



PMI-MONTRÉAL INC.  
**VOLUNTEER  
GUIDE**



**Drafted by the  
Volunteer Committee**  
under the leadership of the Human  
Resources Committee,  
PMI-Montreal 2015

PMI-Montréal would like to thank **Ms. Chantal Piette**,  
**Mr. Matthew Adam Tetley** and **Mr. Marius Micle** for  
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# 1- LETTER FROM THE PRESIDENT

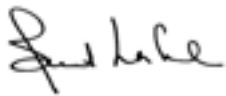
It is with pleasure that PMI-Montreal introduces the Volunteer Guide.

Drafted entirely by volunteers with PMI-Montreal's best interests at heart, it is the stepping-stone of PMI-Montreal's volunteer program.

Volunteers are the soul of PMI-Montreal, allowing us to put in place activities, create content and serve our members with efficiency and competence.

The high satisfaction rate PMI-Montreal scored on the annual PMI chapter survey is an indication of our volunteers' hard work and dedication. This guide will serve as an initial introduction to your volunteering experience and support you in your decision to become involved with and commit to the chapter.

On behalf of all our members, I thank you for being part of this network of dedicated and committed volunteers whose mission is to promote Project Management and its best practices.



**BENOÎT LALONDE**

MGP, MBA, ADM.A, PMP, CPM, OPM3, RMP

President PMI-Montreal

## 2 - INTRODUCTION

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This document has been written at the request of the PMI-Montreal HR committee. Since the very beginning, PMI-Montreal has been supported and managed by volunteer members. Because of this, it is of chief importance that volunteer members have access to clear guidelines and are supported in their involvement.

This document is intended for use by members who are volunteering in PMI-Montreal and details:

- The PMI-Montreal organization
- The benefits to volunteering within the PMI and PMI-Montreal
- The tools and policies for volunteering with the PMI and PMI-Montreal
- The volunteering process

This document will also discuss volunteer motivations, and how to manage volunteers within the specific context of PMI-Montreal.

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# 3 - ORGANIZATIONAL INFORMATION

## 3.1 PMI

Project Management Institute is the world's leading non-profit professional membership association for the project, program and portfolio management profession. Founded in 1969, the PMI delivers value for more than 2.9 million professionals working in nearly every country in the world through global advocacy, collaboration, education and research. The PMI advances careers, improves organizational success and further contributes to the Project Management profession through its globally recognized standards, certifications, resources, tools, academic research, publications, professional development courses, and networking opportunities.

### 3.1.1 THE PMI'S CORE VALUES

The PMI is driven by a clear mission and a set of values that drive how we behave and influence the expectations of our stakeholders. A common set of goals is shared within our diverse organization. Our core values are not subject to changes in the association and business environment or dictated by trends in organization management. These values are fundamental and deeply held.

As part of the Core Ideology, the PMI's Core Values are enduring and are guiding principles upon which we act.

At PMI, we believe in:

- **The impact and importance of best practices in Project Management**  
Project Management is a critical skill that has a positive impact on both organization results and society.
- **Professionalism**  
Accountability and ethical behavior ensure our commitment to PMI stakeholders.
- **Volunteerism**  
Volunteers and effective volunteer partnerships with staff are the best way to reach the Institute's goals.
- **Community**  
Bringing members of the global Project Management community together is the best way to advance the Project Management profession and facilitate growth.
- **Involvement**  
Encouraging diverse viewpoints and enabling individuals to contribute to the Project Management profession and to the Institute.

The core values provide continuity and guidance for promoting best practices in Project Management.

## 3 - ORGANIZATIONAL INFORMATION (CONT'D)

### 3.2 PMI-MONTREAL INC.

Founded in 1977 and led by a Board of Directors, PMI-Montreal is one of the most important chapters of the Project Management Institute (PMI) and is comprised of members from a number of fields: engineering, aerospace, construction, information technology, pharmaceutical, telecommunication, etc. PMI-Montreal distinguishes itself from other professional associations across Canada, and even across the world, due to its members' energy and expertise.

#### 3.2.1 VISION STATEMENT

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*To be the reference amongst professional associations regarding project management in Quebec.*

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#### 3.2.2 MISSION STATEMENT

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*To promote best practices in project management and professional advancement in Quebec*

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#### 3.2.3 CONFIDENTIALITY AGREEMENT

PMI-Montreal, like any organization, must protect itself as well as its members, and requires to volunteers to sign a confidentiality agreement. Copies of these agreements are available with the PMI-Montreal administrative team.

# 4 - VOLUNTEERING IN PMI

**“If the Board is the head of PMI-Montreal, volunteers are its heart and soul.”**

PMI-Montreal holds a position of prominence in the business community in Quebec, not only as a result of promoting the best practices for project management skills and processes, but also because of the talented individuals who volunteer their time within the organization.

One of PMI-Montreal’s primary goals is to ensure that members have opportunities to participate in the organization to support their own professional development.

The contributions of members to the administration and growth of PMI-Montreal is essential to the organization, as well as the continued development of the Project Management profession.

Volunteer members working together, solving problems, learning, and growing are what will drive PMI-Montreal into the future.

## 4.1 WHY VOLUNTEER

Volunteering with the PMI and PMI-Montreal is always a rewarding experience.

Non-profit organizations like PMI-Montreal would not survive if not for the motivated members who dedicate their time to the organization.

The PMI and PMI-Montreal offer various opportunities for individuals to contribute to the goals of the organizations, both locally and internationally by:

- **Breaking New Ground**  
Offering appealing opportunities to further develop the Project Management profession is of utmost importance for the PMI and PMI-Montreal.
- **Learning New Skills**  
The PMI and PMI-Montreal offer volunteer members opportunities for personal development and growth through learning new skills.
- **Networking and Through Affiliation**  
The PMI and PMI-Montreal volunteer opportunities are supported by individuals from various backgrounds. This allows for volunteers to meet new people, and extend their personal and professional networks.
- **Collecting PDU’s**  
The PMI volunteers collect professional development units (PDU), which can be applied against their recertification for their PMI credentials.
- **Having Fun**  
Above all else, the PMI and PMI-Montreal volunteer opportunities are fun! While working together to improve and develop the organization, everyone (project leads, resources, etc...) should enjoy the process.



## 4 - VOLUNTEERING IN PMI (CONT'D)

### 4.1.1 ORGANIZATIONAL STANDARDS AT THE PMI

PMI-Montreal has developed this document as the standard for volunteer management. Given that the organization has not formally adopted any external norms in managing volunteers, it references the Canadian Code for Volunteer Involvement as a stepping-stone for best practises.

### 4.2 VOLUNTEER INTEGRATION IN MONTREAL

PMI-Montreal requires volunteers to be involved in the planning of activities and seeks their feedback on new initiatives. PMI-Montreal ensures that all volunteers go through an orientation process related to the project they wish to participate in.

The volunteer orientation process instructs the volunteer on policies and procedures. Orientation will take approximately one hour, and is a requirement for all first-time volunteers.

The orientation program will cover the following elements:

- A description of the organization's programs, the community served, and the organization's relationships with its members
- A brief history of the organization, the structure, key staff members and their roles
- An explanation of the organization's policies, rules, and procedures
- The volunteer evaluation and performance review system
- Emergency procedures

#### 4.2.1 VOLUNTEER POLICIES

PMI-Montreal references the Canadian Code for Volunteer Involvement as a starting point for best practises. The "Code" addresses the role volunteers play in a non-profit organization, how they are engaged, how they are supported and how they are recognized.

The volunteer policies will help clarify volunteer roles and responsibilities, establish values, beliefs and direction for volunteer involvement, encourage good relationships within the team and ensure continuity and sustainability.

#### 4.2.2 VOLUNTEER TOOLS AND SUPPORT

The most important tool for volunteers is the PMI's Volunteer Relationship Management System (VRMS).

Volunteers should create a profile by completing basic information, uploading a resume and stating areas of interest. Based on their areas of interest, the system will send out an automatic

## 4 - VOLUNTEERING IN PMI (CONT'D)

email once an opportunity matching those interests is posted on the site, whether in Montreal or internationally.

Volunteer managers will offer support and will provide collaborative tools for teams to use free of charge, including teleconferencing and screen sharing.

### 4.2.3 VOLUNTEER CODE OF ETHICS

The **PMI Code of Ethics and Professional Conduct** applies to all volunteers as PMI members.

<http://www.pmi.org/About-Us/~media/PDF/Ethics/PMI-Code-of-Ethics-and-Professional-Conduct.ashx> (After downloading the document please change the extension to .pdf)

Members' responsibilities are described in detail in the guide, as well as the PMI's definitions of **Respect, Fairness, and Honesty**.

## 5 - CHOOSING THE OPPORTUNITY THAT'S RIGHT FOR YOU

Volunteering with PMI-Montreal can be an exciting and rewarding experience, but it is important for any volunteer to carefully assess the opportunities to ensure a "good fit."

Members are encouraged to read the opportunity offers, and if need be contact PMI-Montreal about any opportunities they are interested in to properly assess their level of interest, as well as the commitment that they would be expected to make.

### 5.1 ASSESSING VOLUNTEER OPPORTUNITIES

As a potential volunteer, it is important to ask yourself some questions before committing to an opportunity.

- What type of volunteer opportunity do I want to participate in?
- What skills can I bring to the table?
- What skills do I want to learn?
- What type of time commitment am I able to make?

#### 5.1.1 VOLUNTEER POLICIES

Positions vary in terms of project type and duration.

## 5 - CHOOSING THE OPPORTUNITY THAT'S RIGHT FOR YOU (*CONT'D*)

### 5.1.1.1 Short-Term Positions

Short-term positions are those associated with project-based opportunities, which are great opportunities for individuals to contribute to specific strategic initiatives sponsored by PMI-Montreal.

Short-term positions have specific timelines, mandates, and goals. Teams are assembled for the span of the project, and then disbanded upon completion.

These opportunities are conceived by various sources (either by individuals, or directly by the PMI-Montreal Board of Directors), and sponsored by PMI-Montreal. All projects must have a sponsor responsible for carrying it through the assessment and execution processes.

### 5.1.1.2 Long-Term Positions

Long-term positions are associated with organizational opportunities and the organization's management. These positions include roles such as the PMI-Montreal Board of Directors or leaders of community practices.

The BoD positions are filled for mandates of 2 years, and nominations are made by members (in good standing) via a general election. The Board of Directors then elects the officer and chairperson among its members.

These positions have detailed descriptions for the various roles and the reporting structures, as well as expectations for their time commitments.

### 5.1.2 VOLUME OF WORK

When assessing your interest in an opportunity it is important to be aware of the volume of work to be performed. Be aware of your personal and professional commitments to ensure that the volunteer opportunity does not become a burden or a point of stress.

## 6 - APPLICATION PROCESS

The PMI and PMI-Montreal volunteering opportunities are all subject to an application process. This process ensures that the selection process is conducted in a fair and transparent manner.

### 6.1 SHORT-TERM VOLUNTEER POSITIONS

Positions described in Section 5.1.1.1 are for established mandates and will be advertised via the PMI VRMS system. All interested parties will be required to submit their application for the position via this tool.

## 6 - APPLICATION PROCESS (CONT'D)

All short-term volunteer mandates will always be sponsored by PMI-Montreal. The sponsor will likely be a member from one of the committees responsible for the chapter management.

To ensure that the project is well understood by potential volunteers, the project sponsor will ensure that a clear description of the mandate is featured in the VRMS system. This will include:

- Mandate objectives
- Scope of the work
- High-level timelines
- Roles
- Type of work to be done
  - *Administrative*
  - *Research*
  - *Management*

### 6.1.1 VOLUNTEER SELECTION

Once the submission period has ended, the project sponsor will be responsible in evaluating and selecting the appropriate resources.

The sponsor's preliminary steps will include evaluating applicants vis-à-vis a project's requirements. Based on this evaluation, the sponsor will select a number of applicants who will move forward towards an interview process.

#### 6.1.1.1 Interview

Each selected volunteer will be asked to participate in an interview with the project sponsor. This is meant to be a collaborative meeting where the sponsor can ask the applicant relevant questions, while the applicant can find out more about the opportunity.

The final selection of resources will be based on the following criteria:

- **Motivational:**  
The applicant's motivations for volunteering, and interest in the specific opportunity.
- **Collaboration skills:**  
Is the applicant comfortable working within a group of volunteers?
- **Experience:**  
Does the applicant have relevant professional or life experience that will help move the project forward?

### 6.1.2 VOLUNTEER COMMUNICATIONS

All applicants will receive a response from the sponsor when the volunteer selection process concludes.

## 6 - APPLICATION PROCESS (CONT'D)

**Selected applicants will be presented with an offer to participate in the opportunity. The offer will include the following:**

- Title
- Goals
- Activities and tasks
- Outline of responsibilities
- Expected time commitment
- Project boundaries and limitations

### 6.2 LONG-TERM VOLUNTEER POSITIONS

Positions described in section 5.1.1.2 are typically elected positions. These opportunities are generally made public at the end of the existing mandates. These positions require individuals to submit their candidacy to PMI-Montreal and follow the established election process.

## 7 - EXECUTION OF VOLUNTEER OPPORTUNITIES

Once the team has been assembled, the focus of the opportunity moves to the execution phase. Like any project, it is important for the team to have the same focus towards the end goal.

This process will involve kick-starting the mandate, its execution, and the closing process.

### 7.1.1 OPPORTUNITY KICK-OFF

As soon as possible, a kick-off meeting will be scheduled. This meeting is critical to ensure that resources involved have a common understanding of the plan in order to move forward.

This meeting will be chaired by the sponsor, and include a review of the charter, introduction of the resources, and review of the plan.

### 7.1.2 ORIENTATION

Volunteer orientation is important to ensure that all resources have a good understanding of the organization, as well as the procedures involved in the PMI.

The orientation process will instruct the volunteer on policies and procedures. Orientation will take approximately one hour, and is a requirement for all first-time volunteers. It is required to take place as soon as possible after the selection process is complete.

# 7 - EXECUTION OF VOLUNTEER OPPORTUNITIES (CONT'D)

The orientation program will cover the following elements:

- A description of the organization's programs, the community served, and the organization's relationships with its members
- A brief history of the organization
- The structure of the organization, including an introduction to key staff members and an explanation of their roles
- Goals of the orientation process
- An explanation of the organization's policies, rules, and procedures
- The volunteer evaluation and performance review system
- Volunteer benefits
- Emergency procedures

## 7.1.3 EXECUTION

The project team will be responsible in developing an execution plan with fixed deliverables as well as a project schedule. This schedule includes a review cycle to ensure that the project is on track.

## 7.1.4 CLOSING VOLUNTEER OPPORTUNITIES

Upon completion of a project, all volunteer opportunities go through a closure process. This is a critical step to ensure that all of the lessons are captured.

### 7.1.4.1 Exiting Debriefs

Each team member will be debriefed at the end of their project in order to capture their impressions on the experience. It is critical that these comments are chronicled, and turned over to PMI-Montreal to improve such processes in the future.

### 7.1.4.2 Broadcasting Results

A synopsis of the events should be sent to the PMI-Montreal administrative team for inclusion on the organization website and newsletter.

### 7.1.4.3 Closure

The project leader and sponsor will finalize all open action items, and turn over all materials to PMI-Montreal.

## 8 - LEAVING A VOLUNTEER OPPORTUNITY

PMI-Montreal understands that volunteer members may feel the pressure brought on by a project, and that they have priorities within their professional and personal lives. If while volunteering for a position it becomes apparent that an individual will be unable to complete the mandate, they are encouraged to contact the project sponsor as soon as possible to discuss the situation and to work out a transition plan.

## 9 - CONCLUSION

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PMI-Montreal exists at the heart of the Project Management community because of its volunteers' commitment. Attracting new volunteers and retaining existing ones is of utmost importance to the organization. This document is intended to help guide individuals who volunteer through the process and provide them with the tools and strategies they need to be successful, and ensure that the experience is as enjoyable as possible.

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**PMI-MONTREAL INC.**  
**VOLUNTEER  
MANAGEMENT**  
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