

“Operation: Qualify for Hire”

PMI’s Program for
Preparing the U.S. Military
for Project Management Careers

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1.0 Executive Summary

PMI is a proud supporter of the White House Administration's inspiring initiative known as Joining Forces. The Joining Forces program is a non-partisan national initiative led by the White House in support of service members, veterans and their families. The initiative is intended to mobilize public and private sectors to ensure that these individuals have the tools and resources they need to succeed throughout their lives.

PMI and many of our United States-based chapters are getting involved in presenting service members and veterans with the many opportunities that project management has to offer. Engaging military personnel in project management is mutually beneficial, as it is an excellent post-service career that is a great fit with many of the skills and disciplines learned in the service. It also helps to fill the gap of much-needed project management talent now and in the future.

PMI's "Program for Preparing the U.S. Military for Careers in Project Management" offers U.S. PMI chapters the opportunity to attract and serve those who serve their country. The ultimate goal of this program is to help military personnel find employment in the project management profession, using the benefits offered through membership, such as networking, mentorship, accessing professional development resources and certification.

This guidance document contains significant resources to help PMI chapters get started. It provides structure, PMI resources and key roles to enhance a current program or allow a chapter to launch one. By aligning with this program, it will allow chapters to increase their membership, certify new project management talent and increase the chapter's visibility in the community and within the profession.

There is very little start-up cost, if any at all, depending on the set up and preference of the chapter. What is crucial to this program are military volunteers (current or former), willing to allocate 4–10 hours per month to help fellow service members and veterans understand the value of certifications and membership, and assist those transitioning to successfully find employment.

If there is something missing, your chapter partner can help you find the information you need to establish this program in your area.



JOINING FORCES

TAKING ACTION TO SERVE
AMERICA'S MILITARY FAMILIES

Engaging military personnel in project management is mutually beneficial, as it is an excellent post-service career that is a great fit with many of the skills and disciplines learned in the service.

2.0 Mission

The men and women of the Armed Forces have served our country well. Over the past decades, these men and women have demonstrated selfless service and faced a multitude of challenges during their personal transitions. Today, there is a spirit of gratitude and appreciation for the service members and veterans of our country.

PMI believes that service members and veterans have already performed project and program management, just utilizing military methods and terminology. Through the PMI "Program for Preparing U.S. Military for Project Management Careers," chapters can assist military personnel and veterans to get certified and obtain rewarding civilian jobs, while enabling the civilian workforce with high-quality project professionals.

The project management profession is an ideal career for the military population transitioning into the civilian workforce. Overall, military service members and veterans have the personal and performance competencies to succeed in the project management profession, and PMI has an opportunity to help the military population see the value of their journey into the profession.

3.0 Importance of Program

Currently, there are 24 million U.S. veterans. Approximately 8.5 million of these veterans are employable. Additionally, almost 350,000 personnel transition from active military service to veteran status each year.¹ Although decreasing, unemployment among post-9/11 veterans is higher than the U.S. unemployment rate. These highly qualified men and women are seeking civilian careers, but are either unaware of the jobs available or unable to translate their military experience into something meaningful to civilian employers.

There are over 60 military installations located in the United States near major metropolitan areas, and even more, all near established PMI chapters. Furthermore, virtually all chapters have guardsmen, reservists and veterans in their geographic area. These local PMI chapters all have an opportunity to provide professional education, training, certification assistance and networking to the service member and veteran. In turn, by providing a contribution to the networking and the education of the service member, spouse and families, local chapters would potentially benefit through membership growth, while increasing the number of certified professionals.

PMI's "Program for Preparing U.S. Military for a Project Management Career," focuses on the "Employment" and "Education" resource areas of the White House Joining Forces Initiative, of which PMI is a proud supporter.



PMI's goal with this initiative is to aid veterans, active duty military, Guard, Reserve and their families to:

Join PMI and the local chapter

Qualify for PMI certifications

Achieve PMI certifications

Transition to civilian employment, while expanding their career network

4.0 Chapter Benefits

There are multiple benefits for the chapters that participate in this program:

Giving back by:

- Providing support for the military population and their families
- Strengthening community relationships
- Serving those who have served
- Raising awareness of the project management profession

Increase chapter engagement and health by:

- Broadening the diversity of the chapter membership base and volunteers
- Leveraging natural leaders who offer leadership at the local level, a characteristic ingrained in the military
- Increasing volunteer interest and activity through mentoring and other innovative military programs
- Engaging current chapter members to be a part of the program as volunteer mentors
- Increasing community engagement between members and local organizations interested in conducting recruiting, hiring or "day of discovery" types of events to recruit project management talent, specifically that of veterans.

5.0 Military Service Member/Veteran Benefits

In addition to all existing [benefits of a PMI membership](#), the following add value for service members and veterans:

- Membership in a global professional organization
- Strengthening community relationships through diversity
- Certification application assistance for all PMI certifications
- Bundled membership and certification assistance
- Discounts for global events
- Job Board and other career resources
- Training and educational resources and discounts
- Increased networking and information exchange
- Volunteering



6.0 Chapter Success Stories, Lessons Learned and Metrics

Planning is essential to the successful creation of the Military Liaison position. Success will be achieved as each chapter creates opportunities that work for their chapter and surrounding community. For chapters to succeed, it will be critical to share lessons learned and exchange information, such as presentations, marketing materials and ways chapters have made this program a success. PMI appreciates any and all feedback on a regular basis to capture and share the growing interest of this program. Feedback topics include:

- Sharing of success stories
- Measurement and key performance indicators (KPIs) via Military Liaison outreach to include:
 - Military personnel transitioning into project management
 - Certifications achieved (see [APPENDIX C](#) for tracking information)
 - Measurements of pre- and post-military liaison efforts
 - PMI memberships (see [APPENDIX C](#) for tracking information)
 - Chapter membership (see [APPENDIX C](#) for tracking information)
 - Activities conducted
 - Community activity participation

Use the the PMI Military LinkedIn Group to post success stories, certification announcements, training opportunities and newly certified military personnel.

Success will be achieved as each chapter creates opportunities that work for their chapter and surrounding community.



7.0 Program Rollout/Logistics

The program has been established for chapters to lead and participate. Chapter participation is voluntary and each PMI chapter will have a slightly different perspective on the Military Liaison role ([refer to section 10](#)) and how to interpret "serving those who have served."

Many chapters have already discovered the value of reaching out to and assisting the military population. They have created successful outreach programs, and PMI encourages those chapters to continue what they are already doing. This program provides a method to formalize the grassroots local volunteer programs currently in existence. Currently, over 40 chapters are in the planning stages or have created a Military Liaison position within their chapter.

[Start today.](#)

In addition to this playbook, refer to [Section 9.0 Program Resources](#) for additional materials, resources, links, connections and other great products available today to get your chapter engaged immediately.

[PMI Has Got Your Six:](#)

This Military Liaison volunteer position would work jointly with the PMI Government Relations Manager, Chapter Support Staff representative and other chapter Military Liaisons. Utilize the resources and existing support surrounding this program for your chapter's success.

8.0 Chapter Guidelines and Expectations

Participation in this program requires the following:

- Identify your existing military population within your chapter and determine if those individuals are willing to give back by volunteering to be a mentor.
- Appoint a Military Liaison ([see 10.0 Program Resources>Job Description](#)) within your chapter and identify how the position integrates within the chapters' current governance structure. It is recommended (but not required) to select a two-person team to promote active engagement. Volunteers for this position should have:
 - A very good understanding of PMI, the products offered and the chapter.
 - Military experience, contacts and access to the specific military installation where outreach is planned.
- Develop a "certification preparation process" for service members and veterans consistent with program goals. PMI strongly suggests a "no- or low-cost" price structure to reduce barriers to entry.
- Attend a training webinar for full program details.
- Define a launch date and let your chapter partner know so they can support you.
- Submit materials, feedback on measurements and successes as outlined in [6.0 Chapter Feedback](#).

Many chapters have already discovered the value of reaching out to and assisting the military population.

9.0 Program Resources

Due to the military environment and lack of commercial exposure, many service members and veterans will find the concepts of PMI application, qualification and certification foreign. Therefore, providing program resources to these groups is an essential element of the "Program for U.S. Military Preparing for Careers in Project Management."

Many baseline materials, resources, connections and other great products exist and are available through PMI to start your chapter on establishing a Military Liaison today.

As each chapter will have a slightly different perspective on how to engage in the program's activities, the following suggestions are provided to help define the role within the chapter.

Start up and Support

There are several key areas the chapter board members will need to focus on before launching the program. The board will need to understand the full opportunity, including:

- Whether or not this program is of value to the chapter and its membership
- If there are (or will be) volunteers to support it
- Determining how to recruit or select volunteers for the Military Liaison and Military Mentor roles
- Determining if there is a budget that can be allocated to the program
 - There is little to no start-up cost for the program. Support materials can be found in this guidance document, the Marketing Portal or on the PMI Liaison LinkedIn Group that point to resources and references needed to get the program up and running. Additional activities should be determined by the chapter, based on needs and size, and budget allocation appropriately.
 - The chapter may want to allocate funds for the purchase of business cards and name tags for the volunteers.
- Map out the role descriptions, qualifications, duties, benefits, responsibilities and education for:
 - Military Liaison role
 - Military Mentor role
- Join the PMI Military Liaison LinkedIn Group
- Review the chapter implementation plans
- Plan introductory activities

[Please refer to Section 10.0 for more thoughts on Start Up and Support.](#)

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Program Resources (continued)

SUPPORT PROCESSES FOR THE MILITARY POPULATION

PMI is offering a bundling of global membership, chapter membership (via the chapter Guest Pass program) and a certification. The Department of Veterans Affairs has approved all of PMI's certifications, and their associated cost, as eligible for reimbursement under the GI Bill.

Steps are as follows:

[Join](#) > [Qualify](#) > [Certify](#) > [Place](#)

The ultimate goal of this program is to facilitate the successful transition of military service members and veterans into a meaningful and successful project management career. PMI offers multiple resources, categorized below, to help the individual through their journey.

Join — PMI provides a community via chapter engagement, ProjectManagement.com and certification. Candidates join PMI and their local chapter to engage with this community and take advantage of the benefits offered through membership.

Qualify — Military personnel are used to having access to professional development opportunities to improve and fill skills gaps. PMI provides such offerings to its members, including training courses, webinars and networking. Of particular note, preparation courses or study groups for PMI certifications are offered by the chapters and are an important element in supporting the certification process.

Certify — All of PMI's certifications are approved for reimbursement under the GI Bill. These certifications are also globally recognized and in demand by employers. Gaining a PMI certification further supports transitioning individuals in finding careers outside of the service that leverage their experience and expertise.

Place — Mentors provide military service members and their families with the advice and support to get the most out of their membership, qualify for certification, apply for and prepare for their certification exam(s) and secure employment. Likewise, PMI and many of its local chapters offer candidates access to jobs via their job boards or the global PMI Project Management Job Board. PMI's Job Board also offers career support through services, such as résumé writing and critiquing, career coaching, interviewing skills and many more.

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Program Resources (continued)

JOIN

Applying for PMI and Chapter Membership

PMI membership signifies that the individual is serious about the project management career and professional development. It highlights this dedication to employers, colleagues and stakeholders, giving an edge in the job market. It also provides access to valuable knowledge, networks and resources that help individuals improve and advance. As PMI members, military personnel and veterans will gain exclusive access to PMI publications and global standards, plus networking opportunities through ProjectManagement.com and PMI chapters. They will grow and develop as leaders through volunteer opportunities, and receive discounts on training, events, certification exams and renewals.

The Military Liaison and Mentors are responsible for assisting transitioning service members and veterans in understanding the unique benefits of membership.

Application for membership needs to be submitted to PMI separately.

NOTE: If the service member or veteran who has GI Bill benefits has decided to apply for certification and desires to be a PMI member, membership (for one year) may be bundled with the certification for a single fee that is eligible for reimbursement under the GI Bill. In this case, BOTH applications need to be submitted to PMI and the individual should follow the reimbursement process as outlined in APPENDIX A.

Chapter Guest Pass Program

Chapters should be familiar with the Chapter Guest Pass program. All elements of the Chapter Guest Pass Program apply to this program. For more information on the Chapter Guest Pass Program, please reach out to and coordinate with the appropriate chapter board member.

Application for membership needs to be submitted to PMI separately.

PMI will reimburse chapters for each chapter Guest Pass issued in accordance with standard processes and up to the US\$500 maximum per chapter.

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They will grow and develop as leaders through volunteer opportunities, and receive discounts on training, events, certification exams and renewals.

Program Resources (continued)

QUALIFY

Chapter Training

Many chapters offer training throughout the year, including preparation for certification exams, and in some cases, study groups. Chapters should collaborate with local Registered Education Providers to provide low- or no-cost training solutions for military service members, veterans and their families.

Example: Black Diamond Charities (BDC), in partnership with PMI-Chicagoland Chapter, offers a project management training class available to military veterans who want to strengthen their résumés and improve their job skills. Veterans who attend this class learn how to develop the skills they acquired in the military and apply them to projects in the business world through lectures, exercises and coaching. PMI-Chicagoland Chapter project manager volunteers teach the course (BDC provides a one-day course to train the volunteer instructors). After the course is complete, the veterans have the option to continue working with the volunteers as mentors. **Black Diamond Charities supplies the materials needed for the course so there is no cost to the veterans.**

Registered Education Providers

PMI has a robust listing of Registered Education Providers (R.E.P.s) who offer project management training and certification test preparation. Many of PMI's chapters partner with local R.E.P.s to provide training to their membership.

Several providers offer training and education opportunities specifically for government, military and Department of Defense (DoD) candidates.

- [Visit the R.E.P. Directory.](#)

Credentialing Opportunities Online (COOL)

For **Active Duty military**, there are several programs available, known as "Credentialing Opportunities Online" (COOL). These COOL programs are available to four branches of the military. Each program offers general information, requirements of certification, how to fill gaps in skills, how to obtain vouchers to cover the cost and more.

For branch-specific programs, please visit one of the links below for more information:

- [U.S. Army](#)
- [U.S. Navy](#)
- [U.S. Air Force](#)

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Chapters should collaborate with local Registered Education Providers to provide low- or no-cost training solutions for military service members, veterans and their families.

Program Resources (continued)

CERTIFY

Certification

In an increasingly projectized world, PMI professional certification ensures that individuals are ready to meet the demands of projects and employers across the globe.

Developed by practitioners for practitioners, PMI certifications are based on rigorous standards and ongoing research to meet the real-world needs of organizations. With a PMI certification, practitioners can work in virtually any industry, anywhere in the world and with any project management methodology.

For transitioning military service members and veterans, it is important to review the application criteria ahead of time to see if they meet the certification requirements. The Military Mentors should provide guidance for individuals, helping them to translate their experience and guiding them throughout the application process.

For the full listing of certifications and best fit, [view this page](#):

All PMI certifications require individuals to meet domain experience levels, educational levels or both before they apply. Applicants will need to provide PMI with the details of this experience and education, **so it is best to gather and prepare this information before opening the application.**

To find out the eligibility requirements, consult the handbook for the certification that interests the candidate. Each one has unique eligibility criteria.

Please visit this link to understand the [application process](#).

For more information on licensing and certification, have candidates visit the following links:

- [Department of VA](#)
- [Military.com](#)

Applications for certification and membership need to be submitted to PMI separately. For those electing membership **AND** certification **AND** using the GI Bill, they will be reimbursed the full amount **AFTER** passing the certification exam and becoming a member when submitting their reimbursement request to the Department of Veterans Affairs.

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Developed by practitioners for practitioners, PMI certifications are based on rigorous standards and ongoing research to meet the real-world needs of organizations.

Program Resources (continued)

CERTIFY

Bundling covers all certifications except for a portion of the Certified Associate in Project Management (CAPM)[®] and the PMI Agile Certified Practitioner (PMI-ACP)[®]. For transitioning military looking to achieve the CAPM or PMI-ACP, the cost of membership and certification is higher than the reimbursement allowance for the VA. The graphic below shows the details and any remaining costs to the military member depending on certification choice when bundling.

Certification (Member) Cost	New Membership Cost	Chapter Membership Cost	Total Cost Covered by VA/GI Bill	Remaining Cost to Military Member
CAPM [®] US\$225.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$300.00	~ US\$64
PMP [®] US\$405.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$555.00	None
PgMP [®] US\$800.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$1,000.00	None
PfMP [®] US\$800.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$1,000.00	None
PMI-RMP [®] US\$520.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$670.00	None
PMI-SP [®] US\$520.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$670.00	None
PMI-PBA [®] US\$405.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$555.00	None
PMI-ACP [®] US\$435.00	US\$139.00	US\$25-\$40 (cost reimbursed via Chapter Guest Pass Program)	US\$495.00	~ US\$79

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Program Resources (continued)

PLACE

Career Services

Through PMI's chapters and the Project Management Job Board (www.pmi.org/job-board) there are several services available to individuals looking for the best way to present their experience.

Chapters participating in the program should consider mentoring those in transition and offer assistance via the Military Liaison and Mentors as outlined above.

Through the project management Job Board, there are multiple services available, including résumé and cover letter writing, résumé review and critiquing, career coaching and other career tips. These services are available for military service members, veterans and their families at **NO CHARGE** with a promotional code that can be redeemed upon securing the service.

Chapter Job Boards

Many of PMI's local chapters offer job boards with open positions. Chapters should introduce transitioning service members or veterans to the local job board if one is available.

PMI Project Management Job Board (Global)

As mentioned above, PMI offers a global job board with open positions around the world, with the bulk of jobs in North America. Anyone (member, non-member, certification holder, non-certification holder, etc.) looking for a career in project management can create a profile, upload their résumé, and search and apply for jobs. There is **NO CHARGE** to use this service. Visit www.pmi.org/job-board for more information.

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Through the project management Job Board, there are multiple services available, including résumé and cover letter writing, résumé review and critiquing, career coaching and other career tips.

Program Resources (continued)

COLLABORATION WITH MILITARY SUPPORT ORGANIZATIONS (MSOs)

PMI is working to develop relationships and strategic partnerships with key military support organizations to further support the transitioning service member or veteran. The following list is an example of some organizations PMI is looking to collaborate with to enhance and make this program successful. For military liaisons, use these links to gain insight and understanding into what PMI is doing.

Department of Veterans Affairs (va.gov)

PMI has worked closely with the Department of Veterans Affairs for many years. Currently, all of PMI's certifications are approved, and service members and veterans can submit the cost for coverage by their GI Bill. In addition to securing approval for reimbursement of PMI certifications, there are also opportunities to collaborate on career-oriented opportunities for this audience.

White House Joining Forces (<https://www.whitehouse.gov/joiningforces>)

PMI is a proud supporter of the Joining Forces program. The Joining Forces initiative focuses on three key areas of education, employment and wellness for military service members, veterans and their families. PMI's Military Program focuses on both education and employment.

First Lady Michelle Obama and Dr. Jill Biden wrote an article detailing the importance of organizations making a concerted effort to hire transitioning military as part of the Joining Forces program. [View the article here.](#)

Veterans on Wall Street (VoWs)² (www.veteransonwallstreet.com)

PMI is a member of Veterans on Wall Street. This informal group seeks to bring the very best of the financial services industry together to support and honor service men and women. In a non-competitive environment, VoWs organizes its collective efforts to leverage each organization's individual initiative by sharing best practices, and working toward two fundamental and common goals:

- Raising awareness about the issues faced by our transitioning military service men and women and their families across the financial services industry and beyond; and
- Leveraging the collective resources to improve the conditions under which service members and veterans transition to civilian life at home.
- Veterans on Wall Street strives to:
 - Demonstrate the value of veterans and service men and women in the workforce;
 - Engage in combined, informed charitable giving to veterans-focused organizations;

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First Lady Michelle Obama and Dr. Jill Biden wrote an article detailing the importance of organizations making a concerted effort to hire transitioning military as part of the Joining Forces program.

- Manage efforts through a non-competitive, central governance body with equal representation of each member firm;
- Contribute and volunteer those resources requisite to achieving our goals; and
- Continue with individual efforts, leveraging veterans on Wall Street to share best practices, increase network capacity and coordinate efforts to greater effect than would be possible as individual efforts.

PMI is leveraging this relationship to educate organizations about the strategic value of project management, while also helping them source transitioned military service members in the project management profession.

Society of American Military Engineers (SAME)³ (www.same.org)

The Society of American Military Engineers leads collaborative efforts to identify and resolve national security infrastructure-related challenges. Founded in 1920, SAME unites public and private sector individuals and organizations from across the architecture, engineering, construction, environmental and facility management, cyber security, project planning, contracting and acquisition and related disciplines in support of national security.

SAME provides its more than 30,000 members extensive opportunities for training, education and professional development through a robust offering of conferences, workshops, networking events and publications. With a membership that includes recent service academy graduates and retired engineering officers, project managers and corporate executives, uniformed and public sector professionals and private sector experts, SAME bridges the gap between critical stakeholders to help secure our nation. SAME consists of 105 posts and more than 50 student chapters and field chapters around the world, along with a headquarters staff.

PMI is in preliminary discussions with SAME to form a mutually beneficial relationship. As those discussions mature, we will communicate the details of this relationship.

Military Officers Association of America (MOAA)⁴ (www.moaa.org)

MOAA is the nation's largest and most influential association of military officers. They are a powerful force speaking for a strong national defense and representing the interests of military officers and their families at every stage of their careers. In addition to representing active duty military, veterans and their families' interests before Congress, MOAA offers a wide range of personal and financial services exclusive to MOAA membership.

PMI plans to work with MOAA in a mutually beneficial and collaborative manner to further both institutions' goals in helping service members, veterans and spouses with transitioning into the civilian world and career service support. As those discussions mature, we will communicate the details of this relationship.

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SAME provides its more than 30,000 members extensive opportunities for training, education and professional development through a robust offering of conferences, workshops, networking events and publications.

Institute for Veterans and Military Families (IVMF)⁵ (<http://vets.syr.edu/>)

The IVMF is the first interdisciplinary national institute in higher education focused on the social, economic, education and policy issues affecting veterans and their families post-service. Through our focus on veteran-facing programming, research and policy, employment and employer support, and community engagement, the institute provides in-depth analysis of the challenges facing the veteran community, captures best practices and serves as a forum to facilitate new partnerships and strong relationships between the individuals and organizations committed to making a difference for veterans and military families.

PMI and IVMF are exploring potential opportunities to collaborate, specifically around the topics of training, certification and career for military service members, veterans and spouses. As those discussions mature, we will communicate the details of this relationship.

VetJobs.com (www.vetjobs.com)

VetJobs.com is one of the largest job boards for military service members and veterans. PMI plans to collaborate with VetJobs.com to make more job opportunities available in project management for this audience. As those discussions mature, we will communicate the details of this relationship.

PACKAGED BENEFITS TO THE MILITARY POPULATION

Chapter Benefits

Chapter membership via the Chapter Guest Pass Program

- Chapters will be reimbursed the chapter dues for each military member who uses a promo code. Military Liaison will secure a Chapter Guest Pass (CGP) code from the chapter for free chapter membership upon receipt of the PMI member ID and name. The CGP code should also be included on the tracking sheet. View this link for more information regarding the [Chapter Guest Pass program](#).

Optional chapter offerings:

- Event discounts
- Scholarships

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PMI Benefits

Annual Events

- PMI offers two annual [events](#) each year. For those overseas, there is the [PMI Global Congress—EMEA](#), usually held in Q3 of the government fiscal year. For those in the United States, there is the [PMI Global Congress—North America](#), usually held in late Q4 or early Q1 of the government fiscal year. These events provide robust education and knowledge-sharing opportunities, organized networking, industry recognition, service-oriented activities and invaluable moments of inspiration for personal and professional growth. There is a government rate offered to the military population.

ProjectManagement.com Webinars

- [ProjectManagement.com](#), PMI's global knowledge portal, is the home for PMI knowledge, networking and community. With membership, individuals are able to access ProjectManagement.com. This online community provides practice areas, which focus on various topical areas within project management. Access to content and networking on ProjectManagement.com is a PMI membership benefit. Using PMI.org login credentials, members can automatically gain access to the premium content on ProjectManagement.com, as well as a global community of peers. Non-members are able to network, but do not have access to premium content on the site. Webinars are a key offering of this community, where practitioners can learn about topics to improve their knowledge and skills.
- ProjectManagement.com provides:
 - Opportunities to contribute and collaborate with other professionals and experts around the world
 - Professional development resources like webinars, virtual conferences, discussion groups and more.
 - Greater access to a variety of tools and content
 - Connectivity and visibility to almost 3 million practitioners around the world
 - Recognition for your veteran or active duty status, PMI certifications, chapter affiliation, volunteer work and additional activities like writing articles, answering questions and attending events

Registered Education Providers (R.E.P.s) – Military

- See [QUALIFY Section](#) above for link to R.E.P.s and search for terms like “military,” “government” and “veteran” to find R.E.P.s who specialize in training military audiences.

Academic Degree Programs – Yellow Ribbon

- The Project Management Institute Global Accreditation Center for Project Management Education Programs (GAC) accredits project management and related degree programs

[SUPPORT PROCESSES FOR THE MILITARY POPULATION >](#)

[JOIN >](#)

[QUALIFY >](#)

[CERTIFY >](#)

[PLACE >](#)

[COLLABORATION WITH MILITARY SUPPORT ORGANIZATIONS \(MSOS\) >](#)

[PACKAGED BENEFITS TO THE MILITARY POPULATION >](#)

Using PMI.org login credentials, members can automatically gain access to the premium content on ProjectManagement.com, as well as a global community of peers.

at the bachelor's, postgraduate and doctorate levels offered within accredited institutions of higher education worldwide. Many of the schools with accredited programs are also "Yellow Ribbon Schools" that offer some financial assistance in addition to the GI Bill to help a service member or veteran obtain their degree.

- [Listing of GAC Schools](#)
- [Listing of Yellow Ribbon Schools](#)

PMI Professional Development Offerings

- Professional development is a continuous part of an individual's project management career. Transitioning individuals who make it a priority to assess and improve their skill set will increase their value to an organization and enhance their future career prospects through a variety of professional development opportunities.
- **Online Courses:** Available at any time to improve project skills and knowledge at one's own pace, anywhere that is convenient for them. Visit: <http://learning.pmi.org/>
- **Face-to-Face:** Provides an opportunity to develop project management skills in an interactive group setting, along with valuable networking opportunities at [SeminarsWorld®](#).

Job Boards (See [PLACE section](#) above for more information on the job boards and career services.)

- Chapter
- PMI Job Board

[SUPPORT PROCESSES FOR THE MILITARY POPULATION >](#)

[JOIN >](#)

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[COLLABORATION WITH MILITARY SUPPORT ORGANIZATIONS \(MSOS\) >](#)

[PACKAGED BENEFITS TO THE MILITARY POPULATION >](#)

Many of the schools with accredited programs are also "Yellow Ribbon Schools" that offer some financial assistance in addition to the GI Bill to help a service member or veteran obtain their degree.

10.0 Start Up and Support

JOB DESCRIPTIONS

The following positions and their supporting descriptions are for organization and modification per chapter standards. The key to success will be to identify a Military Liaison who understands both the military and PMI's mission and core values of impact, professionalism, volunteerism, community and engagement. Currently, the following positions are for consideration by a chapter:

- Military Liaison
- Military Mentor

Additional examples are continually presented through PMI's Volunteer Relationship Management System (VRMS). Narrow your results with search terms using any of the following: Military Liaison, Military or Military Mentor. [Visit the VRMS.](#)

Position: Military Liaison

Position level: Appointed volunteer position by the PMI chapter board

Reports to:

VP or Director as determined by the PMI chapter board

Purpose:

The purpose of the Military Liaison is to serve as a liaison between the local PMI chapter board, members and the local military installation or regional military membership geographically located within the chapter's designated area. The Military Liaison is responsible for promoting membership benefits of PMI and the chapter to the local members of the military installation or organization. The Military Liaison will act as a guide and bridge to military personnel interested in PMI for Q&A, membership benefits, as well as certification support, networking and career connectivity. Expectations for this roll are to engage in active outreach to their local military installation(s), veterans groups, in addition to being a resource for the local military population. Under guidance of the local PMI Chapter Membership Role, this position will at a minimum track new military members and certifications achieved.

Chapter Budget for the Military Liaison:

It is expected that the annual chapter budget for the Military Liaison role will be sized according 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 purpose of the Military Liaison is to serve as a liaison between the local PMI chapter board, members and the local military installation or regional military membership geographically located within the chapter's designated area.

- Business cards, name tags, marketing materials, meeting meal fees and any meeting costs that may be required (room costs, etc.).
 - **Name tag** – The standard chapter format will be used.
 - **Business cards** – The chapter business card format will be used in accordance with local chapter criteria using the title “Military Liaison.”

Time Commitment:

- Military Liaison role is a 1-year term, in accordance with chapter’s policies and procedures.
- 4–8 hours/month

Qualifications:

- Active duty, retired or honorable discharge from U.S. military (preferred)
- Certified PMP or CAPM strongly preferred, other PMI certifications acceptable
- A member in good standing with PMI and the local chapter
- Good organizational and written/verbal skills
- Marketing knowledge helpful
- Computer, internet and email access essential
- Ability to work with others to achieve consensus
- Strong networking skills
- Strong public speaking skills

Benefits:

- Professional and social networking
- Learn and develop new skills
- Share skills and talent
- Motivation and sense of achievement
- PDUs (per chapter volunteer guidelines)
- Gain work experience
- Enhance résumé
- Build self-esteem and self-confidence
- Make an impact in the field of military transitions into commercial work
- Sharpen leadership skills

[JOB DESCRIPTIONS >](#)[PMI MARKETING PORTAL/
LINKEDIN GROUP >](#)[CHAPTER
IMPLEMENTATION >](#)[EXAMPLE ACTIVITIES >](#)

Guidelines:

- The Military Liaison reporting structure is determined by the chapter board.
- No voting power is granted to the Military Liaison position.
- 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.
- The Military Liaison role will need to sign the Conflict of Interest Forms, confidentiality and other forms in accordance with local chapter policies.
- The Military Liaison will have access to the Component System (CS), the PMI Leadership site and the PMI Region Leadership site.
- The Military Liaison will earn PDUs under the same guidelines as any other committee member.

Summary of duties (as deemed fit per chapter):

- Enhances efforts to maximize new memberships and renewals, including membership drives and on-site military brown bag luncheons or meetings.
- Supports local chapter with announcements of new military memberships at meetings.
- Contributes to marketing/newsletter/website.
- Communicates Military Liaison efforts and measurements through PMI global resources.
- Tracks key performance indicators (KPIs) measurements in the form of new military members and certifications achieved.
- Supports PMI and other Military Liaisons to assist in knowledge sharing and lessons learned.
- In accordance with chapter policies and procedures, provides local chapter marketing assistance. Examples include:
 - Creating and circulating a “new member packet” with information about local chapter community involvement, military discounts and benefits as well as introducing the local chapter PMI board.
 - Establishing relationships with local community organizations in support of hiring/training military in transition.
 - Understanding and familiarity with the PMI and chapter website, including membership, certifications, standards and product fees.
 - Attending a minimum of four to six chapter meetings; available for annual planning sessions.
 - Pending fiscal and budgetary resources, in charge of a booth at chapter networking events.

Position: [Military Mentor](#)

Position level: Appointed volunteer position by the PMI chapter board

[Reports to:](#)

VP or Director as determined by the PMI chapter board

[Purpose:](#)

The Military Mentor position is informal and is open to multiple volunteers within the chapter. If feasible, it would be helpful to have at least one Military Mentor from each branch, or representing the majority of the military audience in the area. The Military Mentor would support the Military Liaison role, in addition to providing the following support to local active duty and veteran personnel.

[A Critical Role: Application Assistance](#)

A critical role the Military Mentor will take on is assisting service members or veterans in translating their skills and experience during the certification application process. Many times, an application is rejected due to the military acronyms and language used on the application that does not "translate" well in the civilian world. It is imperative that the Military Mentors are able to assist with developing the right language and verbiage to effectively convey the military service member or veteran's experience to civilian job duties.

[Chapter Budget for the Military Mentor:](#)

- See Military Liaison

[Business cards and name tags for the Military Mentor:](#)

- Business cards – The chapter business card format will be used in accordance with local chapter criteria using the title "Military Mentor."

[Time Commitment:](#)

- Military Mentor role is a 1-year term, in accordance with chapter's policies and procedures.
- 4-8 hours/month

[Qualifications:](#)

- See Military Liaison

[Benefits:](#)

- See Military Liaison

[Guidelines:](#)

- See Military Liaison

[JOB DESCRIPTIONS >](#)[PMI MARKETING PORTAL/
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IMPLEMENTATION >](#)[EXAMPLE ACTIVITIES >](#)

The Military Mentor position is informal and is open to multiple volunteers within the chapter.

Summary of duties (as deemed fit per chapter):

The Military Mentor would support the Military Liaison role, in addition to providing the following support to the local military population:

- Provide career and moral support:
 - Résumé writing tips
 - Interviewing tips
 - Advice on service and experiential translation
 - Community hiring awareness
- Provide networking support
- Provide certification advice/assistance, and experience translation
- Provide the benefits for becoming a PMI and local chapter member
- In accordance with chapter policies and procedures, provide local chapter marketing assistance. See Military Liaison for details.
- In addition to assisting with experience translation and application assistance, Military Mentors will play a key role in assisting with **BOTH** the membership and certification application processes. (See [JOIN](#) and [CERTIFY](#) sections above)

START UP AND SUPPORT: PMI MARKETING PORTAL

Access the PMI marketing portal at [PMI.org/Marketing Portal](https://www.pmi.org/MarketingPortal). Click through to register with your PMI.org user information. As the Military Liaison for your chapter, you will be approved by PMI. You will receive a system confirmation and you will be able to search the available media (brochures, presentations, videos, fliers, etc.) Please select the role of "Chapter."

This site provides additional support materials, such as:

- This playbook
- [Preparing Military for PM Careers Training Slides](#)
- [PDF of the VA reimbursement process](#)
- [Brochure: Take Your Military Experience and Transition To A Career in Project Management](#)
- [Other chapter military support materials](#)

START UP AND SUPPORT: LINKEDIN GROUP

Military Liaisons and Mentors are encouraged to join the 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 this program.

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The latest and greatest information regarding the program can be found there. The LinkedIn site should be used to post questions and seek answers through discussions and cross-chat. Additional resources, such as slide decks, stories and news can also be found and shared here, in addition to the PMI Marketing Portal.

START UP AND SUPPORT: CHAPTER IMPLEMENTATION

A basic road map for approval and maturation of the positions are presented below.

- Board approval (reference slides about the position for usage and modification is available via the LinkedIn Group: PMI Military Liaison).
- Permissions established for Components Site and Marketing Portal.
- Military Volunteers familiarize themselves with this playbook, training slide decks and materials on the Marketing Portal.
- Military Liaison develops “lunch-and-learn” programs/workshops/after-hours activities at the local military installation. Slides present the capabilities of PMI, the benefits of certification and why military service members make good project managers (slide deck for usage and modification is available via the LinkedIn Group: PMI Military Liaison).
- Military Liaison invites lunch-and-learn/workshop attendees to chapter pre-meeting. This is specifically geared for transitioning military project managers (slide deck for usage and modification is available at the LinkedIn Group: PMI Military Liaison).
- Attends local military base job and education fairs on behalf of PMI and local chapter. Invites attendees to future lunch-and-learn sessions and local chapter meetings.
- Conducts local meetings through PMI, organizations and community functions offering awareness, transition success and more.
- Attends chapter strategy sessions developing creative, locally tailored military liaison program to increase outreach to military community and leverage membership growth.
- Increases community outreach through relationship development with local organizations supporting transition military to project management.
- Develops and matures the Military Mentor program through one-on-one alignment of military veterans who are certified and those veterans who are seeking certification.

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START UP AND SUPPORT: EXAMPLE ACTIVITIES

Chapter activities to be developed by the Military Liaison role include, but are not limited to:

- Executing lunch-and-learn programs/workshops that bring education and understanding to the military installation personnel. The tenets of this effort are to teach military personnel 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 membership (PMI and local chapter) and gain an understanding of how to prepare for their transition from the military.
- Offering professional development at low cost/no cost to military service members. Examples include dinner meetings, symposiums, Professional Development Days (PDD) and chapter training. These chapter professional development discounts could also be extended to active Civil Service and DoD Contractors (increases opportunities for networking).
- Recruiting and managing a team of Military Mentors within the chapter (See [MILITARY MENTOR ROLE](#)).
- Providing general information at quarterly career and education fairs at the local military installation.
- Providing invitations and communications to military personnel regarding networking sessions held at the local chapter.
- Encourage individuals to join (via Chapter Guest Pass program) or participate in pre-chapter meeting sessions (those who are certification holders can receive PDUs aligned to the PMI Talent Triangle™, 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 the military to project management and speak about transition challenges/success)
 - Military transition assessments
 - Interviewing tips and branding
 - Differences in military/commercial terminology and project terminology
 - Knowledge
 - Gain insight and knowledge into current job outlooks and salaries

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- Gain insight and knowledge into current area and U.S.-based industries increasing project management positions
- 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 the military
- Differences and value between PMI certifications versus DAU (Defense Acquisition University) project/program certifications and FAC-PPM certifications, which focus on acquisition and procurement knowledge
- Membership benefits



11.0 PMI Staff Contacts

Customer Care

For more general questions, about:

- Membership, including application process
- Certification, including application process
- Online learning products
- Events
- Project Management Job Board

Please reach out to PMI's Customer Care team Monday–Friday, 08:00–20:00 EDT

- Email: customer-care@pmi.org (preferred method)
- Toll number: +1-610-356-4600
- Toll-free number: 1-855-746-4849
- Fax: +1-610-356-4647
- [Live chat](#): Monday–Friday, 10:00–18:00 EDT (UTC -4).

PMI Chapter Staff Support

Please reach out to your PMI Chapter Partner or Administrator for questions regarding the following:

- PMI Program for Transitioning Military (overview, benefits, implementation, etc.)
- Military Liaison or Mentor roles

PMI Government Relations

For information about PMI's advocacy in the Federal government, including:

- The Program Management Improvement and Accountability Act (PMIAA)
- Work with the Defense Acquisition University (DAU)
- Civilian agency efforts, including the Department of Veterans Affairs

For general government relation queries, please contact the PMI Government Relations Team at government.relations@pmi.org.

PMI Military Liaison LinkedIn Group

Submit your question and/or information request through this social media outlet.

12.0 Acknowledgments

PMI would like to thank several key contributors to the development of this document and program.

- Sandy Cobb, PMP®, PgMP®, PfMP®, ITIL®, M.Ed
- LTC Jay Hicks (Army, Ret.), PMP®
- Dr. Tracey Richardson (USAF, retired), PMI-RMP®, PMP®

Sandy Cobb and Jay Hicks co-developed the "Military Liaison Position Cookbook," which was used in its entirety as part of this document. They graciously offered their intellectual property for the greater good of this program. In addition, they are key reviewers of content, helping to improve its purpose and dissemination of its critically important content for those that serve and have served our country.

Jay Hicks was the first Military Liaison appointed by the PMI Tampa Bay Chapter. Sandy and Jay have galvanized and organized all grassroots participation among chapters to gain unity and momentum in this important effort.

Dr. Tracey Richardson is an Assistant Professor at Embry-Riddle Aeronautical University—Worldwide. Her research interests include advancing the project management discipline in both the academic and professional settings, project management competencies and career paths, and the alignment of project management career demands to military training and experience.

PMI sincerely thanks them for their efforts in developing and getting this program off the ground.

APPENDICES

APPENDIX A



APPENDIX B

Listing of additional helpful articles, papers and books

- [Dr. Tracey Richardson's paper - Competency Framework Alignment: Why Military Experience Provides Ideal Preparation for Project Management Professionals](#)
- [Sandy Cobb and Jay Hick's popular book: The Transitioning Military Project Manager](#)
- [Take Your Military Experience and Transition to a Career in Project Management brochure](#)
- [PM Network article by Jay Hicks: Special Service - How you can help military service members discover civilian project management](#)

APPENDIX C

PMI's Program for Preparing U.S. Military for Project Management Careers Membership and Certification Tracking Process

Chapters play a critical role in the outreach, development and engagement of new members and certification holders. To demonstrate the value of this outreach and engagement, as well as demonstrate success of this program, chapters need a way to track the military population who become members

and certification holders. Below is the process and tracking sheet to capture those who attain membership and/or certification through this program.

Please do not hesitate to reach out to your Chapter Partner with any questions.

Process for Tracking Membership and Certification

1. The Military Liaison, with support of the Military Mentors, does outreach to local military installations, at military-focused events, and engages the military population on the benefits of PMI membership, chapter membership and certifications.
2. Service members or veterans interested in PMI membership and/or certification should speak to a Military Mentor to obtain advice about what they would like to pursue.
3. Once the individual decides whether they would like to pursue membership and/or certification, the Military Mentor can provide assistance with application support and submission.

For Membership:

- Once the individual has applied and paid for PMI membership, they should provide the Military Liaison with their full name and PMI Member ID. The Military Liaison should use the attached tracking sheet.
- The Military Liaison will secure a Chapter Guest Pass (CGP) code from the chapter, for free chapter membership upon receipt of the PMI member ID and name. The CGP code should also be included on the tracking sheet. View this link for more information regarding the [Chapter Guest Pass program](#).

For Certification:

- The Military Mentors will offer assistance to the individual in applying, translating skills and preparing to sit for the certification examination.
- Once the individual has passed the exam, the Military Liaison should ask the individual to provide the certification name and certification date and enter it into the attached tracking sheet.

Completing the Tracking Process (on following page)

1. On the 1st of the month, the chapter emails their Chapter Partner a list of member names, member IDs, CGP codes, certification(s) and certification(s) date, using the tracking sheet.
2. Tracking sheets are consolidated by Chapter Partner and sent to the Membership and Certification Teams.

13.0 Citations

¹ Veterans Administration report: Profile of Post-9/11 Veterans 2014. [View Source](#)

² Veterans on Wall Street www.veteransonwallstreet.com

³ Society of American Military Engineers www.same.org

⁴ Military Officers Association of America www.moaa.org

⁵ Institute of Veterans and Military Families <http://vets.syr.edu/>