



# **Annual Chapter Meeting**

***PMI - Orange County Chapter, Inc.***

***May 8, 2012***

## PMI-OC Vision & Mission Statements

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“...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 will become a **premier** PMI Chapter,”

## PMI-OC Statistical Overview

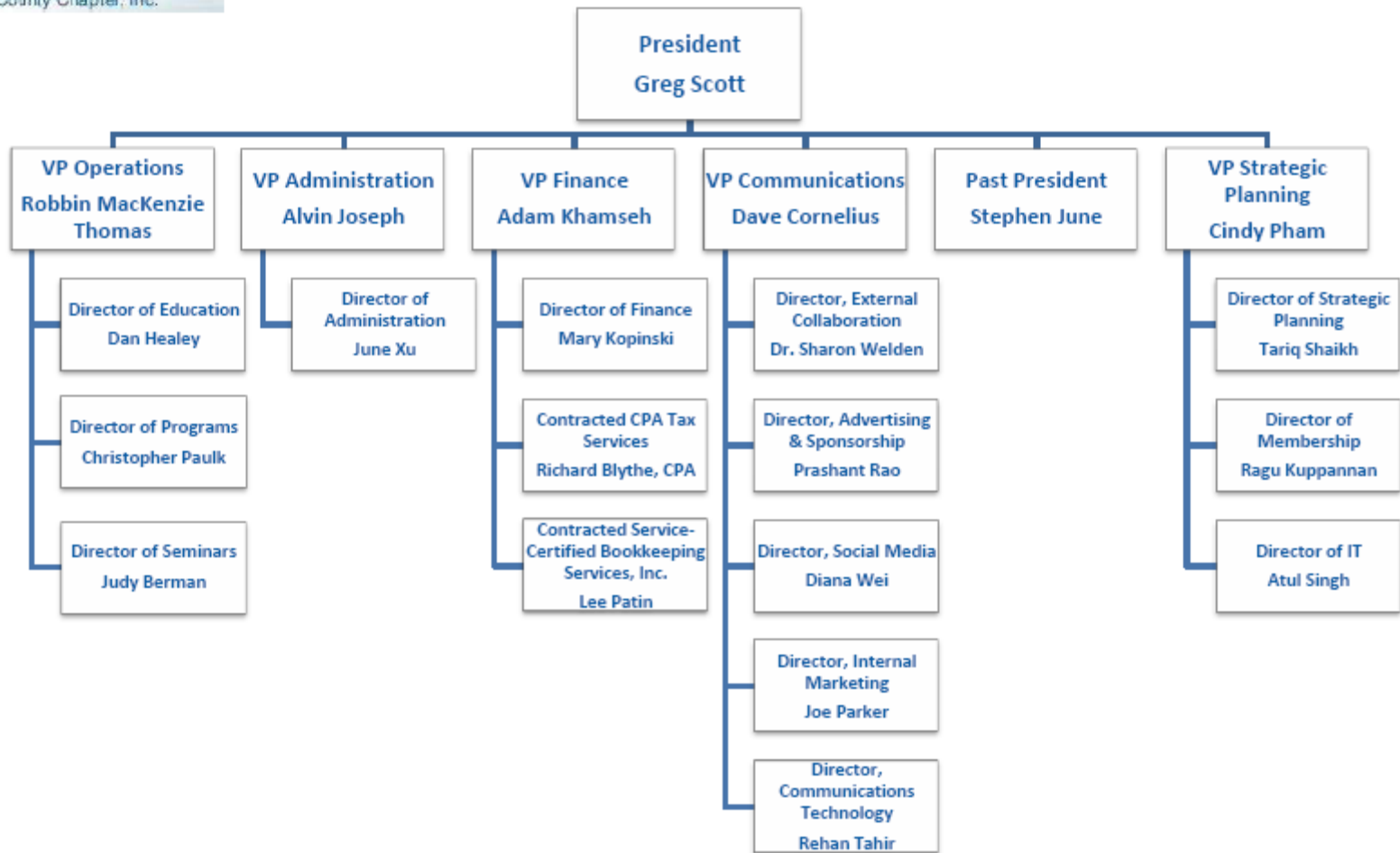
- 1651 Members as of 5/08/2012
- 1041 Project Management Professionals (PMP®)
- 11 Certified Associates in Project Management (CAPM®)
- 5 Program Management Professional (PgMP®)
- 3 Project Management Institute Scheduling Professional (PMI-SP®)
- Chapter growth has been relatively flat for the last two years
- Our retention rate is in line with other chapters



## What did we accomplish in FY11-12?

- Established a working strategic model to grow the chapter
  - Dedicated Volunteer Directors to carry out the daily tasks of running a chapter
  - Concluded our Second election with more candidates than positions
  - Completed Phase 1 of Operations Manual Update.
  - Established a whole new PMP Class Team





## What did we accomplish in 2011?

- Re-energized the monthly dinner team to provide increased member value.
- Conducted 3 PMP Prep Workshops
- Added “Happy Hour” networking events.
- Conducted 10 Advanced Topics Seminars
- Successful annual Career Event with focus on career development.
- 11<sup>th</sup> Annual Sotec Sponsorship exceeding attendance expectations
- Continued enhanced Quarterly Post Card mailing of upcoming chapter events



## What did we accomplish in FY11-12?

- Conducted Agile Education Programs
- Dale Carnegie Program
- PM Online Self Paced Course offering
- Identified the Project of the Year
- Selected the Volunteer of the Year
- Honored 10 Volunteers of the Month
- Re-energized Ambassador program
- **Increased Volunteer Participation in all organizations!**



# Chapter Financials 2011-2012



## ASSETS

Cash Accounts \$ 122,303

CD's \$ 116,347

**TOTAL ASSETS \$ 238,650**

## LIABILITIES AND EQUITY

Total Credit Cards \$ 98.90

Total Liabilities \$ 98.90

### Equity

Retained Earnings \$ 139,628

Unrestricted Net Assets \$ 91,127

Net Income \$ 7,796

Total Equity \$ 238,551

**TOTAL LIABILITIES AND EQUITY \$ 238,650**





# Chapter Financials 2010-2011

## ■ SUMMARY

- The chapter is very sound financially
  - We have over \$238,000 in liquid assets
  - We have no long-term debt
  - In spite of a bad economy, we posted a net increase of \$7,796.
  - Embarking on major infrastructure improvement initiatives.

# Financials FY11-12, Budget FY12-13

## Income \$235K, Expenses \$221K

Chapter Function	Type	FY11-12 Actual	FY12-13 Operational Budget	FY12-13 Initiatives
<b>Education</b>				
	Expenses	-26,163	-21,550	0
	Income	75,199	91,000	
<b>Education Total</b>		<b>49,036</b>	<b>69,450</b>	<b>0</b>
<b>Marketing</b>				
	Expenses	-41,435	-54,568	-2,500
	Income	10,250	15,885	
<b>Marketing Total</b>		<b>-31,185</b>	<b>-38,683</b>	<b>-2,500</b>
<b>Overhead</b>				
	Expenses	-61,553	-79,315	-17,750
	Income	60,719	60,500	
<b>Overhead Total</b>		<b>-834</b>	<b>-18,815</b>	<b>-17,750</b>
<b>Programs</b>				
	Expenses	-53,096	-66,200	-225
	Income	43,875	56,000	
<b>Programs Total</b>		<b>-9,221</b>	<b>-10,200</b>	<b>-225</b>
<b>Grand Total</b>		<b>7,796</b>	<b>1,752</b>	<b>-20,475</b>



## Budgeted Initiatives for FY12-13



- Committing \$20K of Reserves, less than 10%
- Focus on improved Chapter Infrastructure
  - Apply Cloud Based CRM to Volunteer Management functions, potential for Marketing functions
  - Upgrade and/or Replace Web Platform and Registration System
- Expand internal and external Marketing
  - License Hoover's for business outreach
  - Outreach program to key business leaders



## What will we accomplish in FY12-13?

- Increase value of the monthly meeting
  - Our main event where we make contact with new members, returning members and support our volunteers
    - Maintain high quality of the speakers, networking capabilities, and “takeaways” from the event
    - We will improve the delivery of the dinner meeting (food, ambiance, networking, etc.)
    - Consider alternative formats

## What will we accomplish in FY12-13?

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- Initiate new programs that provide significant value to the members
  - Continue Agile Training Course in cooperation with an outside vendor
  - A PMBOK-aligned Workshop to increase the knowledge of our more experienced members
  - Launch new mentoring program
  - Increase marketing efforts for our programs and education through all media.

## What will we accomplish in FY12-13?

- Provide 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
- Complete the enhanced Volunteer Recognition Program, which actively acknowledges and rewards volunteer participation



## What will we accomplish in FY12-13?

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- Focused Objectives on organizational maturity
  - Perform Maturity Assessment
  - Phase 2 of Operations Manual Update
- Enhance the operational effectiveness of our Strategic Model
  - Publish a Strategic Score Card
  - Publish Project and Initiatives Status
  - More Productive Process

## What will we accomplish in FY12-13?

- Increase use of our social networking presence
- 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
- Consider additional outsourced administrative functions.





## Our Organizational Strengths!



- We have a vision, needs improved communication
- 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's missing to succeed?

- Recruiting and enabling our Volunteers
  - The Governors and the Directors can't do it by themselves.
  - Leadership Development, Training
- New and Fresh Ideas
  - What do you want from your chapter that we have not already identified from your input?
  - Where are our 1,000+ members we don't see, demographics, what can we offer them?

## Questions?

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

