

PMIAK CHAPTER VOLUNTEER HANDBOOK

By

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## **Abstract**

Volunteers are the foundation and strength of Project Management Institute Alaska Chapter (PMIAK). To ensure continued growth and future success of the Chapter, proper guidance needed to be developed to recruit, retain, and recognize Chapter volunteers. Volunteering provides chapter members with an opportunity to influence and promote the project management profession, and to contribute to development of the Chapter. The purpose of this project was to create a PMIAK Chapter Volunteer Handbook with efficient processes to assist leadership engaging with volunteers. The Volunteer Handbook provides Chapter leadership with information related to recruitment, retention and recognition with step-by-step guidance for using a Volunteer Relationship Management System (VRMS). Research for development of the handbook included a literature review, best practices of Volunteer Handbooks from other Chapters, and surveys and interviews with PMIAK Chapter leadership and active volunteers.

### **Key Words:**

Volunteer Handbook, Volunteer Guide, Volunteer Engagement Toolkit, Volunteer Management Guide, Volunteer Package, and Volunteer Relationship Management System

## **Introduction**

### **Project Description**

This project created a PMI AK Chapter Volunteer Handbook with efficient processes to assist leadership engaging with volunteers. Having a well-written guide or handbook for volunteers is critical for a chapter to recruit, retain, and recognize volunteers. There was no existing guide or handbook for the PMI AK Chapter. A Volunteer Handbook is an effective tool to help PMI AK Chapter leaders in the role of organizing, recruiting and leading other volunteers. Research interaction with other PMI Chapters emphasized the important to have a guide that any leader and officer of the Chapter can use as the basis to promote local engagement. This project consisted of planning, gathering research material, creating a PMI AK Chapter Volunteer Handbook, closing out project, developing lessons learned, and delivering the Volunteer Handbook to the PMI AK Chapter. Project started January 2018 and completed November 2018. The project was completely accomplished as volunteer effort; were no cost incurred. The final product outcome is PMI AK Chapter Volunteer Handbook in document format saved in digital form to facilitate Chapter leaders' access.

### **Project objectives**

- Create a PMI AK Chapter Volunteer Handbook using best practices from other PMI Chapters
- Provide a handbook covering volunteer recruitment, retention and recognition, and step-by-step guidance for using a VRMS
- Promote Project Management profession and Chapter development

### **Project Background**

PMI AK Chapter is a non-profit organization founded in 1986, with a current membership of over 500. The Chapter provides a forum for Professional Project Managers to promote the principles of the Project Management Institute (PMI). Volunteers are the foundation and strength of a PMI AK Chapter. Currently, 10 Board Members are actively volunteering in the Chapter. To ensure the continued growth and future success of the Chapter, proper guidance needed to be developed to recruit, retain, and recognize the Chapter volunteers. Volunteering provides chapter members with an opportunity to influence and promote the project management profession, and to contribute to the development of the Chapter. Although the number of members is high, the Board Members observe their volunteer numbers are quite low, and they have been steadily decreasing. In addition, they are quite disconnected from the volunteers.

## **Research Methods and Approach**

Using appropriate research methods to define the content and structure of the Volunteer Handbook was fundamental to creating an effective PMIAK Chapter Volunteer Handbook. The following three research methods were applied to development of handbook.

### **Literature Review**

A literature review was conducted to understand the typical content and structure of a volunteer handbook. A number of online materials related to volunteering and several handbooks written by other PMI Chapters were reviewed to determine the content and structure of Volunteer Handbook. Reviewing volunteer handbooks from other Chapters, it was observed and analyzed that what subjects they addressed in common and what structure they used. Furthermore, the better written ones among them which aligned with stakeholders' requirements and interview observations were selected and used as baseline for writing the PMIAK Chapter Volunteer Handbook.

### **Survey**

Survey questions were developed, reviewed, and sent out to 18 respondents including 10 Board Members of PMIAK and eight active volunteers. Survey was conducted using 10 multiple-choice, ranking-order, yes or no, and open-ended questions. Surveys were not confidential, the response rate of 43% was unusually high, and indicated strong interest in the topic. Intention of the survey was to determine main contents of handbook and to define a focus for interview questions that enabled the interviewer responded interaction to dive deeper and define with greater clarity what contents be the most important and would appropriate inclusion for a final handbook. The survey questions were developed based on the findings from the literature review and the identification of the repetitive themes identified. Limited time for administration of the survey and interviews may have precluded gathering input from additional respondents. Received responses were collected, categorized, prioritized, quantified, and analyzed using preplanned analysis tools.

### **Interview**

Based on the categories identified and their relative importance, as assessed in the survey, interviews were completed with five key interviewees to understand in more detail why these concepts are important. Interview questions were developed based on the data collection of previous survey questions. The structured interviews were conducted with five Board Members of PMIAK Chapter. Similar questions were asked each interviewee in terms of collecting data, but further questions were asked to allow each interviewee to discuss and share their thoughts and personal experiences in their working field after the

structured questions were completed. The further questions allowed the interviewer to determine that what issues the Chapter has been facing and what methods might be used to resolve those issues. Upon signed consent from each interviewee the entire interview was recorded for data analysis, and then deleted. Common needs and interests from respondents were observed to define content and structure of a handbook.

### **Data Analysis**

Data analysis was divided into literature review analysis, survey analysis and interview analysis. Literature analysis was more likely focused on defining the most common sections that were covered by other seven Chapters. Survey and interview analysis particularly focused on determining specific sections for developing the Handbook based on data collection from the survey and interview that were conducted with the Chapter Board Members and active volunteers.

From literature review, seven different handbooks from other Chapters were analyzed based on their common sections. Most common section that was covered by all Chapters was a section of Volunteer Recognition which would likely be included in PMIAK Chapter Handbook. Other followed significant sections were Volunteer Recruitment and Retention, Orientation Training, Volunteer Interview Selection, and Volunteer Satisfaction Survey. These analyzed main sections were discussed by Board members in the survey to determine their importance for PMIAK Chapter and its alignment with stakeholders' requirements to develop the Handbook.

Exhibit 1 shows benchmarking processes based on other seven chapters' handbooks from the literature review. The most common contents that were included in each Chapter's handbook were sections of Introduction and Volunteer Recognition. It followed other important sections on Volunteer Recruitment, Volunteer Management Resources and Volunteer Interview and Selection. Interestingly, Volunteer Opportunities and Volunteer Off-boarding were counted as the least important contents. From this benchmarking, it was observed that the importance for each Chapter varies depending upon uniqueness and needs. However, Recruitment, Retention, and Recognition were consistently used as main sections for all Chapters.



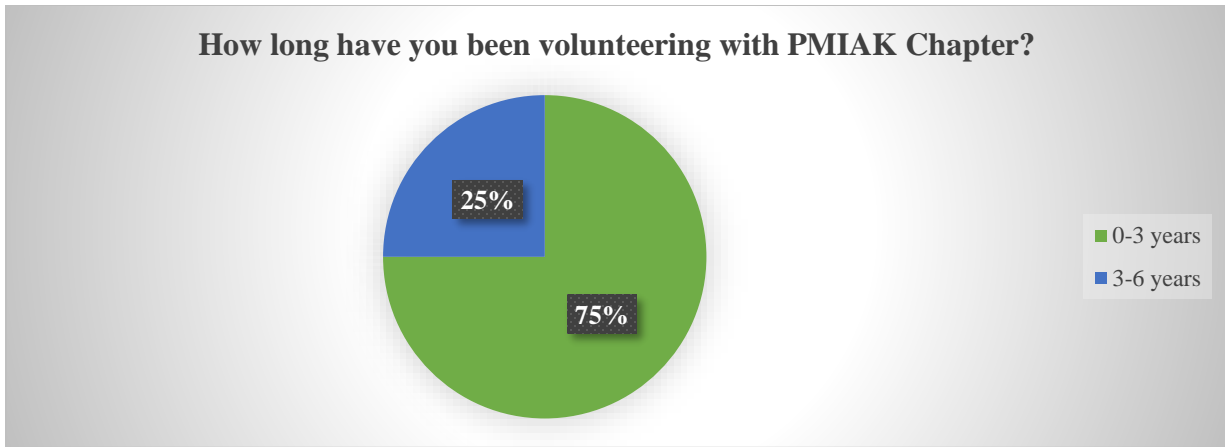
#	Sections of Volunteer Handbook	CHAPTER						Total
		PMI	FWPMI	PMI-SOC	PMIWDC	PMIMLEHI	PMILOOC	
1	Introduction	√	√	√	√	√	√	7
2	Volunteer Recognition	√	√	√	√	√	√	7
3	Chapter Information	√		√	√	√	√	6
4	How to get started	√	√		√	√	√	6
5	Volunteer Recruitment	√	√		√	√	√	6
6	Volunteer Management Resources	√	√	√		√	√	6
7	Volunteer Interview and Selection		√		√	√	√	5
8	Orientation and Training	√	√		√		√	5
9	Vision Statement			√	√	√	√	5
10	Volunteer Satisfaction Survey	√	√	√			√	5
11	Confidentiality Agreement	√			√	√	√	5
12	Volunteer Retention	√	√				√	4
13	Organizational Chart		√	√	√	√		4
14	Professional Development Units (PDU)		√	√	√	√		4
15	Policies	√			√	√		3
16	Volunteer Management Model		√				√	3
17	Volunteer Relationship Management System (VRMS)	√		√	√			3
18	Volunteer onboarding	√	√		√			3
19	Volunteer Opportunities					√	√	2
20	Timesheets				√	√		2
21	Volunteer offboarding		√			√		2
22	Core Values	√		√				2
23	Chapter Office address			√				1

### Exhibit 1: Volunteer Handbook Benchmarking

From survey, data and other information from eight respondents including five Board Members and three active volunteers of PMIAK Chapter, was collected, categorized, prioritized, quantified, and analyzed. Data analysis was a guide to development of a first draft of the Handbook.

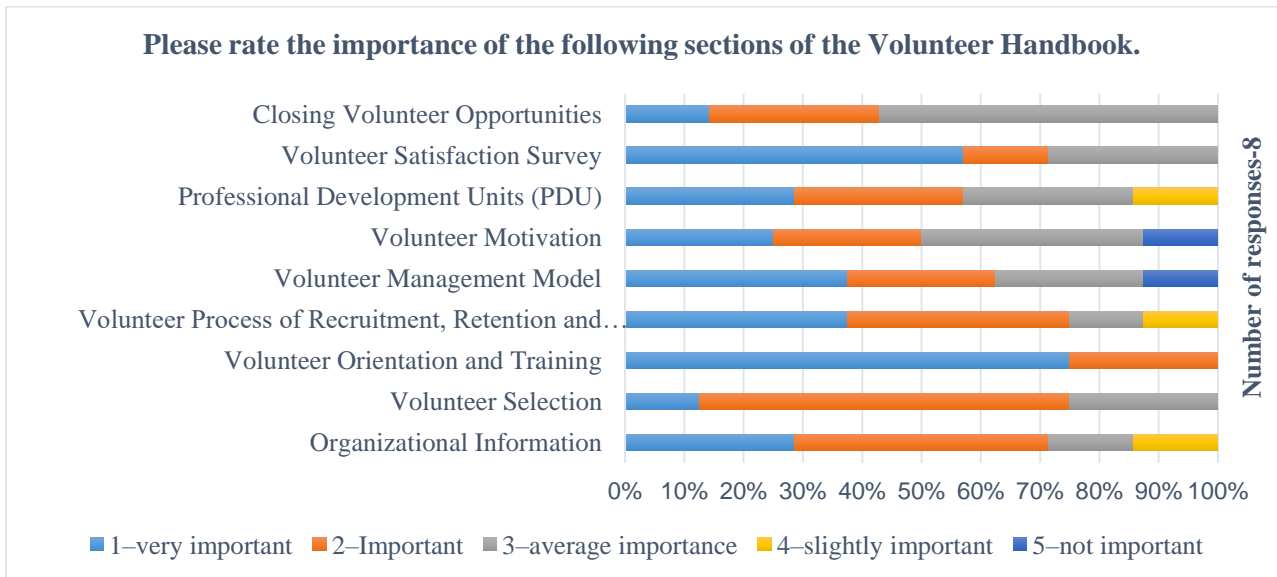
Exhibit 2 depicts the volunteering years of current Board Members in the PMIAK Chapter. A high percentage of Board Members responded that they have been volunteering with the Chapter from zero to three years. It appears that few Board Members are interested in continuing to volunteer within the Chapter. It would be related to a recruitment, retention, and recognition of the Chapter is not sufficiently strong and stable. Therefore, these areas need to be structured and managed accordingly aligned with Chapter's strategic plan.

**How long have you been volunteering with PMIAK Chapter?**



**Exhibits 2: The Volunteering Years of Current Board Members**

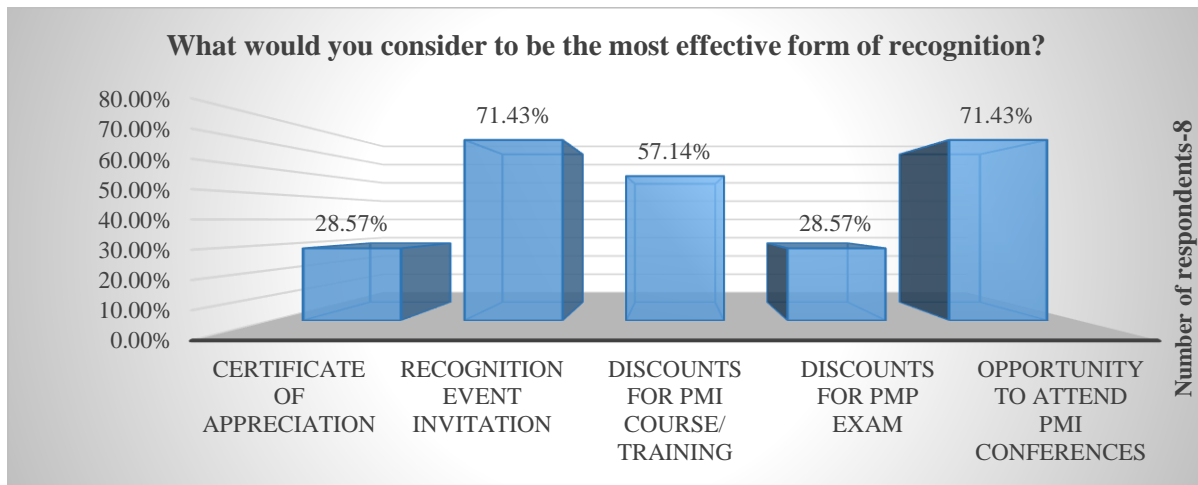
Exhibit 3 shows Closing Volunteer Opportunities and Volunteer Selection are not critical for inclusion in the handbook. In contrast sections of Volunteer Orientation and Training and Volunteer Satisfaction Survey are essential content that is appropriately included in the handbook. Next significant contents are Volunteer Satisfaction Survey, and Volunteer process of Recruitment, Retention, and Recognition that were covered in all seven Chapters’ handbook founded in literature review.



**Exhibit 3: Importance of Content in the Handbook**

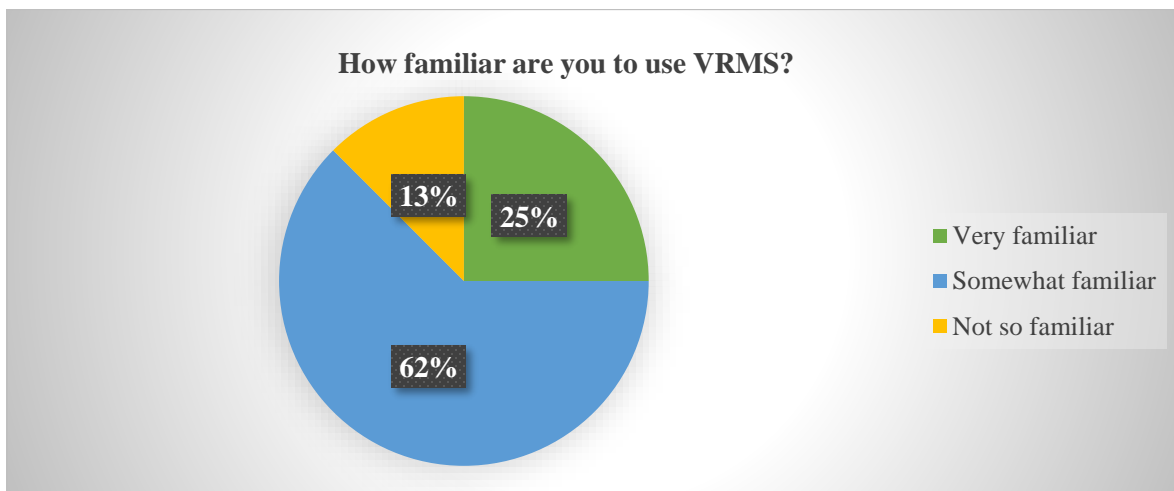
Exhibit 4 depicts a form of recognition where Recognition Event Invitation and Opportunity to Attend PMI Conferences are counted the most effective forms. A recognition was one of the most important sections that each Chapter included in their handbook. It is quite interesting that each Chapter’s recognition forms are different and it shows that volunteers’ expectation of recognition vary depending on which chapter they are volunteering with. These two, the most effective forms, should be key forms of

recognizing volunteers that will be covered in the handbook, and that other recognition forms will be followed.



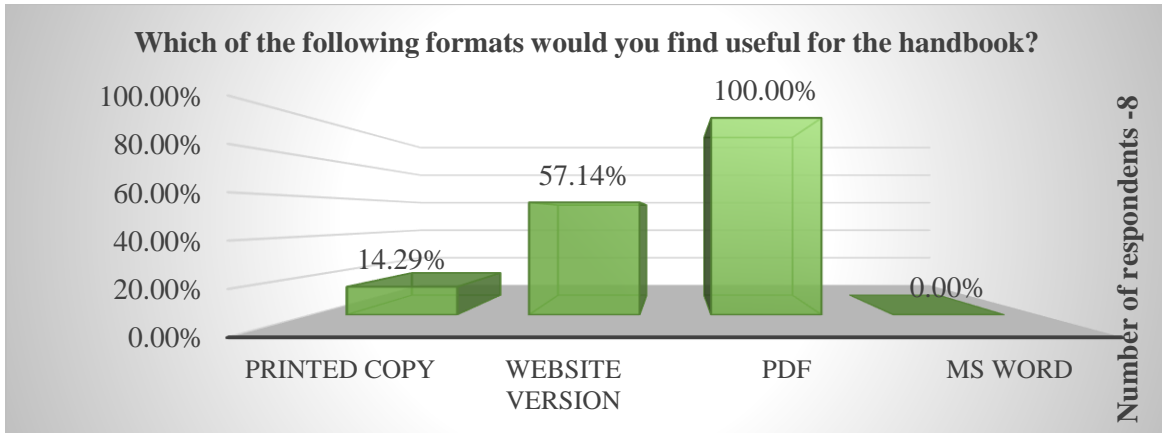
**Exhibit 4: Volunteer Recognition Forms**

Exhibit 5 shows how familiar each of eight respondents were with VRMS when they use it online. 62 percent said somewhat familiar which shows they don't have a deep understanding on how to use it, and need easy and understandable step-by-step guidance on use of VRMS. One of the interviewees said that "Each volunteer is required to use VRMS to apply for any position before they are officially accepted as volunteer in the Chapter. That way we can collect all volunteers' data in one system and that data is fundamental for the Chapter service". Therefore, it is critical for Board Members to understand the processes and learn easy steps to navigate it.



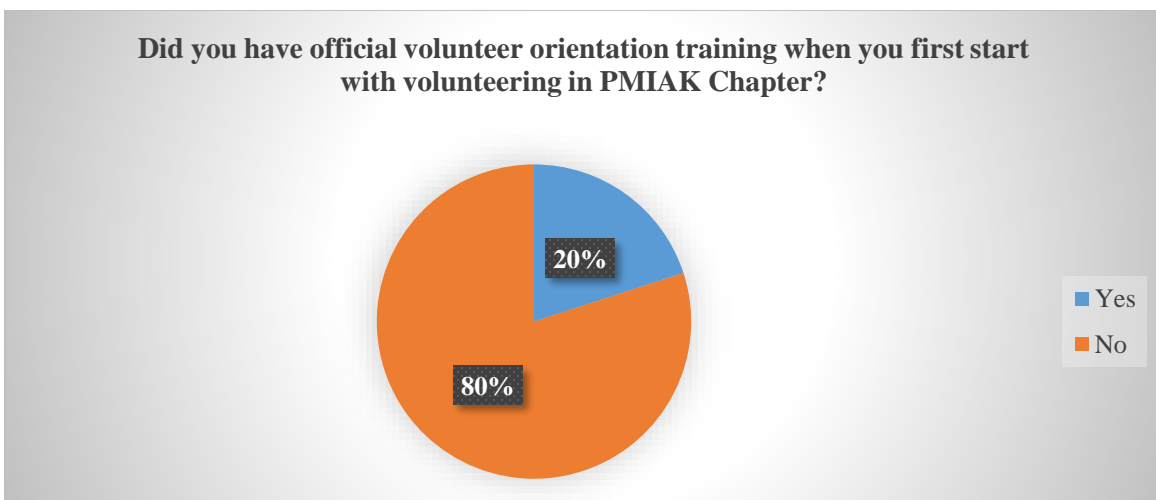
**Exhibit 5: Board Members Familiarization of VRMS**

Exhibit 6 shows the most useful format of Volunteer Handbook that any members of the Chapter can access it and use whenever they need. All eight respondents agreed on PDF format is the most useful format and website version format could be the next available format for volunteers.



**Exhibit 6: Useful Format of Volunteer Handbook**

In Exhibit 7 demonstrates the small percentage of volunteers who have received an official orientation. The Board Members who interviewed identified this as a significant barrier, one member noted, “For my orientation I only received a single piece of paper from a past vice president”. These findings reinforced the significance of an orientation and training, which was highlighted in the earlier survey and literature review. This was critical in shaping the structure of the handbook, as it was clear that the primary utility of the handbook was going to be in supporting an orientation. In addition, during the interview several Board Members mentioned the need to develop Operational Procedure Policy Manual which is a strategic planning document that addresses duties and roles of Board members and outlines how the organizations activities should be structured. One key interviewer noted, “The Volunteer handbook alone wouldn’t function without the Operational Procedure Policy Manual”.



## **Exhibit 7: Percent of Volunteers Receiving Official Orientation**

### **Handbook Rough Draft**

Before delivering a final Handbook to the PMIAC Chapter, two rough drafts of Handbook were produced and sent to Board Members for a review. The intention of first draft was to ensure it covers all stakeholders' requirements and expectations and get feedback from Board Members on how to improve it for the next draft.

The first draft was provided to Board Members to review and give feedback. Two responses were replied on time along with their feedback for next handbook improvement, but reviewing days were extended to gain input from additional respondents as a means of resolving conflict with competing time requirements. In total 3 responses were received from the first draft, the main focus of the responses was highlighting the importance of VRMS. This tool was thought to foster greater communication through clearly documented details regarding the volunteer role and linking their application more clearly with the activities of the Chapter. This tool and its usage became an essential first step for volunteers to apply for positions if they are interested in volunteering within the Chapter. The structure of the Handbook most likely remained the same.

The second draft was developed based on three Board Members' feedback and comments for the first draft. It was sent to Board Members two weeks after the first draft. A short amount of time was given to Board Members to review and give feedback. In total 3 responses were received from the second draft and there was some recommendations and comments on a handbook formatting and an organizational chart. Those recommendations were applied in a final product.

### **Research Result**

From the literature review, it was clear there were a few consistent sections that would be expected to be found in a handbook. The most frequently identified nine content areas became a focus for the interviews. The intent was that analysis of the Board Members group would facilitate tailoring this handbook to the specific context of the PMIAC Chapter.

As the surveys were completed, and the results analyzed, it was apparent there would be limitations, as the demographics for the respondents were as expected. Since the surveys were not confidential, a response rate of 80% was expected, but the results were well below that rate. However, the group identified for the survey, Board Members and active volunteers had less time than expected. Despite this, the results identified core areas of focus for the handbook, with an emphasis on recruitment, retention, recognition,

orientation and training, assessment of satisfaction of volunteers. These results guided the development of the handbook and assured that the Handbook reflects the needs of the stakeholders.

The final step in the research was to explore the justification and identify the concepts considered essential to the content areas. This was completed through key interviewees and identified concepts for use in developing the body of the handbook. Ideas on how to more successfully roll out the handbook, the format and when it would be advertised, were concepts also brought forward in the interviews. During the interviews with Board Members, it was identified that the Handbook alone would be incomplete without a document of Operational Procedure and Policy Manual. The Operational Procedure and Policy Manual is the next key document that needs to be produced to assist Board Members to know their roles and responsibilities, and daily tasks relate to their position.

Finally, as this research was so dependent on access to key members of the group, and this group had a fairly small denominator, it was key that trust, engagement, and multiple opportunities for feedback be maintained in order to assure the fidelity of the approach. The research was coming in behind schedule due to unexpected risks. This limited the Project Manager's ability to focus on increasing the number of participants, as it might potentially lead to inconsistent involvement across study participants. A stepwise approach was taken to assure all information from an earlier methodology was reviewed before using that data to inform the next method.

### **Selected Knowledge Areas Application and Metrics**

The following three knowledge areas were selected and focused during project execution and closing stages: Project Scope Management, Project Communication Management, and Project Time Management which were essential to the project success and final product.

#### **Project Scope Management**

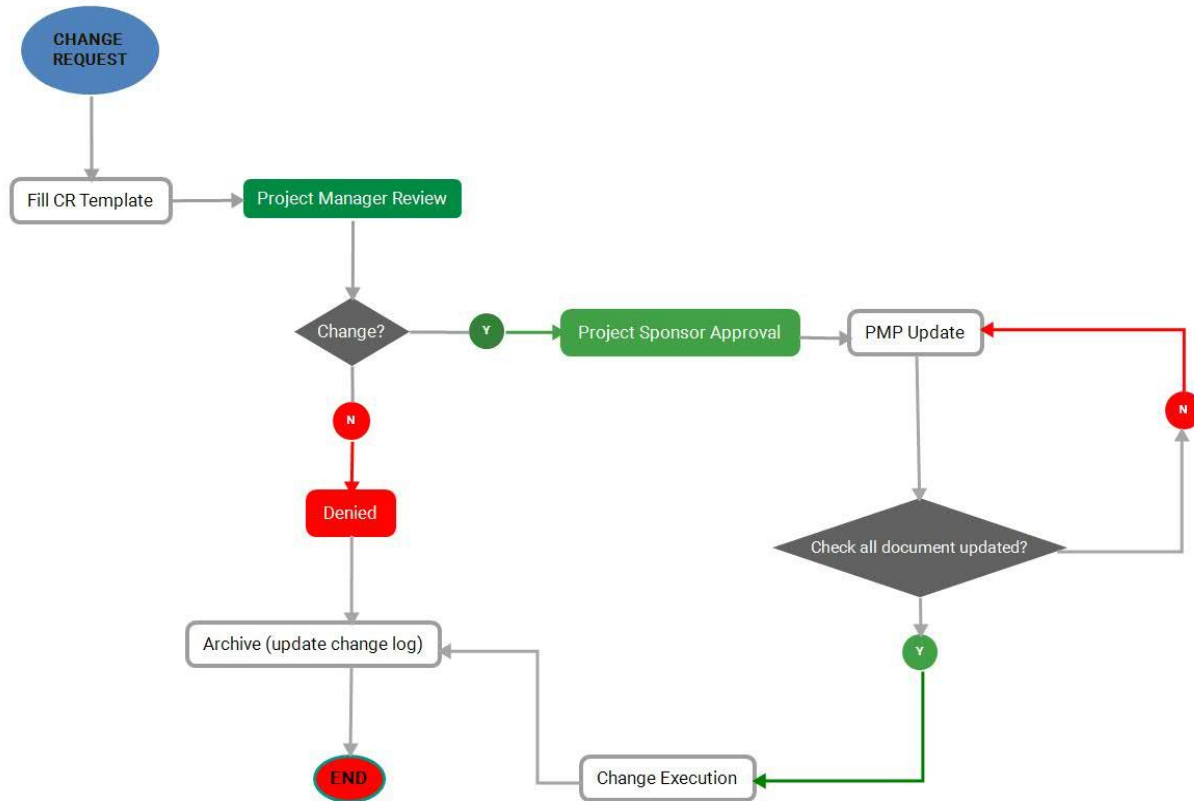
Project Scope Management Plan was developed, monitored and controlled to meet stakeholder needs and final product outcome. A Requirement Traceability Matrix is an essential document to track stakeholders' requirements and ensure that all requirements are delivered at the end of the project. During the project execution it was identified that some tasks of research work pushed project behind schedule due to unexpected risk. Change was requested, logged in Change Log Register, and monitored accordance with Change Control Flow Chart. Upon approval, PMP and other related documents were updated.

Exhibit 7 shows metrics of how change was logged in Change Log Register.

Change Log Register													
Project Name:		PMPK Chapter											
Project Manager Name:		Badam Baatarbileg											
Project Description:		0											
ID	Current Status	Priority	Change Request Description	Assigned To Owner	Expected Resolution Date	Escalation Required (Y/N)?	Action Steps	Impact Summary	Change Request Type	Date Identified	Entered By	Actual Resolution Date	Final Resolution & Rationale
1	Work In Progress	High	Tasks of research work are behind schedule.	PM	09/18/18	No	Adjust duration of impacted tasks and work on those task over the weekends to catch up next tasks.	There is no budget for this project so main impacted parts will be project schedules and resources.	Project	09/10/18	PM	09/18/18	Updated schedule reviewed and approved

**Exhibit 7: Change Log Register**

Exhibit 8 shows the processes of how change was requested, logged, and denied or approved, and executed during the project execution phase.



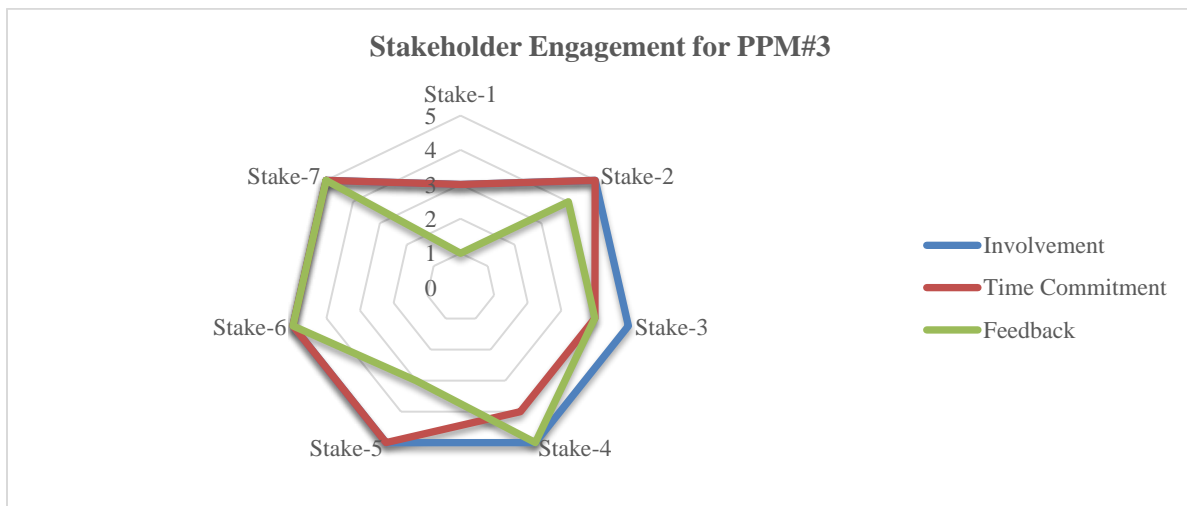
**Exhibit 8: Change Control Flow Chart**

### Project Communication Management

The Project Communication Management Plan was developed and managed throughout the project execution and closing stages. The stakeholder register was critical document to enable an efficient communication between project stakeholders and to document their requirements and needs. Effective stakeholder engagement was important to this project outcome; it was measured by their feedback,

involvement and time commitment. Stakeholders' feedback, involvement and time commitment for each meeting were scored based on effective engagement, meeting expectations and providing information. Stakeholders were mostly engaged via email and face-to-face meeting which were the best communication methods for the Project Manager to understand and interact them well due to language barrier. During the project execution, the stakeholders were engaged in terms of taking surveys, participating in interviews and providing feedback for draft handbooks.

Exhibit 9 depicts stakeholder engagement assessment based on biweekly meetings with them.



**Exhibit 9: Stakeholder Engagement**

Involvement was measured by stakeholder engagement with the Project Manager for each meeting. The highest score was five points and the lowest one point.

Time Commitment was measured by availability of stakeholders to meet and the difference in the planned meeting hour vs actual meeting hour. The highest score of time commitment was five points and the lowest one point.

Feedback from stakeholders was measured by Project Manager's expectations for each meeting. The highest score was five points and the lowest one point.

### **Project Time Management**

The Project Time Management Plan was developed and controlled by using Microsoft Project. For this project, time was a constraint, therefore, keeping track identified risks which might or could occur during the project execution and monitoring risk analysis to reduce their impact on the project was critical. When the project was being executed unidentified risks related to research work occurred and it pushed project time behind schedule. To keep track project time avoiding any delay, a change was requested, and



duration of impacted tasks by these risks were adjusted, and a regular work time of Project Manager was extended to catch up delayed tasks. The project schedule was updated before each PPM submission to avoid schedule creep.

### Project Risk Management

For this project, time was a constraint. The approach for managing risks included a methodical process by which the project manager identified, scored, and ranked the various risks in Risk Register document. Every effort was made to proactively identify risks ahead of time in order to implement a mitigation strategy from the project’s onset. When unidentified risks related to research work occurred, tasks took longer time than planned and it caused project time negatively. One of the unidentified risks was that number of survey participants was lower than expected which could have impacted a quality of the final product. To increase number of survey participants the survey response timeframe was extended. Due to this delay, the project manager needed to work additional hours to offset delays in starting tasks impacted by this risk.

Following four main steps of project risk were taken during project execution and closing stages:

Risk Identification- determining which risk may affect the project.

Risk Analysis- assessing to identify the range of possible project outcomes.

Risk Responses- developing tools and techniques to enhance opportunities and reduce threats to project tasks. The approaches of avoidance, mitigation, acceptance and transferring were selected to minimize major risks’ impact to project schedule.

Risk Monitoring and Controlling- tracking level of risk on a project, monitoring and reporting them throughout the project lifecycle.

Exhibit 10 shows how risks were identified, analyzed, responded and controlled in Risk Log document during project execution and closing stage.

Risk Log									
Project Name:		PMIAK Chapter Volunteer Handbook							
Project Manager Name:		Badam Baatarbileg							
RISK IDENTIFICATION			RISK ANALYSIS			RISK PLANNING		MONITORING & CONTROLLING	
ID	Risk Description	Risk Categories	Probability	Impact	REN=Probx Impact	Response Plan	Owner	Current Status/ Progress	
9/15/2018	Project Schedule	Schedule	5	1	5	Mitigate: Adjust impacted tasks' schedule	PM	Completed	
10/12/2018	Lower number of survey participants	Quality	5	1	5	Accept	PM	Completed	

Exhibit 10: Risk Log

## **Conclusion**

The process for developing a volunteer handbook was a strong demonstration of the challenges in project management. Too often, the over reliance on key participants can delay projects or lead to poor results. However, in this case the process was robust and involved multiple methodologies, as well as process evaluation to assure the project ended with a generalizable output. The findings from the literature review provided a strong starting point, with several core areas identified. No new concepts were introduced when these themes were taken back to the survey participants and key interviewees. This prevented further delay and moved the project forward. When the project is being executed the potential delays were identified and decision was made. For example, the decision to move forward the interview with lower than expected survey participation was critical to maintain the high level of engagement that was so critical to this project's completion.

Based on the identification and prioritization of core concepts aligned with key stakeholders' requirements the contents and the structure of the Handbook were produced to walk a new volunteer through the Orientation process. It began with getting them thinking about recruitment and retention, moved on to introduce the Orientation structure, and at that point began to describe how they are onboarded, the volunteer recognition process, and finishes with the Volunteer Satisfaction Survey before introducing the essential tools. In addition, the awareness of the lack of knowledge in utilization of the VRMS program was a key finding for leadership. This will encourage training for this program be integrated in the rollout of the handbook.

One of the keys to the success of this project has been the fact that so many of the ideas and solutions developed were crosscutting, with the potential to impact the organization as whole. A focus on these areas led to continued involvement and demonstrated the value of the project. Though not anticipated, this was key to successful completion, as well as being key to how the handbook is adopted into the organizations culture. One of the principal goals of this project was to increase communication and enhance recruitment of volunteers. This research for this handbook demonstrated the potential that regular surveys and facilitating volunteer's participation in meetings has for enhancing communication between Board Members and the volunteers. With continued communication, and opportunities for recognition, the chances for increasing volunteer numbers is high.

## **Recommendations for Further Research**

A recommendation for further research would be to increase the number of key stakeholders who could be involved in surveys and interviews to enhance its quality and comprehensiveness. The limited number of stakeholders could affect the development of the handbook and furthermore it could

impact the quality of the final product. Other recommendations would be to create a Stakeholder Register document in detail to improve engagement with key stakeholders, understanding their expectations, and monitor those expectations throughout the project lifecycle. Stakeholder Circle Methodology by Lynda Bourne that focuses on identifying all stakeholders, prioritizing their needs, engaging them in effective ways, and monitoring their needs would be a proposed tool to develop the Stakeholder Register in more detail and its continuous review. The last recommendation would be to know organizational culture and align projects with strategic goals of PMIAK. Every organization has a different culture and strategic plan, so knowing its culture will be crucial to project success.

## **Acknowledgement**

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## Glossary

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**Appendix A**



PMIAK Volunteer  
Handbook final .pdf