Conference calls are handled through Chapter Office who can be reached through info@soc.pmi.on.ca or 416-381-4058. If you need a committee conference call, please be sure to reserve the date/time – we only have one line and it would be best to avoid overlap!! The same rule applies when you are booking a conference call. Please let the Chapter Office know which committee the call is intended for so that it can be allocated to the right project code. Once the call is confirmed, the Chapter Office will send you the information you need – i.e. dial in number, passwords, etc.

8.3 Collaboration Tools

Yahoo! GROUPS are the current standard used by PMI-SOC committees and project groups for collaboration tools such as mailing lists, file sharing and event calendar. All volunteers of PMI-SOC will have access to the Yahoo group document repository for their respective projects. Their respective Yahoo group moderator or PM will approve access to Yahoo groups. All project documents must be uploaded to the Yahoo group repository.

8.4 General Expense Policies

It is the general policy of the Board to ensure that no member will be "out of pocket" for any expense that they incurred on behalf of the Chapter and at the request of the Chapter Executive.

For an index of policies related to volunteer projects and travel, please go to Appendix IV. For more details about finance policies and procedures, please email info@soc.pmi.on.ca for a copy of the PMI-SOC Finance Handbook.

9.0 Volunteer Feedback

We encourage feedback from our volunteer members and any queries with regard to volunteer initiatives. Please feel free to contact any officer of the PMI SOC organization for further clarification and support. The updated contact information can be accessed at our corporate web site at http://soc.pmi.on.ca, under the Leadership page.

APPENDIX I

PMI-SOC VOLUNTEER CONFIDENTIALITY AGREEMENT

In connection with the performance of services requested by PMI_SOC and in reliance on Your statement that You are interested in pursuing that business relationship, the Parties may provide each other with business, financial, legal, technical and other types of information and/or ideas, in written, electronic and oral form, which are related to the business of the Parties. All such information is hereinafter referred to as "Proprietary Information." "You" for purposes of this Agreement means the company or individual set forth below, its agents, attorneys, affiliates, subsidiaries and all persons acting on its behalf. "The Parties" for the purposes of this Agreement shall mean You and PMI_SOC.

In consideration for the disclosure and any negotiation concerning the proposed business relationship, the Parties agree as follows:

1. The Parties will hold in confidence and not possess or use (except to perform the requested services) or disclose any Proprietary Information except information a party can document (a) is in the public domain through no fault of the disclosing party, (b) was properly known by the disclosing party, without restriction, prior to any disclosure, or (c) as may be required by law. The foregoing does not grant either party a license in or to any of the Proprietary Information of the other party.

2. If the business relationship between You and PMI-SOC expires or is terminated, the parties will promptly return all Proprietary Information and all copies, extracts and other objects or items in which it may be contained or embodied.

3. The parties will promptly notify the PMI-SOC Privacy Officer of any unauthorized release of Proprietary Information.

4. The parties acknowledge and agree that due to the unique nature of the Proprietary Information, any breach of this Agreement would cause irreparable harm for which damages are not an adequate remedy and that the Parties shall therefore be entitled to equitable relief in addition to all other remedies available at law.

5. The terms of this Agreement will remain in effect with respect to any particular Proprietary Information until either party can document that it falls into one of the exceptions stated in Paragraph 1 above.

6. This Agreement is governed by the laws of the Canadian Federal Privacy Legislation (PIPEDA) and may be enforced in any provincial or federal court sitting in that province. Nothing in this Agreement may be modified or waived unless in writing, signed by a duly authorized representative of the Parties

Intending to be legally bound and duly authorized to enter into this Agreement on behalf of the individual or company set forth below, this Agreement is:

ACKNOWLEDGED AND AGREED TO THIS _____ DAY OF <insert MMMYYYY>

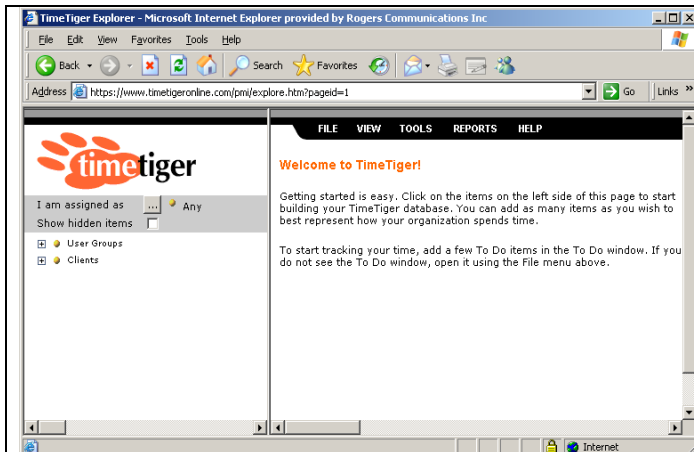<Insert Volunteer's Name Here>

BY: ___*(signature of the volunteer)*_____

Project Management Institute Southern Ontario Chapter (PMI_SOC):

BY: ___**(signature of an elected Board member)**_____

APPENDIX II

Time Entry using TimeTiger

## 1. Logging on to TimeTiger

TimeTiger Fig. 1

- You can access TimeTiger login page from the PMI-SOC volunteers web page or by typing https://www.timetigeronline.com/pmi/login.htm in your internet browser

- The login screen will be displayed

- From the **User:** dialog box, enter you user name (firstname.lastname)

- From the **Password:** dialog box, type in your password (default is your first name)

- Clear the check box on **Open To Do window** (you can open it later)

- Press the **Login** button and you will access to the main TimeTiger page

2. Log your time
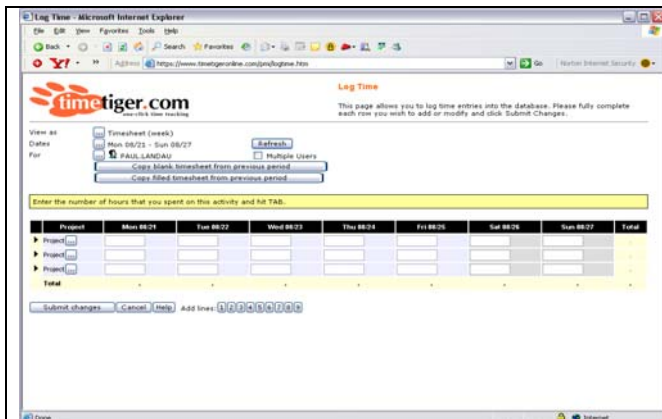
TimeTiger Fig. 2

- Select File /Log Time from the menu
- From the View as button, select Timesheet (week)
- For each project that you want to log time into, press the project button at the left side of each row and select the project from the hierarchical list (press the + sign to expand the branch)
- Enter your time day by day (you can left empty some days if necessary)
- Press Submit changes and wait for the screen to refresh (will show totals at the right end). Warning! If you press changes twice, you will duplicate your logged time for the selected period.
- If you need to log time for another period, press the Dates button and choose the desired period.
- Once you have finished logging your time, press Cancel to go back to the main screen. Warning! If you press Cancel before submitting your changes, you will lose your last entry

3. Reviewing your time log (Timesheet report)
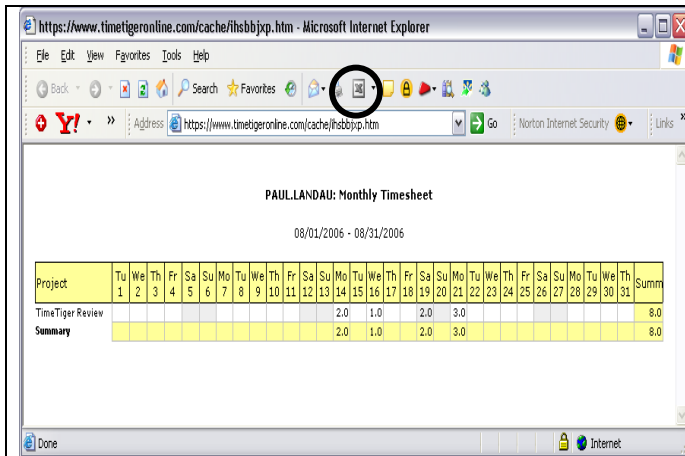
TimeTiger Fig. 3

- From the reports menu, choose Time Sheet, Select Weekly or Monthly.

- Select the starting date

- Select yourself from the user list (User Groups – Volunteers – yourself)

- Select a breakdown (e.g. project)

- Run the report

- The report opens in a new Windows (pop-ups should be enabled). Once you finished with it, close the window. You can also export it (as any other report) to MS Excel or Word by using the corresponding button of the Explorer toolbar
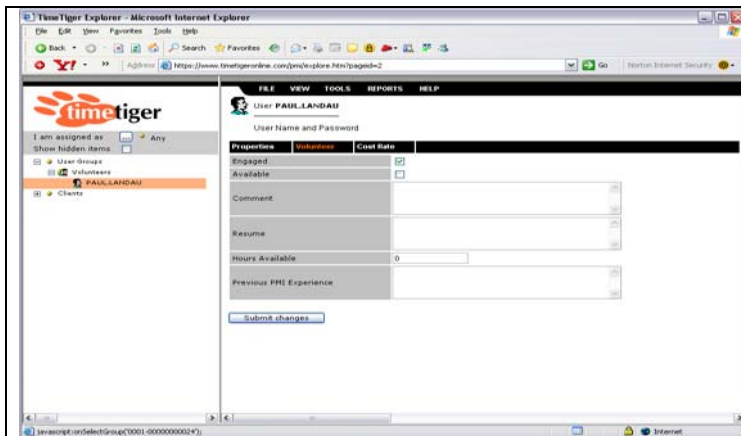
4. Changing your personal information
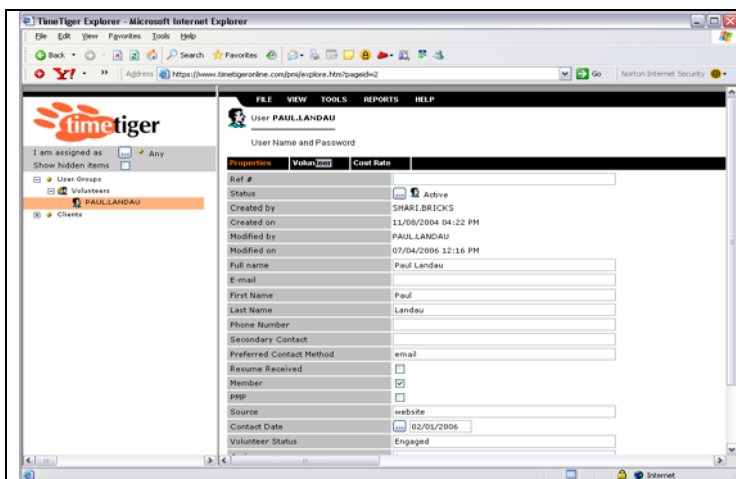
TimeTiger Fig. 4

- From the left Panel choose User Groups – Volunteers – Your name

- From the View Menu choose Properties

- Enter your personal information in the Properties tab

…changing your personal information (cont'd)

TimeTiger Fig. 5

- From the Volunteer Tab, enter your resume (type it or copy and paste it), previous experience and time available

- If you need to modify any information, type it over. For your resume, copy and paste a new one.

- Once you are done, press the Submit button

5. Changing your password
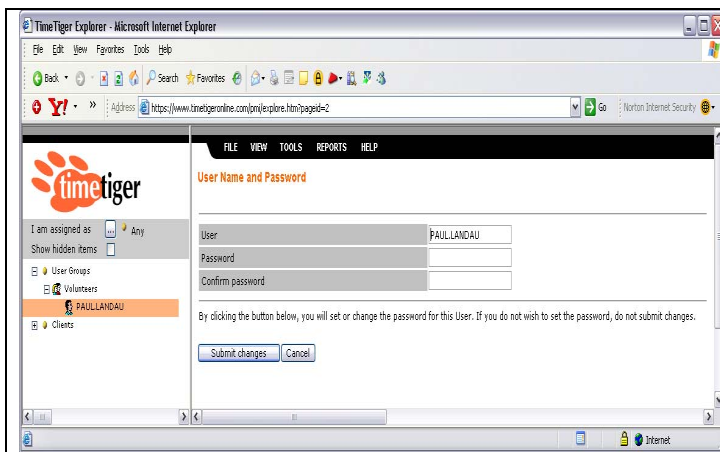
TimeTiger Fig. 6

- From the left Panel choose User Groups – Volunteers – Your name

- From the View Menu choose Properties

- The Properties window appears

- Click on the line under your name that says "User Name and Password"

- A new window opens. You can change your password now.

- Press Submit to register your changes.

APPENDIX III

PMI Speak and Acronyms

Components.....PMI Chapters, PMI SIGs, PMI Colleges
Chapter…...……Geography based PMI component
Colleges…...……PMI Knowledge Area Application
Region………....Collection of chapters (SOC is Region 3)

BoD...................PMI or Chapter Board of Directors; elected to govern the Institute or chapter
CAPM™ ....Certified Associate in Project Management; project management practitioner credential
offered by PMI
CCR…………PMI Continuing Certification Requirements; formerly the Professional Development
Program; used to describe the PMP certification maintenance process
CM………….Component Mentor (Region 3 – Judi Vincent)
EVM…………Earned Value Management
ISO...................International Organization for Standardization

LIG …………..Local Interest Group
OPM3™...........Organizational Project Management Maturity Model
PDU..................Professional Development Unit; measuring unit used to quantify approved learning and
Professional service activities toward maintenance of PMP certification requirements
(One hour study = 1 PDU)
PMBOK®……The Project Management Body of Knowledge (often incorrectly used as an abbreviation
for the *PMBOK® Guide*)
PMI...................Project Management Institute
PMI GOC........PMI General Operations Center (Newtown Square, Pennsylvania USA)
PMIEF………....Project Management Institute Educational Foundation
PMO………....Program or Project Management Office
PMP® ....Project Management Professional certification
REP..................Registered Education Provider; training provider registered under PMI's Registered
Education Provider Program
RFP..................Request for Proposal
SIG.................. PMI Specific Interest Group; interest or industry based group of PMI members without
geographical boundaries
SME.................Subject Matter Expert

VP.....................Vice President

Appendix IV

Index of Related Expense Policies

POLICY 6: If the expenditure is in the form of a Contractual commitment, only the President or Senior Vice President may sign the Contract, regardless of the amount involved. And this signature and commitment can only be provided with the approval of the Board.

POLICY 7: Accounts Payable by PMI SOC will be by Cheque only – members, officers or Directors will be reimbursed for any cash purchases or expenses by Cheque only.

POLICY 8: All fees MUST have one of two statements included, namely: "Price plus GST" or "Price including GST".

POLICY 15: Travel expenses, including transportation and accommodation incurred on behalf of the PMI Southern Ontario Chapter for chapter business, that is pre-approved, will be reimbursed.

POLICY 16: Air Travel will be subject to advanced booking for economy class, unless otherwise authorized

POLICY 17: When transportation is by private automobile, mileage may be claimed in the amount of $0.37 per kilometer, but such charges for travel between substantially distant cities may not exceed the cost of transportation by bus or by train.

POLICY 18: Travel expenses in general related to toll-roads (for example Hwy 407) are not reimbursable.

POLICY 19: Charges for the Hotel room, including taxes only will be reimbursable.

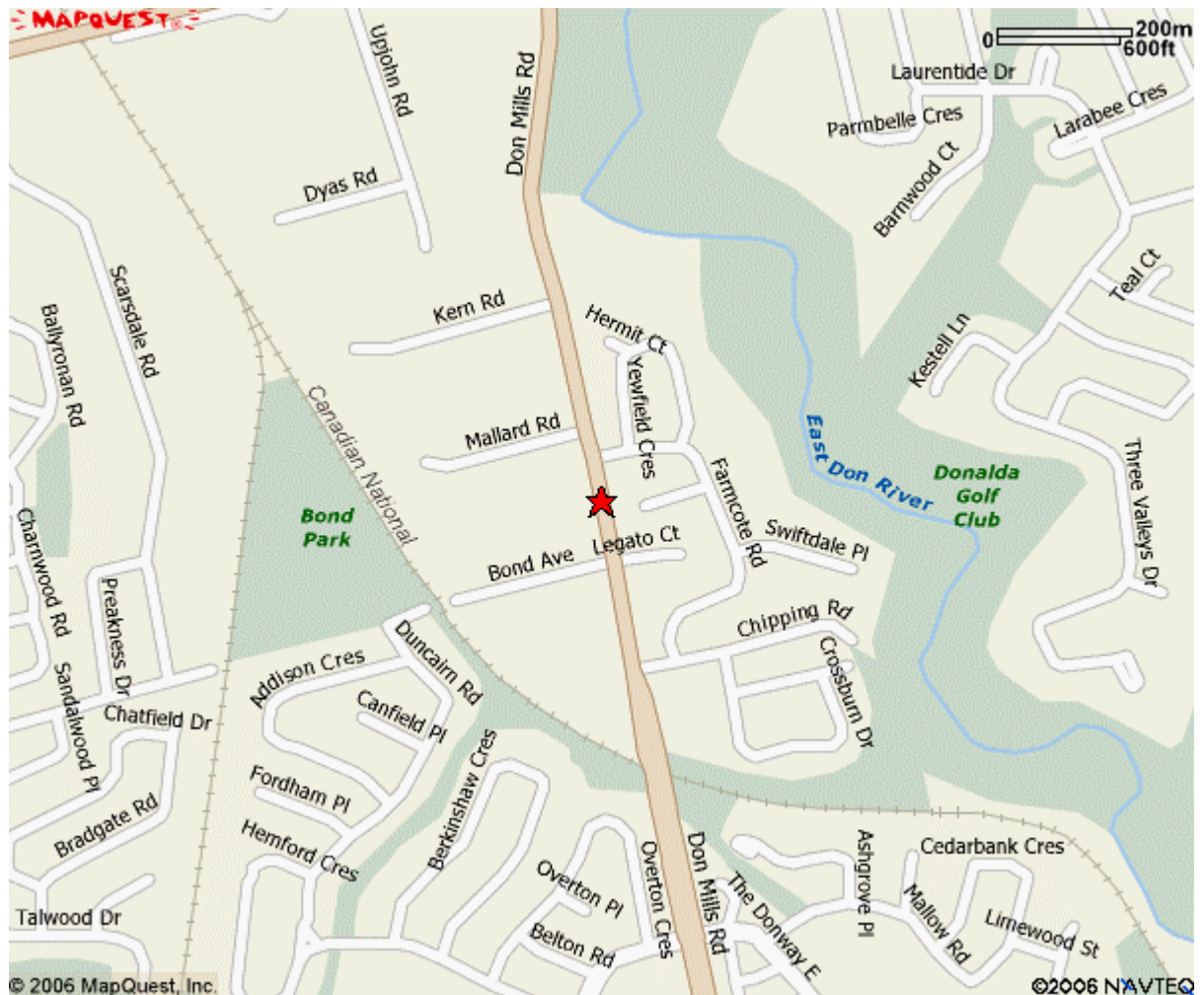**POLICY 20:** Pre-approved Telephone expenses related to Chapter business will be reimbursed at cost.

POLICY 21: Reimbursement for food is based on actual cost with receipts, a per diem is not provided for travelers.

POLICY 22: If the expense exceeds the spending limits or has not been pre-approved the expense may not be reimbursed without approval of the Board.

NOTE: *For a more detailed explanation of all finance policies and procedures, please ask the PMI-SOC office for a copy of the chapter's Finance Handbook.*

Appendix V

Chapter Office Map

1370 Don Mills Road
Suite 300
Toronto, Ontario M3B 3N7
Tel: +1 416-381-4058
Fax: +1 416-441-0591