

November 2023 Chapter Newsletter

IIL International Project Management Day

Tomorrow, November 2nd!

Information & Registration Below

International Project Management Day 2023!

Thursday, November 2nd, 2023 - Online Conference

You will experience an **inspiring lineup of speakers sharing insights** on artificial intelligence, project management practices, team engagement, achieving team and organizational peak performance, risk management, and the best excel tips.

Plus, you can **earn 26 PDUs, SEUs, and SHRM-PDCs** and get two self-paced courses Kanban:

1. A Beginner's Guide to Getting Started
2. Understanding Lean Fundamentals

This conference streams online until February 5, 2024, so you don't have to be available on the live day to benefit! If you have any questions, please email barry.milhaven@iil.com and help us spread the word to other PMI Willamette Valley Chapter Members!

Register here!

Don't forget to use our code PMIWV to save \$12 . We hope to see you online at IPM Day 2023!

Upcoming events

Thursday November 9, 2023

November Eugene Branch
Meeting

Monday November 13, 2023

PMP EXAM PREP – FALL 2023
PROJECT MANAGEMENT

[Learn more >>](#)

PROFESSIONAL 5 Day Virtual
Bootcamp (Sponsored by PMI
Portland Chapter)

[Learn more >>](#)

Tuesday November 14, 2023

Central Oregon Project
Managers Meeting - November
2023

[Learn more >>](#)

Wednesday November 15, 2023

Salem Branch Meeting

[Learn more >>](#)

Meet the 2024-2025 Leadership Nominees!

Chapter President

Jonathan Love

Chapter Vice President

Krista Cooper

Chapter Vice President, Technology

Conrad Rohleder

Chapter Vice President, Outreach

Art Jones

Travis L. Miller

Chapter Vice President, Finance

Pending - see role description below!

[Click here](#) to view the biographies and qualifications for these candidates.

Chapter VP Nominee Needed - Finance

FINANCE/TREASURER

DESCRIPTION:

Elected volunteer responsible for managing financial operations, maintaining and presenting all financial records required for chapter operations in accordance with chapter bylaws, local legislation* requirements and the PMI Code of Ethics and Professional Conduct.

RESPONSIBILITIES:

- **Manage accounts receivable and payable** and all financial portfolio activities, including but not limited to the collection of chapter dues from PMI, payments for chapter meetings or special events and the payment of all chapter bills in accordance with the chapter board of directors.
- **Establish and maintain all required chapter bank accounts** and/or similar financial transactions; arrange for officer signatures and/or approval as required.
- **Provide financial reporting** regarding the state of financial assets and chapter activity to chapter membership and board of directors.
- **Prepare the annual financial statements**, reports and any other mandatory financial documentation required by local legislation* and liaise with a dedicated financial/tax consultant, if available.
- **Maintain the annual budget**: assist each chapter functional area in creating their respective budgets aligned with the annual plan based upon their desired services/programs for the coming year, tracking and monitoring of expenditures, reporting spending and available funding for each functional area and assisting in procurement services and pricing.
- **Open and close accounts** as deemed necessary for the management of chapter funds with approval from the chapter board of directors.
- **Assist with the annual planning** by providing relevant budget and financial information.
- **Assist with and contribute to the budget planning** and goal setting, investing, and forecasting for the upcoming years, both short term (1 year) and long term (next 2 to 3 years).
- **Track accounting and spending** monthly, annually and by chapter event for accurate record-keeping.
- **Assist chapter president** in completing financial session on charter renewal online form and provide PMI with financial documentation necessary for chapter's annual charter renewal process.
- **Prepare financial guidelines and procedures** for the chapter along with board.
- **Maintain and ensure compliance** with all financial operational processes to ensure continuity of chapter operations and define, document and maintain chapter policies including financial reserve policies, investment policies, and record retention and destruction policies established by the board of directors.
- **Ensure the chapter has reviewed and submitted required tax filings** and/or government required payments.
- When required, **facilitate and collaborate with any auditors** efficiently and with the utmost integrity.
- **Recommend improvements in the financial processes** to the board. Keep an up-to-date inventory of all of the financial and physical assets of the chapter.
- **Serve as liaison with PMI** on financial matters.
- **Complete a cost-benefit analysis of all activities** proposed by the board of directors.
- **Review any chapter contract, agreement and insurance.**
- **Review and reconcile bank accounts** monthly.
- **Develop and implement succession and transition plan** for the role.

**Local legislation might be state, commonwealth, country, or another jurisdiction*

BUSINESS ACUMEN SKILLS:

- Accounting software/tools (e.g., QuickBooks, Excel)
- Knowledge of financial planning
- Analytical thinking
- Knowledge of generally accepted accounting principles (GAAP)
- Documentation skills/financial record keeping

Available job offers



Project Manager

Company: [Fall Creek Farm and Nursery](#)

Location: [39318 Jasper Lowell Rd, Lowell, OR 97452](#)

[Learn more >>](#)

Follow us :



PMI Willamette Valley, Oregon Chapter

[Unsubscribe from this list - Remove me from all communication](#)