Implementation Cook Book
Version 1

“Serving those who have Served”
-Kendall Lott, CEO, PMI Washington DC Chapter

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Cook Book Contents:

Intro

Value of the Military Liaison Position

Chapter Military Liaison (Vision)
  - Objective
  - Background
  - Solution
  - Justification
  - Pilot
  - Introductory Activities
  - Way Ahead

PMI Chapter Military Liaison Volunteer (Position Description)
  - Eligibility
  - Summary of duties
  - Annual Budget
  - Essential Job Functions
  - Qualifications
  - Benefits

Implementation Path

LinkedIn

Success ‘Recipes’

Contact Information

Parting Thoughts
Introduction:

The Military Liaison is an essential voluntary position for every PMI Chapter that has a collocated military base in the local metropolitan area. It is also very beneficial for those chapters that have military veteran population. The benefits of this position for the chapter, military personnel, veterans and the local community are presented in this brief implementation cookbook. It is our hope that your chapter will adopt this volunteer position locally and that you will advocate for a national level position to orchestrate future implementations nationwide.

This is a living document. Every PMI chapter will have a slightly different perspective on the Military Liaison, on how to interpret “Serving those who have served.” We are gathering great insight to what chapters will take on to be successful, from training, scholarships, enhanced prep classes, certification transitions, application assistance, mentoring, military outreach...and the list continues to grow. We encourage those that have lessons learned to share those with us. Our contact information is at the end. Through our shared experiences and knowledge, we raise the profile of this position to the National and Global level it deserves within PMI. We will improve and share this knowledge through various channels as this position is successfully realized through out PMI.

Note * Success ‘recipes’ @ PMI Military Liaison LinkedIn Group site

Valuable information is provided through the presentations and other documents that we ‘hang’ off the PMI Military LinkedIn group site. For those seeking ‘success recipes’, we encourage you to seek out detail and derive the answers you need from the slide decks. Feel free to modify and use as you see fit to meet the needs of your chapter and goals of your Military Liaison.
Value of the Military Liaison Position

The Military Liaison provides not only value to your chapter, but also to the veteran in transition. A short list of these essential value multipliers is presented below.

1. Increased certification of members, through training, education and mentorship.
2. Increased general membership for your local chapter.
3. Opportunity to tap into trained leaders from the military. Tapping into these trained leaders will help PMI’s desire to increase the community of servant leaders.
4. Provide networking and educational opportunities for local veterans and active duty personnel interesting in transitioning into Project Management.
5. Increase cross-communication between organizational and practitioner markets through:
   a. Local community companies interested in supporting the successful transition of veterans
   b. Increasing awareness and contribute to community outreach of your PMI chapter.
Chapter Military Liaison (Vision)

Objective:

Develop requirements for a Project Management Institute (PMI) Chapter Military Liaison.

Background:

There are over 60+ military bases located adjacent to or near a major metropolitan area that has an established PMI chapter within the United States alone. These bases all have need for education, training, certification assistance and networking from the local PMI Chapter. In turn, by providing a contribution to the networking and the education of the service member, civil servant and local contractors, local chapters would potentially benefit through membership growth, and increasing the number of certified professionals. Further, in addition to enhancing the community wellbeing, growth, understanding of PMI along and increased notoriety would all be natural extensions of such an endeavor.

Solution:

Establish a Military Liaison position at each chapter that has a co-located military base or a volume of veteran members. Volunteer Position to work jointly with the PMI Government Relations Manager and other chapter Military Liaisons.

Justification:

The military liaison at co-located military bases and PMI chapters will allow for both collaboration and advancement of the project management community and offer deeper alignment to the PMBOK and potential increase in certifications. With the military's ever increasing understanding of the value of the project management profession, the number of military, contract and civil servant serving in the career field is rapidly increasing. With the PMI's desire to advocate the profession and the military hiring more project management professionals, it is a natural combination for growth, development and education of government and military project managers.

An example of the capability that PMI could provide within this type of civil-military community is the assistance of transitioning military personnel. In addition to the annual churn of military personnel departing the service, a recent reduction in force (RIF) has taken place in 2014 and will continue over the next 5 years. Over 1400 mid-grade officers are being forced to leave the service. In addition to the annual release of well over 120,000 personnel, the quick establishment of this position may enable PMI to exemplify excellence in a potential career field available to transitioning military personnel as they depart the service. This is a lucrative target for PMIs educational instruction.

Pilot:

Tampa Bay has incorporated and piloting this position with MacDill Air Force Base (AFB) in the form of a Military Liaison. Tampa Bay chose an individual who is a retired Army Lieutenant Colonel, member of PMI, is a PMP, and is currently the director of a Project Management Organization (PMO) at MacDill AFB. His volunteer position serves under the VP - Strategic Projects, Tampa Bay PMI Chapter.
Introductory Activities:

Activities developed by this position include, but are not limited to the following:

- Lunch and Learn activities to bring education and understanding to the base military. The tenants of this effort are to teach military about Project Management skills that they already possess, increase their knowledge of the Project management career field, provide information on PMI certifications, provide information on the benefits gained from local Chapter membership, and gain an understanding of how to prepare for their military transition.

- Chapter discounts offered to active military (currently). Several discounts are offered for a series of events, which include dinner meetings, symposiums, Professional Development Days (PDD), scholarships, and chapter training. It is anticipated that discounts would be extended to active Civil Service and DoD Contractors.

- Provide general information at quarterly career and education fairs at local military base.

- Invitations/communication to attend networking sessions held at the local chapter.

- Invitations/communication to attend pre-chapter meeting sessions (those who are members can receive a PDU, then go to the regularly scheduled dinner meeting), where further discussions are presented on:
  - Awareness
    - Transition experience (have a panel of military and others who have ‘transitioned’ from one industry to another and speak to the ‘transition challenges/success’)
    - Military transition assessments
    - Interviewing tips & branding
    - Military/commercial terminology and projects are shared
    - Mentoring/protégé (if available)
  - Knowledge
    - Gain insight and knowledge to current job outlooks and salaries
    - Gain insight and knowledge to current area and US based industries increasing Project Management
    - Insight to local community and global organizations working with PMI in support of veteran training/hiring
  - Learn
    - Certification benefits
    - Certification application processing
    - Use of GI Bill prior to transitioning out of Military
    - Differences and value between PMI Certifications vs. DAU (Defense Acquisition University) Project/Program certifications and FAC-PM/PgM certifications which focus on acquisition and procurement knowledge

Other ideas are formulating and will be updated as this document and program matures; example includes formulation of a mentor/protégé program for transitioning military through the Liaison position. This group is built based upon capturing mentors from the local chapter who have or currently transitioning in commercial project management. Once expectations are captured and finalized for the mentor, then we
will offer to military transitioning personnel to sign up and be protégé’s. Activities in this group will include, but not be limited to, the following:

- Resume tips
- Networking
- Common chats on service and experiential translation
- Assistance in converting military ‘projectized’ experience for CAPM/PMP credential applications
- Community hiring awareness

**Way Ahead:**

Planning is key to the successful creation for the new organizational position of Military Liaison. First step is to seek a chapter member who wants to volunteer and has ties to the local base. Several benefits can be obtained as the maturity of the position increases, such as:

- Standardizing this position and the essential duties among the qualifying chapters will provide the foundational method to move forward. A recommended description of duties is included with this document to provide such a baseline. It is imperative to pull from best-practices and previous experience to correctly architect this position to meet expectations and requirements.
- Sharing of success stories and a U.S. based mentoring network in support of the military through PMI.org.
- Measurement and KPIs associated with military personnel transitioned into Project Management, credentialing achieved, measurements of pre- and post- military liaison efforts, and PMI membership due to Military Liaison outreach is essential. These results can be fed back up to Global PMI for alignment and justification of services to practitioner and organizational markets strategies.

In summary, the following steps are essential to the success of this effort:

- Developing a Military Liaison Charter with expectation and goals to gain PMI Global advocacy and endorsement.
- Establishing a national volunteer position for the planning and co-ordination of this effort.
- Standardized documentation and duties of the Military Liaison position, receiving concurrence from the executive council.
- Understanding and gathering information on existing co-located military bases and chapters
- Make a determination of the existence of a Military Liaison position within each of co-located chapters.
- If position exists, work to standardize the duties and responsibilities of each position, advocating PMI standardized duties and responsibilities.
- If the position does not exist, coordinate and advocate at each chapter the value and importance of establishing the military liaison position.
- Utilize the national volunteer position in the initial establishment of this critical position and to provide future co-ordination and tracking of the local chapter Military Liaison Officers
This Military Liaison position at the local level will prove invaluable to PMI chapters with military members/co-located military communities. A key to success will be to identify a Military Liaison who understands both the military and PMIs mission and core values of impact, professionalism, volunteerism, community, and engagement.

Presented to Rene Campos (PMI Government Relationship Manager) by Jay Hicks and Sandy Hoath Cobb, Tampa Bay Chapter members, July 2014.
**PMI Chapter Military Liaison Volunteer (Position Description)**

**Position:** Military Liaison

**Position level:** Director

**Reports to:** Special Projects VP or other Community affairs VP of a PMI Local Chapter

**Purpose:** The purpose of the Military Liaison is to serve as a liaison between local chapter members and resources of the local chapter of PMI and local base or regional military membership geographically located to the chapter. The Military Liaison is responsible for promoting membership benefits of the PMI chapter to the local members of the military base or other military organization. The Military Liaison will act as a guide and bridge to military personnel interested in PMI for Q&A, membership benefits/discounts, as well as certification support, networking and career connectivity.

Vision of the Military Liaison is to pilot first within the Tampa Bay PMI Chapter for one year. Review membership interest and reaction of military. If positive, organize white paper and promote upward for all other U.S. based chapters to consider through Region 14 towards Global channels.

**Summary of duties of the Military Liaison:**

1. The Military Liaison reports directly to the VP Professional Services, Special Projects, or other current VP voting member position within the local chapter.
2. The Military Liaison may be one or more person as designated by the Executive Board.
3. No voting power is granted to the Military Liaison Director position.
4. The Military Liaison position will assist the existing local Board with any tasks associated with extending and socializing PMI benefits and features to the local military community that is interested in transitioning into the field of Project Management
5. Each member of the Military Liaison will need to sign the Conflict of Interest Forms.
6. The Military Liaison will have access to the Component Leadership site but will not have access to the DEP.
7. The Military Liaison will earn PDUs under the same guidelines as any other committee member.

**Annual Budget for the Military Liaison:**

It is expected that the annual budget for the Military Liaison will be in accordance and sizable to the interest of the PMI chapter and that of the interest from the local military groups/base. Items to be covered under this budget (unless determined to be covered under the President’s budget) include the following items (and others as determined needed): Business Cards, Name Tags, marketing materials, meeting meal fees, and any meeting costs that may be required (room costs, etc).

**Business Cards, Names Tags, and other items for the Military Liaison:**

**Business Cards** – The Chapter Business Card format will be used in accordance with local chapter criteria using the title “Military Liaison”. No other Title will be printed on these cards.
Name Tag – The standard Chapter format will be used with the Title “Military Liaison”

Suggested / Recommended first Military Liaison of the PMI Chapter:

Essential Job Functions:

- Under guidance of the local PMI chapter Membership Manager, assists to track new, renewing and non-renewing (military) members.
- Enhances efforts to maximize new memberships and renewals including membership drives and on-site military brown bag luncheons or meetings.
- Provides local chapter announcement of new military memberships at meetings.
- Provides local chapter marketing assistance to:
  - Create and circulate a “new member packet” with information about local chapter community involvement, military discounts and benefits, as well as introducing the local Chapter PMI Board.
  - Creates display boards for conferences promoting the Region.
  - Establishes relationships with local community organizations in support of hiring/training military in transition.
- Familiarity of the Association’s website and membership rates and benefits.
- Attends minimum 4-6 chapter meetings; available for annual Strategic Planning sessions.
- Pending fiscal and budgetary resources, stands a booth at local Symposium and special chapter networking events.
- Writes contributions for marking/newsletter/website.
- Contributor to National/Global Military Liaison to assist in knowledge sharing, and lessons learned.

Time Commitment
- Member Services Coordinator is a 1-year term, renewable voluntarily with approval in accordance with local chapter bylaws.
- 4-6 hours / month

Qualifications
- Active, Retired or honorable discharge from U.S. military
- Certified PMP or CAPM
- Active member of PMI and Local Chapter in good standing
- Good organizational and written/verbal skills
- Marketing knowledge could be helpful
- Computer, internet and email access essential
- Ability to work with others to achieve consensus

Benefits
- Professional and social networking
- Learn or develop new skills
- Share your skills and talent
- Motivation and sense of achievement
• PDUs (per volunteer guidelines)
• Gain work experience
• Enhance your resume
• Build self-esteem and self-confidence
• Make an impact in the field of military transitions into Commercial work
• Sharpen leadership skills
• Support something in which you believe
Implementation Path

Understanding that there are a number of chapters that have programs or efforts at various levels of maturity that provide services to veterans for training, scholarship and prep classes (among other benefits), the implementation and success of this position may vary considerably by chapter. However, a basic road map for approval and maturation of the position is presented below.

1. Board Approval (slide deck for your usage and modification is available at the LinkedIn Group PMI Military Liaison)
2. Military Liaison develops “Lunch and Learn” Program at the local military base. Slides present the capabilities of PMI, the benefits of PMP and CAPM Certification and why military service members make good project managers (slide deck for your usage and modification is available at the LinkedIn Group PMI Military Liaison). Purpose: seek awareness and interest at base.
3. Military Liaison invites “Lunch and Learn” attendees to Chapter Pre-Meeting... specifically geared for transitioning Military Project Managers (slide deck for your usage and modification is available at the LinkedIn Group PMI Military Liaison). Purpose: seek awareness and interest at chapter level.
4. Attend local military base job and education fairs on behalf of PMI and local chapter. Invite attendees to future “Lunch and Learn” and Local Chapter Meetings.
5. Conduct local meetings through: PMI, Organizations, and Community functions offering awareness, transition success, etc.
6. Attend chapter strategy sessions developing creative, locally tailored military liaison program to increase outreach to military community and leverage membership growth.
7. Increase Community outreach through relationship development with local organizations supporting transition military to project management.
8. Develop and mature a mentorship program through one on one alignment of military veterans who are certified and those veterans that are seeking certification.
9. Incentivize PMP Certification through Military Liaison Coin Presentation. Coins are available for this use.

....Next great idea!
Join our group: **PMI Military Liaison LinkedIn Group**. It is a request-to-join group dedicated to sharing and exchange of knowledge, ideas and great information to support and develop the PMI Military Liaison volunteer position. Only those that have a true desire and interest towards this goal need to participate - thank you for 'serving those who have served'.

Here you will find the latest and greatest information regarding the Military Liaison cookbook, and Military Liaison Position movement around the country. Use the LinkedIn site to seek questions through discussions and cross-chatter. You will find valuable slides, stories and news that can be found and shared. We look forward to you joining and gaining feedback and stories from you to improve this important and valuable position within your PMI chapter.

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Contact Information

As we build momentum, we are always here to help: our personal contact information is listed below:

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Parting Thoughts:

We wish you and your chapter great success in your implementation of this very important position. Please do not hesitate to contact us as you mature – we know there will always be someone else or another chapter with similar challenges, successes, and lessons....it our goal to share these amongst those interested in making this position a reality. We truly believe that this essential position is a win-win situation for chapters and veterans. Many veterans are looking for their niche and it is essential that they understand this may be a career field in which they are well suited.