



Project Management Institute - Washington DC
Promoting Excellence in Project Management



Volunteer Onboarding Orientation

April 21, 2015



PMIWDC – Washington, DC

- Was formed to serve the networking and education needs of Metro DC area
- Is the largest PMI chapter in the world
- Has close to 11,000 PMIWDC chapter members
- Includes 200+ volunteers who support PMIWDC Organizational Areas (OA)

PMIWDC 2015 OAs



- **Educational Partnerships**
- **Finance**
- **Local Communities**
- **Marketing**
- **Membership**
- **Networking**
- **Operations Services**
- **Professional Alliances**
- **Professional Development**
- **Programs**
- **Technology**
- **Volunteer Coordination**

Volunteer Management Goals



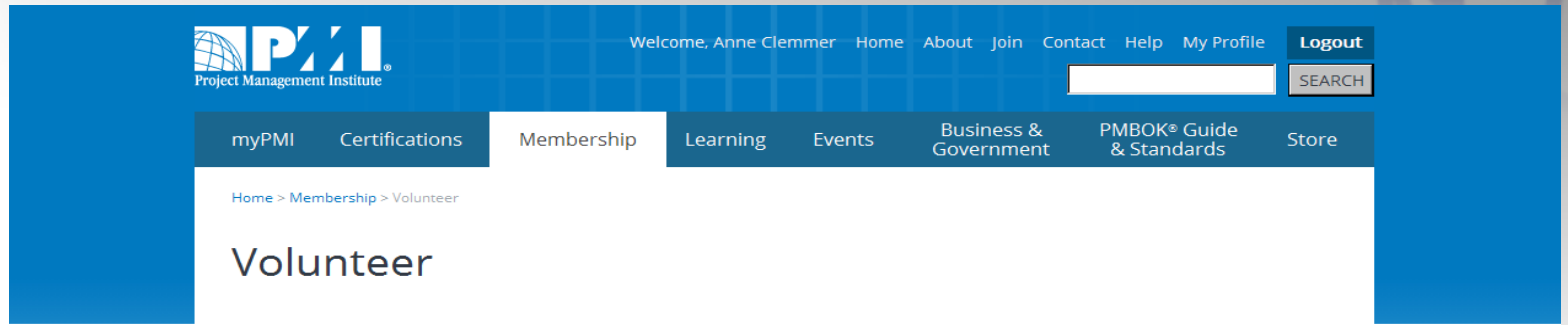
- Focus on Volunteer Management
- Centralize Best Practices for PMIWDC Volunteer Onboarding
- Operational Excellence in Recruiting Volunteers
- Provide additional guidance for Organizational Areas Processes
- Retain and Recognize our Chapter Volunteers

Centralize Best Practices

What's New?

- Volunteer Relationship Mgmt System (VRMS)
- Volunteer Onboarding Process
- Volunteer Onboarding Checklist
- Volunteers Handbook
- Monitoring and Controls

VRMS



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SEARCH

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Home > Membership > Volunteer

Volunteer

How to Volunteer

Our Volunteer Relationship Management System (VRMS) makes it easy to search for volunteer opportunities throughout the world.


To get started, log in or register and visit the VRMS to find volunteer opportunities that interest you.

Volunteer Relationship Management System (VRMS)

[VRMS Guide »](#)

[VRMS Coordinator Guide »](#)

VRMS (cont.)


Welcome, Anne Clemmer | [VRMS Guides](#) | [Coordinator View](#) | [PMI.org](#) | [VRMS Feedback](#) | [Log Out](#)

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Volunteer
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Find an Opportunity
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Find an Opportunity

Where would you like to volunteer ?

Opportunity Search Tips:

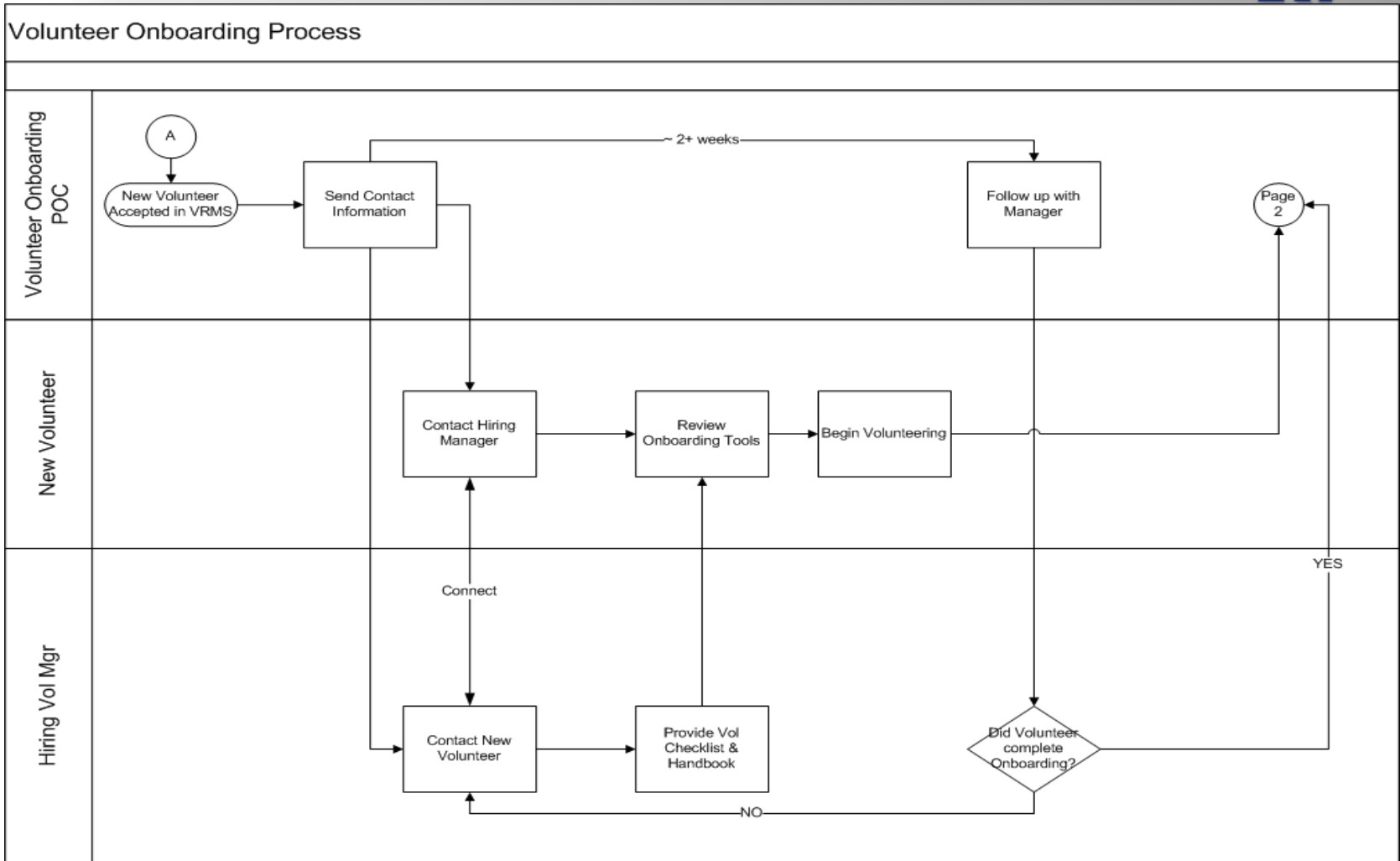
- Use the term or phrase search option to search for a term or a phrase in an opportunity name, description, deliverables or duties.
- Use ? to perform a single-character wildcard search.
- Use * to perform a multiple-character wildcard search. You can use * before or after a search term. You cannot use * term *.

Communities:

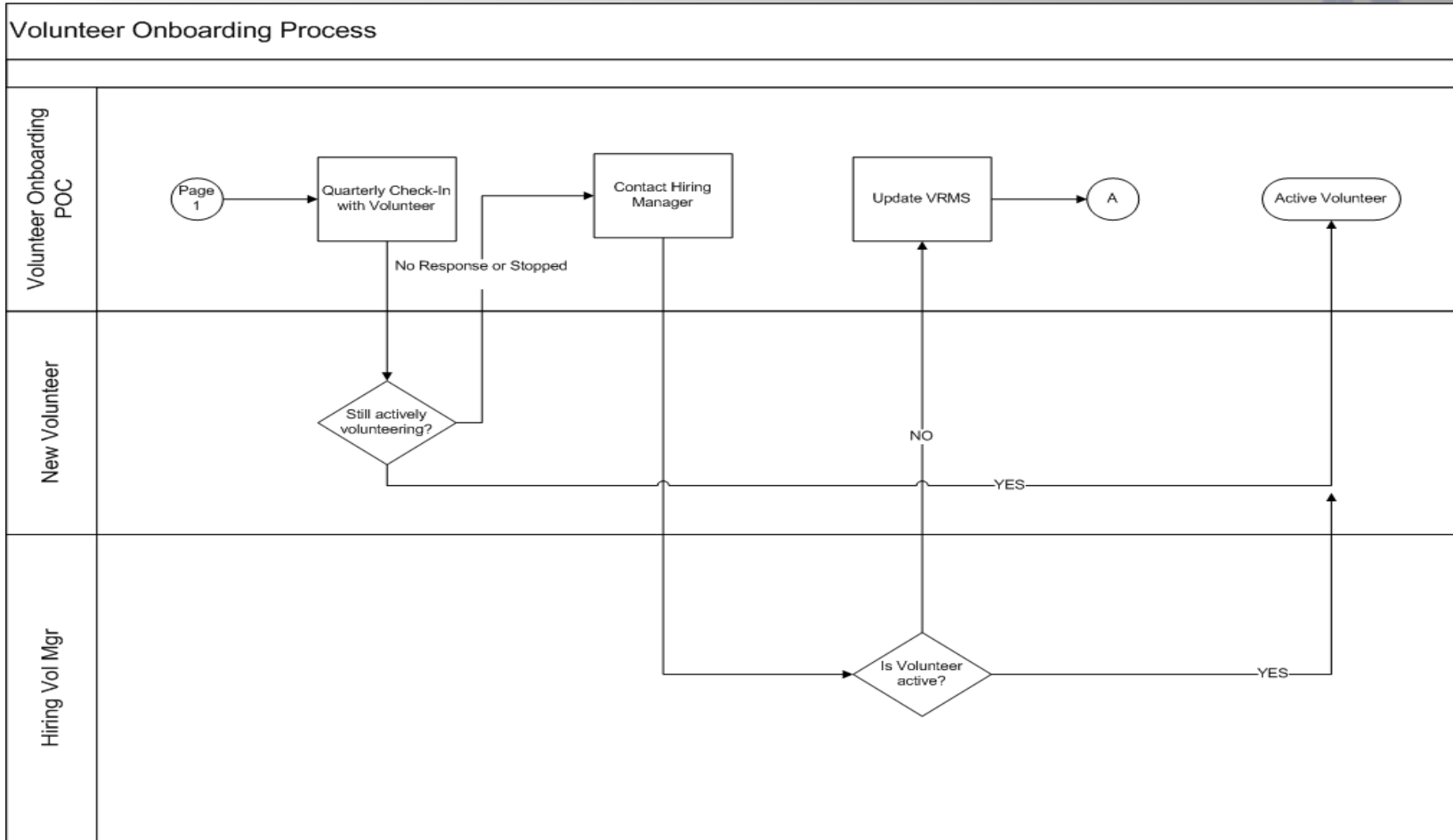
Name	Location	Interaction Type	Community Name	Community Type	Application Deadline	ID#
Programs Committee - Sign Language Interpreter	DC, United States	In-Person	Washington, DC Chapter	Chapter	2014-12-19	4257
<p>PMIWDC is looking for volunteers qualified to act as interpreters for American Sign Language during the educational components our events. From time to time members request ASL interpreters so that they can participate in our educational programs. PMIWDC is happy to provide these services at it...</p>						
Book Club Moderator (12 Rotating Positions)	VA, United States	In-Person and Virtual	Washington, DC Chapter	Chapter	2015-06-15	4261
<p>PLEASE NOTE THAT WE WILL CONTINUE TAKING APPLICATIONS UNTIL ALL 12 POSITIONS ARE FILLED. If you like to read and interact with others in the project/program management field, please join us as a volunteer coordinator/moderator for our monthly PMIWDC Reston Book Club! Twelve positions will be ...</p>						
Retention Committee Member - Membership	VA, United States	In-Person and Virtual	Washington, DC Chapter	Chapter	2014-12-09	4305
<p>PMIWDC is looking for a volunteer with a passion for improving retention among our talent i.e. members. As a Membership Retention Committee volunteer, you will first learn about the 3 pillars of retention. You will then apply those pillars in task assignments.</p>						

First < 1 2 3 4 5 > Last

Volunteer Onboard Process



Volunteer Onboard Process



Vol Onboarding Checklist



PMI Volunteer Transition / Onboarding Tips, Tools, and Resources									
	PMI Onboarding Checklist	Access Link	Chair	Vice Chair	Board Member	Admin	Webmaster	Leadership VPs	New Volunteer
1	Verify that Volunteer is an active member of PMI and PMWDC			I				R, A	C
2	Assign primary mentor/team lead if needed.		R		C				
3	Shadow Associated Team Lead during transitioning period, eg: (Attend meetings with mentor, planning sessions)		A	A	A			A	R
4	Request login to email, business cards, badge as applicable, to <TBD> **Volunteer must provide how they want their name to be presented on business card (email to: admin@pmiwdc.org)	http://webmail.pmiwdc.org/				A			R
5	Determine SharePoint Access Rights - Read/Write or Read Only & inform volunteer	VP link: password:	R					R	
6	Request login to SharePoint (email to webmaster @pmiwdc.org)						I		R
7	Setup Login to SharePoint and inform the volunteer					A	R		I
8	Provide link to key documents and share point site, leadership guide, Strategic initiatives, current meeting minutes, standard templates, trip reimbursement, documents relating to the area volunteer will be working				I, C	R			I
9	For Leadership - Be familiar with Officers Manual	http://pmilatboard.org/board/default.aspx	A		C			R	R
10	Direct volunteer to Template for pre-approval request for higher dollar expenditures (email: finance@pmiwdc.org)		R			A		R	I
11	Direct volunteer to standard templates including trip reimbursement, trip template. (email: finance@pmiwdc.org?, bookkeeper@pmiwdc.org?)							R (Finance)	I
12	Become familiar with PMI website content	http://pmiwdc.org/							R
13	Become familiar with PMI Region 5 Website								R
14	Add volunteer to the respective email group as appropriate					I	R		I
15	Read recommended documentation as recommended by leadership		A	A				A	R
16	If transitioning to a new role with or without a team lead look up all the documentation regarding that area		A	A				A	R
17	Provide samples of Marketing brochure							R	I
18	If board member or VP provide other accesses / promo codes as required					R			I
19	Provide contact list for leadership team					R			I
20	Introduce to membership at meeting, and introduce to other volunteers		R	C				R	
21	Obtain and review action plan from Leadership		A	A	A			A	R

Volunteer Handbook

- **Recruiting**
- **Interviewing**
- **Placement**
- **Records Maintenance in VRMS**
- **Conflict of Interest and Confidentiality**
- **Rights and Responsibilities**
- **Recognition**

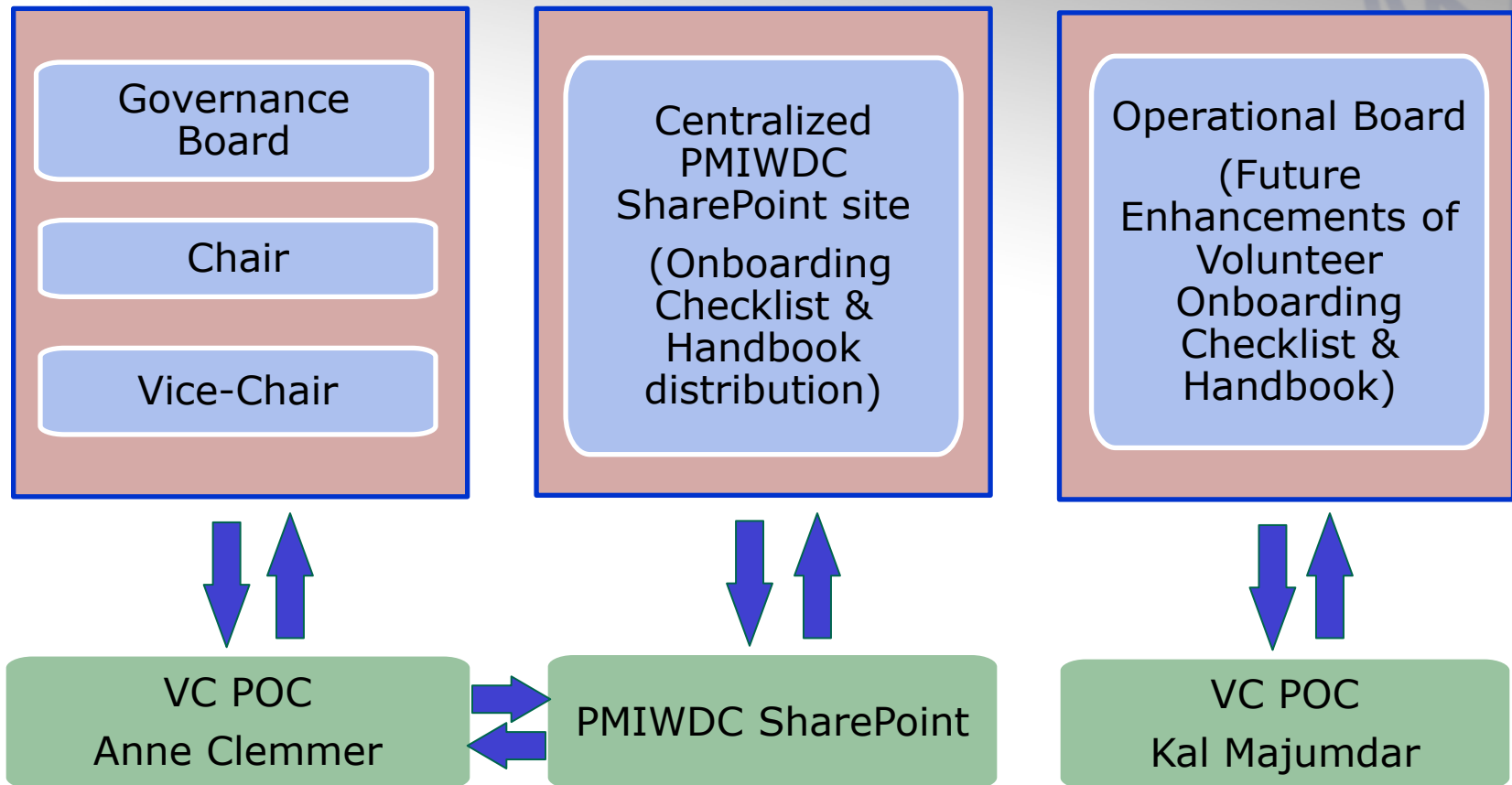
Monitoring & Controlling

- Annual Review with Operations Board
 - Volunteer Handbook
 - Volunteer Checklist

- Quarterly Check-In with Volunteers on Active Status



Volunteer Onboarding Contacts



Next Steps

- **Confirm centralized SharePoint location for Volunteer Checklist and Handbook**
- **Direct Volunteers to VRMS for PMIWDC Volunteer Opportunities**

Volunteer Contacts

- **Volunteer Management VP: Kal Majumdar –**
kal.majumdar@pmiwdc.org
- **Volunteer Appreciation & Recognition AVP: Sarah Harrington**
– sarah.harrington@pmiwdc.org
- **Volunteer Recruiting AVP: Priyank Shah –**
priyank.shah@pmiwdc.org
- **Volunteer Development & Retention AVP: Anne Clemmer –**
anne.clemmer@pmiwdc.org



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Q & A