



Project Management Institute Western Australia Chapter

Chapter Handbook

Document Name
Release Date
Release

pmi wa chapter handbook rel 2.0.1
16 August, 2011
2.0.1

Release Notice

This is a managed document. All copies of this document preceding this release are obsolete and shall be destroyed.

This is the Project Management Institute Western Australia Chapter Handbook Release 2.0.1. Draft releases of this Handbook are denoted by the third digit in the release number being incremented. When publishing an accepted release, the draft digit is set to 0 and the first or second digits are incremented by one at the author's discretion, depending on the depth of the changes. Accepted releases are deemed to be accepted by the PMI WA Chapter President.

Release Status:

Release Number	Date	Reason for Release
1.0.0	20 Oct 03	Initial release for 2004 Board
1.1.0	1 Nov 04	Revised for 2005 Board
1.2.0	5 July 05	Revised to accommodate changes in Board positions relating to the division of the Professional Development portfolio into Certification and Education as approved by the Board.
1.2.1	June 2007	Revised to allow for approval of additional Board Member(s) to attend Leaders Institute meetings.
1.2.2	Aug 2007	Revised to include new Communications Director position. Format changed in line with PMI corporate style and communications standards.
2	Nov 2007	Issued to 2007/8 Board and posted on Chapter website.
2.0.1	Aug 2011	Revised to include Associate Directors section 2.3 per Board Meeting 3 rd August 2011

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1. Introduction

1.1. Document Objectives

The purpose of this document is to provide all PMI Western Australia Chapter Board and sub-committee members with a clear understanding of their Roles & Responsibilities and to provide a standard set of procedures with which to achieve individual office bearer's goals. As such it has essentially been divided into two major sections covering the major Events in the operation of the Chapter and the Roles and Responsibilities of each of the Chapter's Officers.

This document provides detailed information not contained in the Chapter's Constitution and By-laws however, the Chapter's Constitution and By-laws will take precedence over this document. It is recommended that all Officers read the Chapter's Constitution and By-laws as a prerequisite to this document.

1.2. Updates

This document is owned by the Secretary of the Chapter and will be redistributed to all Officers following updates.

Changes require the approval of the Board.

1.3. Guiding Principles

The Chapter operates on the basis of each Officer assuming responsibility for their Portfolio as defined in the Constitution, Bylaws and this Handbook. Governance of the Chapter is the responsibility of the Board with members acting as the Sponsor for specific Events or Programs of the Chapter as required.

As could be expected of a project management professional body, the Chapter "Manages by Projects" using the PMBok as the project management framework and using an emerging project management methodology based on this.

The overriding guiding principal is that the Chapter will always act in the best interests of its members adding value to their membership entitlement whenever and wherever possible. It will also work in the interests of furthering the advancement of the project and program management profession by co-operating and partnering with academic, corporate, government and complementary professional associations and organisations.

2. The Board of Directors

2.1. Election of Board of Directors

The Western Australia Chapter Board of Directors will consist of 10 elected Directors being: President, Vice President, Secretary, Finance Director, Membership & Recruitment Director, Marketing Director, Events Director, Education Director, Communications Director and Certification Director.

All Board positions have a two year term with half the positions being vacated and re-elected every year.

A Nominating Committee comprising up to three but no less than two financial chapter members, of which at least one, (the Nominating Committee Chair), will be a non-returning Director of the Chapter Board, is created and approved by the Board in July each year.

No member of the Nominating Committee shall be running for office at the same time.

The Nominating Committee will report progress to the Board in a timely and regular basis. The Nomination Committee is to be free from Board influence in the way that it conducts its nomination work in so far as that its work is compliance with these rules set out in the Chapter Handbook, Constitution and By-Laws. Details reported to the Board by the Nominating Committee are to be only those details that are pertinent for the Board, all other details (like the number and details of nomination candidates) are to be communicated to the Board in the same manner and time as they are communicated to the Chapter members.

All Chapter Members will be sent notification of the election and positions vacant along with a nomination form by electronic mail no later than August 31.

The Nominating Committee collects names of persons interested in chapter leadership. Volunteers are actively solicited via the newsletter, website, chapter meetings, etc. The nominees will be required to nominate a first and second preference for available positions. However, the election will be for a position on the Board, not for a specific portfolio.

Each nominee must submit a signed nomination form, a short Biography and Election Statement from each candidate (no more than 250 words for each statement) is to be submitted no later than the September 20.

Re-nominating (current) Board Members are subject to the same requirements as new nominees (all positions are declared vacant on the ballot).

The Nominating Committee is to select no more than 8 candidates for the election slate. Selection will be based on a review of the candidates, including appraisal of qualifications, willingness to devote time and effort as an officer of the Chapter, length of membership with PMI, previous experience, business acumen, personal attributes and other relevant characteristics deemed necessary for a leadership role.

The Secretary will publicise the AGM to all members with the agenda at least 45 days prior to the AGM to be held mid to late October.

The final list of nominees is published on the Chapter Website and sent to all members via email with a proxy form (for enabling a financial-member who will not be able to attend the AGM, to allow another financial-member to vote on their behalf) no later than September 30 requesting members vote at the AGM.

Chapter members record their proxy by returning their proxy form to the Chapter Post Office Box or email address postmarked, or time stamped in the case of electronic mail, no later than 5 working days prior to the AGM.

Financial members may vote in the elections held at the AGM to be held no later than October 31. Postal proxy forms will be checked against members attending the AGM to ensure that members do not vote twice.

If less than 6 nominees are secured by the Committee a vote by the members will not be required. The nominee details (the Slate) is still required to be posted on the website and sent to members via email.

In the case of more than 5 nominees for the Board then an election must be held.

The positions of President, Secretary and Finance Director will be directly elected. All other positions will be elected as a Director with the New Board determining the distribution of the Director positions via a Board vote at its first meeting.

In the event of there being only one person who has nominated for the positions of President, Secretary or Finance Director then that person can be declared the winner of that position unopposed subject to member endorsement at the AGM.

In the event of several people wanting to become President, Secretary or Finance Director then a secret ballot vote must be held on the position with the person attracting the most votes being declared the winner.

The election results will comprise a simple accumulation of the votes with the most votes for a nominee securing a win for that nominee for the position being voted on. Valid proxy forms must be produced for members seeking to vote on behalf of their proxy. In the event of a tie vote in any election then the nominees that are tied will have their names "put in a hat" and one name drawn by a volunteer member of good standing from the audience at the AGM.

The election for the Director positions will be held via a ballot upon which the members will indicate by tick, cross or number the nominees that they wish to vote for. Ballots with fewer ticks, crosses or numbers than the number of Directors will be valid, but those with more ticks, crosses or numbers than the number of Directors needed, will be declared invalid.

The Nomination Committee will count the votes overseen by a volunteer member of good standing from the audience of the AGM.

The election results are presented to the AGM and endorsed by the members at the AGM.

The new officers take responsibility beginning November 1.

As soon as practical after the election at the AGM (within 15 working days), the Board holds a kick-off meeting where the elected Directors will hold a ballot to determine the final

portfolio position of each Board Member. Results of this election must be posted to all financial members within 10 working days after the kick-off meeting. The Nominating Committee Chair supervises this election.

Shortly following the kick-off meeting:

Retiring officers meet with their replacements on an individual basis for a transfer of information and responsibilities.

The current Secretary will provide all incoming Board members with the PMI Western Australia Chapter Board Non-disclosure Agreement, Chapter Handbook, PMI Policies Manual, Strategic Plan, Constitution and Bylaws. The Non-disclosure agreements will be signed by the in-coming Directors and returned to the Secretary.

The November Board Meeting will be a joint meeting with retiring Board members attending as guests.

At a subsequent meeting, (no later than January 31), the incoming Board must endorse a new Strategic Plan and document their goals for the incoming year, with the outcome presented to the members at the next available Chapter Meeting in February.

See Appendix 5 - Nomination & Election Ballot Templates for a sample nomination form and ballot sheet.

2.2. Roles & Responsibilities

The generic roles & responsibilities of the Board members are detailed within the Chapter's Constitution and By-laws. This document provides more specific content on each Officer's Roles & Responsibilities.

2.2.1. General Responsibilities

Each Board member represents the Chapter as an Officer of the Chapter and as such has the following generic responsibilities in addition to the specific responsibilities relating to their portfolio.

1. Regular attendance at Chapter Meetings
2. Attendance to at least 75% of Board meetings throughout the year
3. Apologies by Board members unable to attend a Board meeting must be received by the Secretary at least 2 working days prior to the Board meeting, except in emergency situations.
4. Board members who miss two consecutive Board meetings, or whose attendance is less than 75% after meetings and without satisfactory explanation, may, subject to a resolution carried by 50% of the Board Directors, be requested by the President to resign from the Board unless there are extenuating circumstances;

5. In the event of refusal to resign from the Board, a Board member's removal from the Board may be sought in accordance with the By-laws Article V – Board of Directors, Section 6.
6. Responding promptly to communications from Board and Chapter members via email, phone or fax.
7. Notify Secretary of any change of address, phone, email, etc.
8. Maintain accurate personal details in the PMI Online database
9. Notify President and Secretary of any expected extended absence
10. Submit portfolio reports as required for Board meetings (see section 3.1, Board Meetings).
11. Submit portfolio articles for newsletter according to published schedule
12. Keep the Marketing Director informed of any additions, changes, or deletions to content on the web site relevant to their portfolio.

2.2.2. President

The President of the Chapter shall act as Chair and Chief Officer of the Chapter.

Roles and Responsibilities

1. Prepare and distribute the Agenda for monthly Chapter Board meetings and chair such meetings
2. Direct the activities of the Board towards Chapter goals and objectives including the development and maintenance of the Chapter Strategic Plan.
3. Appoint Nominating Committee members each year to conduct Chapter elections in an effective and timely manner.
4. Appoint replacement Board members to vacant positions, subject to the Board's approval.
5. Ensure that incoming Officers are formally and adequately briefed on the Chapter Constitution, Bylaws, Handbook and Strategic plan prior to each Board member's first Board Meeting.
6. Distribute all recurring and other PMI HQ correspondence to Officers in a timely manner.
7. Submit to the appropriate PMI representatives and PMI HQ an annual application for charter renewal, pursuant to the Local Chapter Guidelines & Policy Handbook. The Secretary shall assist in the compilation of the application.

8. Complete the Annual Awards survey and submit to PMI HQ according to the published schedule.
9. Represent the Chapter, or appoint an appropriate alternate as a member of the Australian PMI Council (APC).
10. Represent the Chapter, or appoint an appropriate alternate, to at least one PMI World Congress and Leadership meeting each year. See PMI Leadership Conference and PMI World Congress on page 27 for detail of funding.
11. Represent the Chapter, or appoint an appropriate alternate, at all Chapter Events.
12. Liaise at the appropriate level with business partners of the Chapter.
13. Maintain and deliver all permanent records to the position successor.

2.2.3. Vice President

The Vice President provides assistance to the President in the discharge of their responsibilities on an as required basis and acts in that role whenever the President is unavailable.

The Vice President shall become President if that office becomes vacant. The President shall appoint other vacant offices with the unanimous approval of the Board.

The Vice President shall act as the first line of Sponsorship or project management for Special or Strategic Projects that are approved by the Board.

Roles & Responsibilities

1. Project management and / or oversee the special projects portfolio.
2. Develop and manage the budget pertaining to special projects-based activities.
3. Maintain the special projects-based webpage content on the Chapter's website.

2.2.4. Secretary

The Secretary supports the Board and the Chapter by maintaining the records of the Chapter and liaising with Board members in dealing with external entities including PMI HQ.

Roles & Responsibilities

1. Schedule and publish schedule of Board meetings before the start of the year.

2. Keep records of all proceedings, actions, and board meetings of the Chapter.
3. Ensure meeting minutes and action items are distributed to all board members within one week of each meeting.
4. Maintain a register of Board member attendance on a year to date basis throughout the year in the Minutes of each Board meeting and advises the President in the event of any non-compliance with the Board attendance policy.
5. Maintain and archive all documentation attached to Board papers and/or deemed to be required in Chapter records by the Board.
6. Consolidate measurement metrics submitted by Board members and presents the Chapter Dashboard in the Secretary Board report each month.
7. Conduct internal and external correspondence of Chapter liaising with the board as required.
8. Maintains and archives official files -, including copies of the Constitution, Bylaws, Chapter Handbook, legal Agreements with other entities, Incorporation documentation, and the Chapter Strategic Plan.
9. Maintain and archive all documentation required to ensure compliance with Chapter Charter including Charter renewal and including material to allow validation of Chapter Awards.
10. Monitor that the Chapter operates in accordance with its Charter and legal obligations.
11. Maintain and distribute Board Contact details in a timely manner.
12. Collect external correspondence from the Post Office and distribute it accordingly.
13. Develop and manage the budget pertaining to Board support and administrative-based activities.
14. Maintain the Board members webpage content on the Chapter's website.

2.2.5. Finance Director

The Finance Director is responsible for all financial matters of the PMI Western Australia Chapter and any subsidiary groups (referred to herein collectively as the Chapter), except where specific arrangements have been made to the contrary. In general this will require authorisation and issue of payments, collection of debts, reconciling and monitoring accounts and reporting and managing the overall financial position of the Chapter.

Roles and Responsibilities

1. Manage all Chapter financial transactions including the collection of all Chapter dues from PMI HQ, payments for Chapter meetings or special events, and the payment of all Chapter bills in accordance with Chapter Board directives.
2. Maintain a permanent file of the financial business of the Chapter.
3. Establish and maintain all required Chapter bank accounts and/or similar financial transactions, arranging for officer signatures as required.
4. Maintain any usernames, passwords and PIN numbers for phone and Internet banking.
5. Submit all tax related filings as required.
6. Develop an annual operating budget and forward to the Board for inclusion in the annual application for charter renewal.
7. Develop an annual financial statement of the Activities of the Chapter and provide to the Board for presentation at the Annual General Meeting each year.
8. Prepare and present monthly financial statements at each monthly Board Meeting.
9. Maintain an inventory and stock of any Goods held by the Chapter and duly report on them in monthly reports to the Board.
10. Coordinate the development, maintenance and reporting of the Chapter's budget and other financial reports.

The Finance Director also holds ostensible authority to make administrative and other reasonable purchases to facilitate the Chapter's operation without Board approval up to \$500. This may include but is not limited to:

- Stationary and printing
- Postal needs
- Business cards
- Gifts for speakers, and
- Any item above this threshold of \$500 will require approval from the Board.

Revenue

The primary source of income is from Chapter Dues paid by members. New and existing members pay their PMI subscriptions and Chapter Dues directly to PMI HQ.

PMI HQ then forwards the Chapter Dues on to the Chapter on a quarterly basis via a direct credit transfer to the Chapter bank account. PMI HQ sends on a monthly basis the DEP (Data Exchange Program) report which includes the monthly Chapter transaction report. The Finance Director must reconcile all amounts transferred quarterly against these reports.

The Chapter undertakes a number of events in any given year. The Finance Director shall be responsible for any seed funding and or float(s) provided from the Chapter's accounts. If the Finance Director is unable to attend a Chapter event then they must ensure that a suitable Board member can assume responsibility on their behalf. The Finance Director or their nominated representative must deposit all receivables within 5 working days of the receipt of the funds in order to minimise the risk of money loss.

Expenses

The Treasure is required to make prompt payment of all legitimate expenses based on written receipts. Expenses from third parties will be approved by the Board Member responsible for the project or activity.

Investments

The Finance Director periodically transfers any surplus funds accumulated in the current cheque accounts to the Investment Account ensuring that surplus funds attract a higher rate of return. Any recommendations to invest additional amounts into secure investment instruments such as fixed term deposits, managed funds, bonds and the like will require Board approval before implementation.

Authorities & Payments

The Finance Director and one other authorised signatory must sign all cheques. The most suitable signatories include the President, Vice-President and Events Director.

Bookkeeping

The Finance Director must keep an accurate record of all Income received and Expenditures incurred to facilitate reporting and future auditing of all financial records. A suitable spreadsheet has been designed for this purpose. The spreadsheet contains a Cash-Book worksheet outlining details of all Income and Expenditure itemised into the different reporting categories. Other 'linked' worksheets in the spreadsheet provide Profit and Loss Statement and Balance Sheet Reports.

Budget Setting and Control

The Finance Director is responsible for developing an annual operating budget for the Chapter from input received from other Board Members. This budget will form

part of the annual application for charter renewal submitted to PMI HQ by the Chapter President.

Filing

All hard copies of the Financial records, invoices, receipts and spreadsheets are filed by the Finance Director in two separate folders: A Current File and An Archive File. The current file contains all records pertaining to the current fiscal year whilst the Archive file will hold the financial records for all previous years. Financial records must be kept for a period of at least seven years.

Goods and Services Tax (GST)

The Chapter is not currently registered for GST and as such can not claim tax inputs for items purchased for a refund of GST nor can GST be added to any item charged by the Chapter (e.g. meeting fees).

All financial statements and correspondence issued by the Chapter must quote the Chapter's Australian Business Number (ABN). By law, all receipts issued by the Chapter should clearly state that there is no GST applicable to the charge.

As the Chapter is not registered for GST, quarterly Business Activity Statements (BAS) are not required to be completed for the Australian Tax Office. The Chapter will be required to register for GST when annual revenue exceeds \$100,000.

WA Chapter Australian Business Number (ABN): 50 226 258 311

Income Tax

Although PMI Western Australia Chapter is a non-profit organisation Income tax is payable under specific circumstances such as Bank interest received above a nominated ceiling amount. It is the responsibility of the Finance Director to monitor such tax requirements and take whatever necessary actions to comply with the Income tax requirements of the Australian Taxation Office.

Auditing of Accounts

Auditing of the accounts has not been previously undertaken due mainly to the size and maturity of the Chapter. Commencing in 2004, the Board should budget for the accounts to be audited by a qualified CPA Accountant prior to the Annual General Meeting.

2.2.6. Marketing Director

The Marketing Director is responsible for developing and implementing strategies that pro-actively market and promote the Western Australia Chapter and the Project Management profession.

Marketing & Promotion crosses other Board portfolios such as Events, Professional Development and Membership and Recruitment.

Roles & Responsibilities

1. Branding / Advertising - Develop and maintain organisations' awareness of the profession, the Project Management Institute and specifically, the Western Australia Chapter, and their value within the business community. Tasks include advertising in various media, both general and tailored PMI presentations to organizations plus use of the Chapter web site and Newsletter.
2. Alliances / Relationships - Establish alliances / relationships with other professional organizations, major recruitment companies, emphasising the value of PMI membership and PMP certification to the organisation and the individual. This may include alignment with selected educational institutions.
3. Sponsorship - Obtain sponsorship of events organised by the Western Australia Chapter e.g. Conferences, Workshops, Seminars, and Meetings.
4. Advertisements – Drive the various advertising options for organizations through the Western Australia Chapter media and events.
5. Liaison – Work closely with other Western Australia Chapter Board Members to ensure that initiatives get maximum exposure to members and the project management community.
6. Budget – Work closely with other Western Australia Chapter Board Members to ensure that the Marketing budget is used prudently in the interests of the Western Australia PMI Membership
7. Manage the Chapter Webmaster to ensure the web site is kept current and updates are provided in a timely manner.
8. Establishing communication with the other Australian PMI Chapters to communicate and publicise all Australian Chapter events.
9. Develop and manage the budget pertaining to marketing-based activities.
10. Coordinate the updates and administration of the webpage content on the Chapter's website.

Webmaster

Reporting to the Marketing Director, the Webmaster is responsible for maintaining an accurate and up-to-date Internet site that presents a favourable public image of the PMI Western Australia Chapter, in keeping with the Chapter's overall aims and objectives.

In doing this, the Webmaster's objective should be to create a single source of information on all aspects of PMI Western Australia Chapter for both members and the public at-large.

Internet Address

WA Chapter Web Address: <http://wa.pmichapters-australia.org.au/>
or <http://www.wapmi.org.au/>

This site is hosted by Reliable Solution – <http://www.reliablesolution.com/>

Web Site Content

Each Board portfolio owner is responsible for initiating updates to web site content applicable to their portfolio. This is done by emailing the updated content to the Marketing Director, or by providing the Marketing Director with written instructions on the nature of the required update, including the location of the content source (printed publication, other web site, meeting minutes, newsletter, etc).

New or updated content can be emailed to the Marketing Director at any time. The Webmaster will make the necessary changes, and then post to the site.

It is vital that web pages be kept up-to-date. This includes the "Events Calendar" and "Notice of Next Meeting" which must not be allowed to remain visible once the meeting has taken place. The pages relating to the Chapter Meeting are updated by the Web Master based on details supplied by the Events Director.

When updating the content of any page, the Webmaster should always change the "last updated" date on that page, and on the Home Page. Thus, the Home Page ([./index.htm](#)) is always updated.

Web Page Ownership

Marketing Director	index.htm , about.htm , archive.htm , board.htm , links.htm , newsletter.htm , sponsors.htm
Events Director	events.htm , eventregmonthyear.htm , meetings.htm
Membership & Recruitment Director	membership.htm
Professional Development Director	pdevelopment.htm , pmp.htm , currentpmps.htm

Update Procedure

The WA Chapter Webmaster maintains the HTML pages and content using appropriate authoring tools.

There are no restrictions on the number of updates that can be sent to the WA Chapter Webmaster each month. However, 2 updates per week would normally be regarded as a practical maximum.

Web Site Schedule

When	What	Who
Chapter Meeting -7	E-mail requesting updates to website	Marketing Director to Board
Chapter Meeting -2	Summarise and send updates	Marketing Director to Webmaster copy Board
Chapter Meeting -1	Make changes as per the summary to local copy of website	Webmaster
ASAP	Update website	Webmaster
Chapter Meeting +1	E-mail to inform website updates loaded	Webmaster to Marketing Director

Newsletter Editor

Reporting to the Marketing Director, the Newsletter editor is responsible for producing and publishing the WA Chapter's newsletter at the end of each quarter.

It is the responsibility of all Board Members to provide any news or updates that they feel appropriate to the Newsletter Editor on a timely basis.

The suggested minimum content of the Quarterly newsletter is:

- Chapter News;
- Editorial;
- Calendar of events;
- Membership summary – new members, renewals, issues
- Chapter Board contact details;
- PM humour, proverbs etc;
- Sample PMP Exam question (and answer);

Suggested additional content if provided by contributors:

- Project Management tips;
- Article on an aspect of Project Management;

- Project Management Book Review;
- PMP Certification news;
- Vendor advertising.

A PDF copy of the newsletter will be emailed to all WA Chapter members. The Marketing Director will provide the Webmaster with a PDF copy of the newsletter for inclusion on the WA Chapter web site. Printed copies of the current newsletter will be available on the attendance desk at all Chapter events.

Newsletter Schedule

When	What	Who
End of Quarter – 1 month	E-mail requesting updates to Newsletter	Marketing Director to Board, Newsletter Editor
End of Quarter – 2 weeks	Create Draft Newsletter	Newsletter Editor
End of Quarter – 2 weeks	Send Draft for review	Newsletter Editor to Board
End of Quarter – 1 week	Send final version of Newsletter incorporating review comments	Newsletter Editor to Marketing Director & Secretary
End of Quarter	Distribute PDF version of Newsletter	Secretary to mailing list
End of Quarter	Create 20 copies of Newsletter for distribution at chapter meetings	Secretary
End of Quarter	Add newsletter to website	Marketing Director to Webmaster

2.2.7. Events Director

The Events Director is responsible for the development and delivery of programs relating to project management for each scheduled Chapter meeting and for the smooth operation and co-ordination of Chapter activities. The content of these programs is to be consistent and in accordance with the objectives of the Chapter and with approval of the Chapter Board.

Roles & Responsibilities

1. Prepare programs schedules and agenda showing all planned Chapter activities for the next six months, including speaker and vendor presentation.
2. Direct the presentation of special seminars, meetings and vendor exhibits, which the Chapter Board deems beneficial to the membership.

3. Solicit other Chapter Members to assist with the project management and running of Chapter Special Events.
4. Liaise with the Marketing Director to actively promote Chapter programs.
5. Monitor and report on requirements, participation levels and general membership feedback.
6. Manage all physical arrangements for each Chapter Meeting.
7. Develop and manage the budget pertaining to events-based activities.
8. Maintain the events-based webpage content on the Chapter's website.

2.2.8. Education Director

The Education Director will be responsible for all Chapter ongoing (post-certification) and other professional development education and training activities.

Roles and Responsibilities

1. Provide the membership with professional workshops and seminars designed to improve their development in the field of project management.
2. Develop and maintain relationships with educators and trainers whom may present at professional development workshops.
3. Maintain Chapter relationships with centres of education.
4. Liaise with the Director Marketing in the promotion of PMI educational opportunities.
5. Liaise with the Events Director to ensure all events are promoted along with their corresponding PDUs.
6. Coordinate the management and administration of all education-based events, with the exception of the monthly Chapter meetings.
7. Develop and manage the budget pertaining to education-based activities.
8. Maintain the education-based webpage content on the Chapter's website.

Education Events

Education Event Logistics

The Education Director is responsible for ensuring that all PMI Western Australia Chapter Professional Development Events are run in a professional manner with appropriate facilities and skilled instructors.

Bookings

The Education Director will handle bookings for Professional Development Events unless delegated to an organising sub committee. As a rule payments for events will be collected prior to acceptance of a booking.

Instructors

The Education Director will ensure that appropriate instructors / facilitators are available for all Professional Development Events and that they are properly briefed on the expected course outcomes. On completion of a course or PMI Western Australia Education Event the Education Director will ensure that small gift of appreciation is presented to the instructor if appropriate.

Rooms and Equipment

The Education Director is responsible for ensuring that all Professional Development Events have suitable facilities and equipment. Donation of rooms and equipment should be sought from member corporations and business partners, prior to organising a paid facility.

Budget

The Education Director is responsible for ensuring that appropriate budget is forecast by the Finance Director in the yearly budget to cover all potential costs associated with Professional Development Events.

Education Event Marketing

The Education Director is responsible for ensuring that all Professional Development Events are well publicised via the Chapter Newsletter, Direct Email and the Chapter Web Site. The event calendar on the Chapter Web site is to be kept up to date with the latest schedule of events.

2.2.9. Certification Director

The Certification Director will be responsible for all Chapter CAPM and PMP development, certification and examination activities.

Roles and Responsibilities

1. Provide the membership with certification-based training programs and related workshops designed to improve their likelihood of passing the CAPM or PMP examination.
2. Maintain Chapter relationships with centres of certification training.
3. Liaise with the Director Marketing in the promotion of the CAPM and PMP certifications.

4. Co-ordinate and maintain CAPM and PMP certification workshop materials and modules to ensure they reflect the current PMBok® Guide and the types of changes being made to the PMI certification examinations.
5. Maintain up-to-date information on the current certification requirements as defined by PMI and ensure this is conveyed to Chapter membership via Chapter meetings, newsletters and the website.
6. Maintain and sell stock of the PMBok® Guide and other related certification-based documentation.
7. Coordinate the management and administration of all certification-based events.
8. Develop and manage the budget pertaining to certification-based activities.
9. Maintain the certification-based webpage content on the Chapter's website.

Certification Events

Certification Event Logistics

The Certification Director is responsible for ensuring that all PMI Western Australia Chapter Professional Development Events are run in a professional manner with appropriate facilities and skilled instructors.

Bookings

The Certification Director will handle bookings for Certification Events unless delegated to an organising sub committee. As a rule payments for events will be collected prior to acceptance of a booking.

Instructors

The Certification Director will ensure that appropriate instructors / facilitators are available for all Certification Events and that they are properly briefed on the expected course outcomes. On completion of a course or PMI Western Australia Education Event the Professional Development Director will ensure that small gift of appreciation is presented to the instructor if appropriate.

Rooms and Equipment

The Certification Director is responsible for ensuring that all Certification Events have suitable facilities and equipment. Donation of rooms and equipment should be sought from member corporations and business partners, prior to organising a paid facility.

Budget

The Certification Director is responsible for ensuring that appropriate budget is forecast by the Finance Director in the yearly budget to cover all potential costs associated with Certification Events.

Certification Event Marketing

The Certification Director is responsible for ensuring that all Certification Events are well publicised via the Chapter Newsletter, Direct Email and the Chapter Web Site. The event calendar on the Chapter Web site is to be kept up to date with the latest schedule of events.

PMP Training

One of the key Certification Events provided by the Chapter is the PMP Preparation Course. A schedule outlining the dates of the courses should be published 12 months in advance to ensure that members considering their sitting for the PMP exam have adequate time to plan their attendance.

The Certification Director keeps a list of all approved instructors and liaises with the lead PMP Preparedness Session Instructor to schedule instructors.

2.2.10. Membership Director

The Membership Director will be responsible for the development and maintenance of Chapter membership and for the maintenance of Chapter membership database. They will also be responsible for identifying, negotiating and putting in place benefits for the PMI members.

Roles & Responsibilities

1. Serve as the general public interface for membership information.
2. Promote the benefits of membership to individuals and corporations.
3. Provide general member instructions and data via the website and direct information as required (phone, email, post, etc)
4. Support the Director – Marketing with promotion of PMI to prospective members.
5. Work with the Administrator – Membership, to maintain the membership database and Chapter mailing lists.
6. Provide membership information and statistics to the Chapter Officers and general membership.
7. Serve as liaison to PMI HQ for database updates/information.
8. Maintain membership statistics and metrics on membership

9. Contact non-renewing members encouraging them to renew.
10. Monitor prospective members (i.e. people who have joined PMI from this area but who have not joined the Chapter) and send email with info about the Chapter, encouraging them to join.
11. Identify appropriate 'benefits' that would be of value to PMI members
12. Contact relevant companies and negotiate discounts, allowances or special prices for items to be made available for PMI members – identify any 'quid pro quo' to support this, such as promotion at Chapter Meetings, on the PMI website etc.
13. Determine where, when and how these benefits should be made available to PMI members, e.g.: Special events, via Newsletter or website, separate e-mail, etc.
14. Develop and manage the budget pertaining to membership-based activities.
15. Maintain the membership-based webpage content on the Chapter's website.

2.2.11. Communications Director

The Communications Director is responsible for all internal and external publications and announcements distributed by the Chapter to members and the outside community, including the Chapter's Newsletter and the Chapter's web site.

The Director is responsible in particular for both the Newsletter and web site and may fill one or both of these roles in addition to his/her role as Director.

Communications crosses other Board portfolios such as Events, Membership, Marketing and Education, and the Director will assist publication and distribution activities by such Directors, in accordance with the documented communications policies of PMI HQ.

Roles and Responsibilities

The Director – Communications has the following responsibilities:

1. Manage the chapters Communications Plan which includes the Chapter's publications, newsletters and press announcements.
2. Be responsible for the appointment of newsletter editor and web master each year and provide ongoing accountability for their deliverables.
3. Liaise with the Membership Director to obtain contact information for PMI members for distribution of publications by email or post from the membership database

4. Liaise with the Directors of Events, Membership, Marketing and Education in the promotion of PMI events and educational opportunities.
5. Review proposed publications or announcements prepared by these Directors to prepare them for publication or distribution to members and recommend appropriate distribution methods and procedures.
6. With the co-operation of other Board members, assist in the distribution of routine announcements to members, including events, education and marketing.
7. Solicit articles and other input from members for publishing.
8. Consult with and provide copies of publications to the Chapter Webmaster to facilitate any required updates to the Chapter web site.

2.3. Associate Directors

The Board of Directors may appoint Associate Directors to meet the changing needs of the Board and the Chapter on an ongoing basis and to assist with programmes undertaken by the Chapter. The Associate Directors shall have no legislative or managerial authority. The tenure of the Associate Director shall be limited to the same as that of the Board member, for which they are associated with.

3. Administration

3.1. Board Meetings

Chapter Monthly Board meetings will be scheduled by the Secretary before the start of the year and will be published and maintained in the Board Minutes. All Board members are required to send an electronic Portfolio Report (using the template in Appendix B) to the Secretary by Close of Business, four working days prior to the Board Meeting. Copies of all external correspondence inwards and outwards and any other correspondence deemed “significant” by the Board member shall be attached to the report to be filed in the official records of the Chapter by the Secretary.

The President will prepare and include an Agenda for the Board meeting with their report.

The secretary will redistribute all Board Reports along with the meeting agenda by Close of Business two days prior to the Board Meeting.

The President will chair each meeting according to the published Agenda. In the event the President cannot attend a meeting or prepare the Agenda they must ensure that this is delegated to the Vice President or, in their absence, a pre-arranged Board Member.

The Secretary will prepare and distribute the minutes to the Board meeting by no later than Close of Business three working days following the meeting.

3.2. Chapter Strategic Planning

The Chapter formally developed a Strategic plan in 2000 which was subsequently formalised as the Chapter’s “Blueprint” plan in 2001. The Board will maintain this. The strategic plan will be delivered via various projects sponsored by members of the Board using Volunteer members from the Chapter.

Each project will be initiated using Terms of Reference (TOR) formulated by the Board and based on a standard template.

The President is ultimately responsible to ensure that the strategic plan remains current, relevant and consistent with the Chapter Vision, Mission and objectives.

Whereas the Constitution, By-laws and this Handbook cover the operational aspects of the Chapter, the Chapter’s Strategic Plan provides the strategic intent for the Chapter. This will be made available to all Officers at the annual kick-off meeting of the Board described in Section 2.1 Election of Board of Directors above.

3.3. Chapter Charter Renewal & Awards

The President, using information compiled by the Secretary, will complete and submit the annual Charter Renewal and Awards to PMI HQ by the PMI HQ published date (usually end January). Besides the President’s input, the Charter renewal requires input mainly from the

Finance Director and the Membership Administration Director. However, most members of the Board should be consulted to ensure the following sections are agreed and included:

- Accomplishments in the last 12 Months;
- Component Challenges;
- Comments or suggestions for PMI Headquarters; and
- Component objectives for the forthcoming year. This requires Board input in the areas of Finance, Education, Networking, Membership Development, Communications and Collaboration

3.4. Bank Accounts

The Chapter maintains the following Bank Accounts:

Account Name:	PMI Western Australia
Bank	National Australia Bank
Branch:	Leederville
BSB:	086 297
Account No.	5666 88721
Purpose:	Current cheque account to cater for every day transactions

Account Name:	Not currently used
Branch:	
BSB:	
Account No.	
Purpose:	Investment account for surplus Chapter funds accumulating in the current cheque account.

Internet Banking	www.national.com.au
Phone Banking	131013

With the exception of hard deposits, most banking can be maintained through Internet Banking using a Customer ID and password. The same Customer ID along with a separate PIN number can also be used to access the account through telephone banking.

For obvious security reasons both the customer number and password are not published in this document. The Finance Director keeps a record of this information in a secure place for use in conducting Internet banking. **It is the Finance Director's responsibility to change all passwords and PIN numbers whenever the Finance Director's role changes.**

All Bank Statements received must be reconciled by the Finance Director against the Cash Book and filed in the Financial Records, Current File.

3.5. Post Office Box

The Chapter's postal address is:

PO Box 587
Leederville WA 6903

The Secretary is responsible for the Post Office Box key and emptying the Box on a weekly basis at the minimum.

3.6. Board Member Expenses

General expenses to a maximum of \$50 are reimbursable to Board Members for expenses directly related to their portfolio. Requests for expense payments must be made to the Finance Director using the Expense Form and accompanied with receipts. **No expenses will be reimbursed without full receipts.**

Expenses for entertainment will only be reimbursed with prior approval of the Board.

3.7. Chapter Email List

The Chapter email list consists of current chapter members and prospective members. The Membership and Recruitment Director is responsible for the email list.

All email must be sent with addressees in the bcc field so as not to reveal email addresses.

3.8. Privacy

The Chapter is bound by the Australian Privacy Act. The privacy of members' contact details is of vital importance and reflects on the ethics, integrity and professionalism of the Board and the Chapter. All Board Members are responsible for observing the following guidelines in relation to members' privacy.

4. All email sent to the members' or non-members' email list will be sent with the email addresses in the BCC address field so as not to disclose email addresses to other members.
5. Member's contact and personal details shall not be disclosed for any reason without the consent of the member in question.
6. Attendees (members and non-members) of Chapter events names or contact details shall not be disclosed without their consent.

3.9. Annual General Meeting

The Annual General Meeting will be held in October each year when the President will present a Summary of the Chapter's accomplishments, challenges and objectives based on the Charter Renewal during the year and outline any strategic initiatives that the Board has

committed on behalf of the Chapter in accordance with its Constitution. Similarly the Finance Director will present the financial situation of the Chapter.

The Nominating Committee will also conduct an election of Board members at the Annual General Meeting. See section 2.1, Election of Board of Directors.Events

4. Chapter Meetings

The Events Director will schedule regular Chapter Meetings according to the style and frequency agreed by the Board.

The Events Director and the President determine the Event program.

At Chapter Meetings, the President is required to attend prior to the event to assist with receiving guests and make any last-minute adjustments to the meeting program. Should the President be unable to do this prior arrangements should be made for another Board member (generally the Vice President) to assume this responsibility.

The Events Director is responsible for the organising and running of a Chapter Meeting. They are responsible for ensuring that the following tasks are undertaken to maximise the professionalism and visibility of the event.

1. The Events Director organises a suitable guest speaker on a topic or relevance to members. Generally the Guest Speaker is not paid and should not be a straight promotion for their products or services.
2. Guest Speaker is sent a Guest Speaker confirmation letter (see appendix for template).
3. The Event RSVP form on the Chapter web site is updated with the event details.
4. The Events Director, with input from the Guest Speaker, identifies and sources any presentation requirements not supplied by the venue, for example, projectors or screens.
5. Email invitation sent to member and non-member email list at least three weeks prior to the event. (See Section 3.7, Chapter Email List for procedures and policies for sending emails).
6. RSVPs are sent to the Events Director via email from a form on the Chapter web site.
7. A reminder email is sent to the member and non-member email list one week prior to the event.
8. Three days before the event: The Events Director confirms the event will go ahead based on numbers. Note the event does not need to make a profit, just enough numbers to make it worthwhile.
9. Two days before the event: The Events Director supplies the Event Registration spreadsheet to the person printing the name badges. Name badges are printed with the WA PMI logo on members' badges.
10. The Events Director takes the Meeting Kit (see below) and any special presentation requirements to the Event
11. At the Event: The Events Director ensures the attendance table is staffed.

12. The Events Director identifies a suitable volunteer to give the Vote of Thanks to the Guest Speaker.
13. The President welcomes guests and makes any Chapter announcements.
14. The Events Director introduces the Guest Speaker.
15. The Events Director introduces the Vote of Thanks. The Vote of Thanks is given along with a suitable gift.
16. The Finance Director takes all monies collected. The money is banked in a timely manner and the venue paid according to their trading conditions.

The meeting kit consists of:

- Cash tin
- Pre-printed name tags
- Copies of current and past PMI journals
- Feedback forms to be placed on seats
- Attendance list with member, non-members and any discounted members marked
- Marker pen for writing nametags for non-RSVPs
- Gift for Guest Speaker

4.1. Chapter Event Fees

Members and non-members are charged a fee for attending a Chapter event determined by the Event Director and any relevant organising event committee. A discount is offered to Chapter Members and a further discount to retired, student or members that have been determined by PMI HQ as being in hardship (see glossary of terms).

Member Type	Discount
Retired Members	50%
Hardship or retired members	50%
Students	75%

4.2. Vendor of the Month (VoM)

The Events Director is responsible for soliciting and scheduling those organisations participating in the VoM programme.

This is a marketing opportunity for the organisation concerned, provides additional value and information to attending members, and generates a small amount of additional revenue for the chapter (currently \$120 per vendor).

To sponsor a PMI Western Australia event, such as a Chapter Meeting, vendors will have the opportunity to present their products or services to a targeted professional Project Management community in Perth. The sponsorship includes:

- Entry to the meeting for one person (\$35)
- A 10-minute presentation at the meeting to discuss the company's products and services;
- Table space for company brochures and materials;
- A website ad on the home page for one month prior to the presentation;
- An e-mail about the company's presentation sent to our email distribution list; and
- An A6 sized ad in the PMI Western Australia Newsletter

The charge (payable in advance) to the VoM for this participation will be agreed by the Board at the start of each membership year, and advised to the VoM as part of the proposal sent one month before the meeting. The Finance Director shall raise an appropriate invoice on the VoM on advice from the Events Director (or committee nominee) of the invitation being sent.

All liaison between the VoM and the Board is to be managed by the Events Director as a single point of contact with the VoM's representative(s). The VoM is responsible for furnishing any marketing collateral/advertising material/graphic images for publication by the chapter, and is to supply these through the office of the Events Director (or committee nominee) for distribution to the Webmaster, Publications Director, etc.

Logistic support at the meeting for the VoM's representative will be provided by the Events Director including liaison with the owners of the meeting venue for facilities, equipment, etc.

4.3. Other Australian Chapter Events

Australian Chapter Presidents have committed to the APC to communicate and publicise each others events offering reciprocal attendance fees. The Marketing Director is responsible for Establishing communication points between Chapters and publicising all events in the Chapter newsletter and on the Chapter website.

4.4. PMI Leadership Conference

The PMI Leadership Institute conference meetings coincide with the PMI World Congresses. The Leadership Institute meeting is an important event that helps establish communication and networking with Leaders of components throughout the world to share best practice and PMI knowledge needed for the successful management of a Chapter.

PMI HQ strongly encourages Chapter Presidents to attend a Leadership INSTITUTE Conference annually, particularly in their first year of presidency. To encourage the leaders' attendance, PMI HQ usually offers part funding for the attendance of one delegate per chapter.

The Board shall consider the following to determine the suitability and appropriateness for attendance by Board members:

- The nature and objectives of the event;
- The value and benefits to the Chapter of Board member attendance;
- The benefits to the Chapter of networking with PMI HQ and Regional leadership;
- The event location, duration and timing; and
- The travel time and expenses to be incurred by the Board member(s) attending.

The primary rationale for attendee selection shall be the benefits accruing to the Chapter of one or more Board members attending.

The Western Australia Chapter is committed to encouraging the current President to attend the Asia Pacific Leadership Conference each year and will assist with funding as funds permit. Greater priority is given to a President in his or her first year of office.

Formal Board approval of attendees and associated travel expenses is required prior to commitments being made.

Travel funding required to attend such events shall be budgeted at the beginning of the year as part of the Chapter annual Budgeting process and formally approved by the Board. However, as the amount of funding available from PMI HQ is generally not known until a few months prior to the conference, it is difficult for the chapter to budget for any shortfall. Generally, the combined funding available from PMI HQ and the Chapter funds should aim at covering the following expenses;

1. Economy class air fares, departure taxes, travel insurance, reasonable ground transport expenses between airport and hotel, such as taxi, train and bus fares.
2. Asia Pacific Leadership Institute conference meeting fees (currently free for one attendee per component)
3. Hotel accommodation in reasonably priced hotel facilities. Where travel to the conference is extensive, the accommodation should allow for an extra day prior to the conference
4. In all cases best endeavours shall be made to minimise travel expenses via special fares and deals.
5. Corporate support shall be actively sought by Chapter members to offset the above travel expenses including coverage of travel insurance if possible
6. Chapter members shall be responsible for all incidental expenses including items such as meals, entertainment, phone calls, internet and associated telecommunications costs, laundry and dry cleaning.

Expense Claims with receipts for all expenditure shall be submitted to the Treasurer within five working days of travel completion for approval and reimbursement.

Concurrent with Expense Claim submission, details of corporate support shall be provided to the Treasurer to enable raising of invoices for reimbursement of air fares, accommodation and other travel expenses prepaid by the Chapter.

4.5. PMI World Congress

PMI World Congresses are a valuable forum for project management knowledge and networking. The Chapter will publicise and encourage attendance at all World Congresses.

While the World Congresses are usually held immediately following the Leadership Conferences, the Chapter does not fund the accommodation and conference fees for any chapter representatives.

5. Membership Procedures

5.1. New Members

Each month the President will send all new members a welcome letter welcoming them to the Chapter and informing them of chapter events and facilities. New members are sourced from the DEP received from PMI HQ each month.

Refer to the template welcome letter included in Appendix B

5.2. Non-renewing Members

Members that have been identified by the DEP as not renewing will be contacted by the Membership and Recruitment Director preferably in the month the non-renewal is first reported. The purpose of the contact is to determine if there's been a communication breakdown between PMI and the member regarding membership renewal and if so, rectify. The contact is also to gain feedback from the member on reasons for non-renewal and identifying areas where the member thinks PMI service could be improved. The Membership and Recruitment Director is to provide updates to the Board regularly on feedback from these discussions.

5.3. Renewing Members

These are existing members who have renewed their Chapter membership. These people should be thanked – let them know it is noticed that they are a member.

Refer to the template renewal email in Appendix B.

5.4. Prospective Members

The Membership and Recruitment Director will maintain a stock of membership packs comprising membership application forms, Chapter flyer and PMI information brochures. The membership packs are to be mailed to prospective members and displayed in a prominent place at all Chapter events.

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APPENDIX A - GLOSSARY OF TERMS

Term	Definition
APC	Australian PMI Council A body comprising the Presidents of each Australian PMI Chapter.
Component	PMI has three types of component: <ul style="list-style-type: none">• Chapters, which are geographically bound;• SIGS, Special Interest Groups not geographically bound; and,• Colleges, for research in specific areas.
DEP	Data Exchange Program A program available for download by Board Members from the PMI component leadership website. The program is updated monthly and contains all current Chapter Members with reports detailing monthly movements.
Hardship Members	Chapter Members of good standing that are unemployed can apply to PMI HQ for a waiving of membership dues. PMI HQ at their discretion will waive PMI and dues for one Component for a maximum of two years. Component dues will only be waived if they were a member of the component at the time of requesting hardship.
PDU	Professional Development Unit. PMPs earn PDUs for attendance or involvement in professional events. 60 PDUs are required in a three year period to maintain the PMP qualification.
PMP	Project Management Professional If you do not know what this is, you should not be reading this manual.
Region 10	Region 10 of PMI consist of South East Asia, Australia and New Zealand
Regional Mentor	The Regional Mentor is a voluntary position elected by the Presidents of the region. The Regional Mentor provides advice and assistance to the Chapter Presidents and is the primary avenue for contact to PMI HQ.

APPENDIX B – CALENDAR OF EVENTS

January		Strategic Planning No Chapter Meeting
February		Annual Chapter Charter Renewal due February 1
March		
April		
May		
June		
July		PMI Insurance renewals published. Premiums due. Board selects Nomination Committee.
August		Call for Board Nominations
September		Nominations close September 20
October		Annual General Meeting and elections
November		First Board Meeting of incoming board
December	Early	Strategic Planning

APPENDIX C – FORMS AND TEMPLATES

The Secretary is responsible for maintaining the library of templates for distribution to Board members as requested.

Templates available includes the following:

- New Chapter Member Welcome letter
- Renewing Chapter Member Thank You email
- Chapter Meeting Guest Speaker Confirmation
- Chapter Meeting Guest Speaker Thank You
- Expense Claim Form
- Invoice
- Non-Disclosure Form
- Board Member Monthly Report
- Board Nomination Form
- Election Ballot Form
- Non-Disclosure Agreement
- PMI Invoice
- PMI Web Change Request