



Annual Chapter Meeting

PMI - Orange County Chapter, Inc.

June 14, 2011

PMI-OC Vision & Mission Statements

A stylized blue wireframe globe is positioned in the top right corner of the slide, partially cut off by the edge. It features a grid of latitude and longitude lines.

“...We provide **value** to our stakeholders and the community at large..”

We promote the **development of project management** as a benefit in all industries.”

“..We **promote project management** by providing services, tools and knowledge to project sponsors, project managers, team members and the community..”



PMI-OC Statistical Overview

- 1655 Members as of 6/12/2011
- 1071 Project Management Professionals (PMP®)
- 11 Certified Associates in Project Management (CAPM®)
- 5 Program Management Professional (PgMP®)
- 2 Project Management Institute Scheduling Professional (PMI-SP®)



PMI-OC Statistical Overview

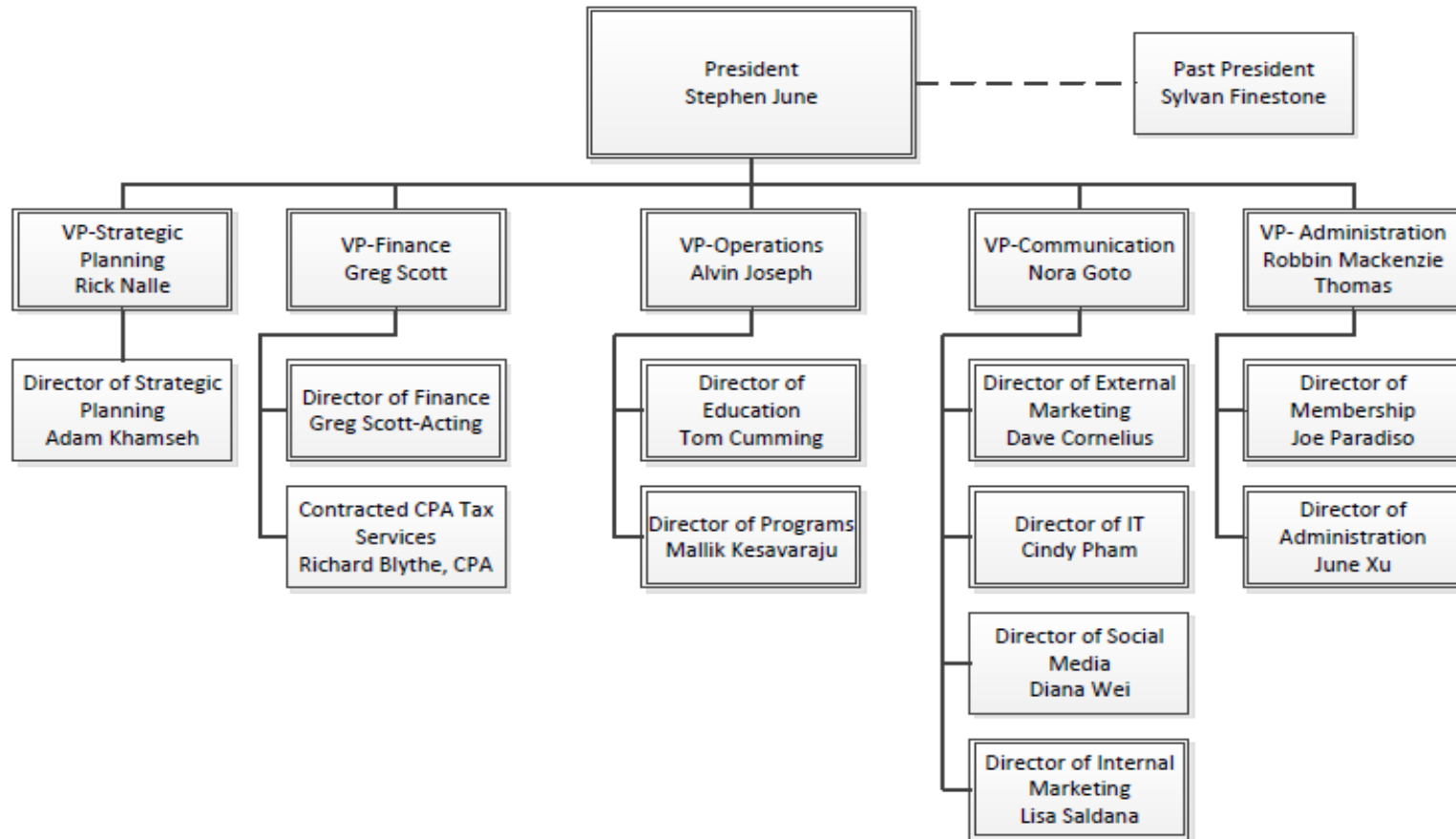
- Chapter growth has been relatively flat for the last two years
- Our 60% retention rate is in line with other chapters
- 65% of our members have more than 10 years of project management experience
- 9% of our members have less than 5 years of project management experience



What did we accomplish in 2010?

- Established a working strategic model to grow the chapter
 - Empowered a group of Directors to carry out the daily tasks of running a chapter
 - Conduced an election with more candidates than positions (a first for this chapter!)
 - Completed an initial set of job descriptions for each of the volunteer positions

Board and Director Structure - 2011





What did we accomplish in 2010?

- Initiated a monthly dinner meeting upgrade to provide greater member value (**still in process**)
- Conducted 3 PMP Prep Workshops
- Conducted 11 Advanced Topics Seminars
- Re-configured the annual Career Event to add an additional focus to and for members in transition
- Established a Quarterly Post Card mailing of upcoming chapter events



What did we accomplish in 2010?

- Conducted a Career Management webinar
- Moved the Milestones to a faster linked site to improve speed for our members (ISSUU.com)
- Sponsored the creation of the Project Managers Toastmasters club
- Identified the Project of the Year
- Selected the Volunteer of the Year
- Honored 10 Volunteers of the Month
- Utilized over 11,000 hours of volunteer service to support the chapter!

Chapter Financials 2010-2011

■ **SUMMARY**

- The chapter is very sound financially
 - We have over \$200,000 in liquid assets
 - We have no long-term debt
 - In spite of a bad economy last year, we posted a net loss of only \$2,630



Chapter Financials 2010-2011

ASSETS

Cash Accounts	\$ 120,245
CD's	\$ 115,680

TOTAL ASSETS **\$ 235,925**

LIABILITIES AND EQUITY

Total Credit Cards	\$ 5,269
Total Liabilities	\$ 5,269

Equity

Retained Earnings	\$ 142,159
Unrestricted Net Assets	\$ 91,127
Net Income	\$ (2,630)
Total Equity	\$ 230,656

TOTAL LIABILITIES AND EQUITY **\$ 235,925**

Chapter Financials 2010-2011



	Income	Expense
Communications	\$ 4,435	\$ 25,303
Finance	\$ 1,035	\$ 41,030
Operations	\$ 131,825	\$ 100,491
Membership/Admin	\$ 57,965	\$ 4,864
Strategy		\$ 396
President		\$ 25,805
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	\$ 195,260	\$ 197,889



What will we accomplish in 2011?

- Improve the quality of the dinner meeting
 - The dinner meeting remains our signature event, the chapter activity that most non-members first see
 - We will improve the quality of the speakers, networking capabilities, and “takeaways” from the event
 - We will improve the delivery of the dinner meeting (food, ambiance, networking, etc.)



What will we accomplish in 2011?

- Initiate new programs that provide significant value to the members
 - An Agile Training Course in cooperation with an outside vendor
 - A PMBOK-aligned Workshop to increase the knowledge of our more experienced members
 - A new workshop (“PM101”) to increase the proficiency of our less experienced members
 - In response to member requests, we will create a mentoring program



What will we accomplish in 2011?

- We will create at least two virtual PDU events (online and podcast) allowing convenient access to members to acquire PDU's
- Publish and maintain a rolling three-month calendar of events on the web site
- Create a new networking event separate from the dinner meeting
- Roll-out the enhanced Volunteer Recognition Program, which actively acknowledges and rewards volunteer participation



What will we accomplish in 2011?

- Re-energize the Ambassador Program
 - Restart the Welcome Letter from the President
 - Develop (train) and deploy more qualified Ambassadors at chapter events
 - Enhance the operational effectiveness of our Strategic Model
 - Publish a Strategic Score Card
 - Publish a set of Committee Charters



What will we accomplish in 2011?

- Increase our social networking presence
 - Launch Facebook
- Expand our LinkedIn site
- Seek out new ways (Twitter?) to communicate and engage both new and potential members
- Develop community outreach initiatives to develop partnerships and to attract new members
- Outsource bookkeeping functions

What do we have to succeed in 2011?

- We have a vision
- We have a new three-year Strategic Plan
- We have a strategic Board
- We have an organizational structure led by Directors with defined Committees operating below the Board
- We have available funds



What is missing to succeed in 2011?



- Active and engaged Volunteers
 - The Governors and the Directors can't do it by themselves
- New and Fresh Ideas
 - What do you want from your chapter that we have not already identified from your input?

Questions?

- Talk to me (or email me at President@pmi-oc.org)
- Talk to the Board
- Talk to a Director

