DALLAS CHAPTER

PMI Dallas Chapter

Strategic Plan 2013



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Acknowledgements

The ideas and content of this document were contributed by members of the PMI Dallas Chapter Board of Directors. Their vision and passion is gratefully acknowledged.

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1 Executive Summary

The Project Management Institute (PMI) is the leading global organization for project management professionals.

The PMI Dallas Chapter is one of the top ten PMI chapters in the world, as measured by membership level. The chapter offers many benefits, including world class speakers, meaningful networking opportunities and options to support professional certification.

In 2013, the chapter plans to focus on three primary business objectives:

1. Increase level of engagement with project management practitioners

2. Provide outreach to build awareness of the value of project management

3. Continuously improve PMI Dallas Chapter operations

Financial Highlights

The chapter receives income from fundraising activities such as education classes, professional development events, membership dues and vendor promotions. Expenses include costs for the chapter to operate and sponsor member activities and benefits, such as the monthly dinner meeting, the annual Vendor Showcase, student scholarships and volunteer appreciation events. The financial goal of the organization is to cover all expenses each year and maintain a fiscally responsible level of operating reserve.

Organization

The Board of Directors is comprised of an all volunteer group of professionals committed to managing the organization and promoting its success. The board includes a president, nine vice presidents and one past-president. An Education Foundation Liaison role also assists the chapter, and reports to the president.

Each area is staffed with volunteers who, together with the board, provide the services that benefit our members. The chapter values these volunteers, and strives to ensure that both volunteers and the chapter realize the full benefits from their dedication.

The PMI Dallas Chapter board, volunteers and members working together can achieve our vision. We look forward to a fabulous 2013!

2 Organization Summary

2.1 Project Management Institute

The Project Management Institute (PMI), formed in 1969, is the leading global organization for project management professionals, with more than 250 Chapters in 70 countries. PMI is one of the fastest growing professional organizations in the world (10-15% annual growth).

Chapters provide programs and services for PMI members in specific geographic locations. There are more than 250 chartered chapters in four regions - North America, EMEA (Europe, the Middle East, and Africa), Asia Pacific and Latin America.

2.2 Chapter Overview

Chartered in 1984, the PMI Dallas Chapter has grown to be one of largest chapters in the world.

The Dallas Chapter is a volunteer driven, not-for-profit organization, run by volunteers and managed by a Board of Directors that is elected by the chapter membership.

The Chapter focuses on project management education, member growth and corporate involvement.

2.3 Vision, Mission

Vision

The PMI Dallas Chapter will be recognized as the professional organization and resource of choice for project management within the Dallas area.

Mission

To support the **growth and development** of project management practitioners;

as well as **build awareness** of the project management discipline and its critical role in business and organization success.

2.4 Member Benefits

The PMI Dallas Chapter offers members several benefits and services, including:

PMI Dallas Chapter Member Benefits

1. Discounts to chapter activities (including free admission to annual Vendor Showcase)
2. Online job listings
3. Acceptance into the chapter's LinkedIn Group
4. Personal assistance with PMI/PMP/PDU issues (provided by Chapter leadership)
5. Monthly newsletter announcing chapter, region and SIG events
6. Opportunities to contribute to profession by volunteering

Services Provided by PMI Dallas Chapter

- Monthly dinner meetings:
  - Networking with fellow professionals
  - Networking with potential employers/employees
  - Education on relevant topics
- Prepayment discounts for online event registration
- Quarterly PMP Exam Review
- Quarterly PM Training
- Professional development events with nationally recognized speakers
- Annual Vendor Showcase featuring project management vendors
- Connections with other PMI chapters & COPs to ensure quality of member services and communication path to members
- Continual plans for improvement through volunteer involvement

Additionally, there are standard benefits available to all PMI members. For a complete list of PMI benefits, see the Appendix

2.5 Communities of Practice

Communities of Practice (COP) are knowledge-driven websites where members can engage through blogs, wikis, discussion boards, shared document areas and opinion polls

- There are currently 36 communities, including:
  - Agile
  - Consulting
  - International Development
  - Organizational Project Management
  - Project Human Resource Management
  - Project Management Global Sustainability
  - Retail
  - Utility

3 Objectives for 2013

3.1 Primary Business Goals

The PMI Dallas Chapter Board of Directors has set high level goals for the next year.

1. Increase level of engagement with project management practitioners

2. Provide outreach to build awareness of the value of project management

3. Continuously improve the PMI Dallas Chapter

3.2 Objective 1: Increase Engagement

Increase level of engagement with project management practitioners

To increase engagement with project management practitioners, there are two groups of focus:

1. Individual Members and Non-members
2. Project Management Institute and related organizations

Objective: Increase collaboration with other chapters to share, learn and grow

Benefits

Increasing the level of engagement should have the following benefits to volunteers and the chapter:

- Increased value to the PMI Dallas Chapter
- Increased value as employees and more employable
- Increased value and contributions to PMI

Activities for each of these groups are outlined below.

Group/ Activity	Target or Deliverable
I. Increase Engagement	
A. Members and Non-members	
1. Promote and recruit new members for the chapter	Target: 4,200 Members
2. Improve retention rate	Target: Increase by 1%
3. Actively involve existing members in the Chapter	Target: 3 pt increase on % of members attending an event during the year
4. Provide information on member benefits and services	List posted on website
5. Participate and contribute to PMI Global / Chapters / Communities of Practice	Deliverable: Reports
6. Deliver COP promotion/awareness campaigns	Target: 3 COP events
7. Hold joint PMI chapter events (e.g.: with Fort Worth)	Target: 1 Joint meeting
8. Hold joint board event with Fort Worth Chapter	Target: 1 Joint board meeting
9. Lead an initiative with other chapters in the region	Target: 1 Regional event
10. Promote Region 6 services and volunteer opportunities to our chapter members	Target: 1 Regional initiative
11. Define and board approve plan for potential TWC exception for non-member training	Deliverable: Receive board decision on plan 11/29/13
12. Identify different meeting formats and locations	Deliverable: Feasibility study completed, presented to the board and decision made.
B. Sponsors	
13. Define the value of sponsorship (to Sponsors)	Deliverable: Create a survey to measure value.

Group/ Activity	Target or Deliverable
C. Vendors	
14. Reassess Vendor Showcase	Target: 20 Vendors, 400 Attendees
15. Promote PMI certifications through new agreements with vendors to provide certification training	Target: PMI Certification Training Vendor selection by 11/29/13
D. Volunteers	
16. Meeting to present strategic plan to directors	Target: Meeting in March 2013

3.3 Objective 2: Build Awareness

Provide outreach to build awareness of the value of project management

The PMI Dallas Chapter will strive to be recognized as a trusted and preferred information resource. The chapter will be seen as:

- Preferred information resource for project management and PMI
- Primary source of information for project managers (preferred conduit for jobs)
- Organization of choice for project managers

Target Audiences

Increase communications and PMI Dallas Chapter exposure by Target Audience:

Group/ Activity	Target or Deliverable
II. Build Awareness	
A. Corporations	
17. RCCs increase the PMI Dallas Chapter membership at their company	Target: 10% increase by 12/31/2013
18. Increase the number of RCCs to 42	Target: 42 by 12/31/2013
B. Members	
19. Report on digital communications measurements (web site hits, social media, email campaign, opens, click-thru rates). Set baseline.	Deliverable: Website activity report
20. Implement a program for personal recruiting	Deliverable: Recruiting process documented 12/31/2013
C. Non-Profit Organizations	
21. Establish a relationship with other professional organizations	Target: 3 professional organizations engaged
D. PMI Education Foundation	
22. Conduct 2 student/teacher outreach events	Target: 2 Events completed
23. Establish working relationships with higher education institutions (to enhance student awareness of the PM profession)	Target: 3 Universities engaged

3.4 Objective 3: Continuously Improve the PMI Dallas Chapter

Operational objectives are included to maintain and continuously improve chapter operations.

Group/ Activity	Target or Deliverable
III. Continuously Improve	
A. Operations	
24. Each area to set and manage to annual plan in their area	Deliverable: 3 initiatives identified for 2013
B. All	
25. Operations manual (Documentation, policies and procedures)	Deliverable: Operations Manual for each area
26. Develop KPI's for each area	Deliverable: A KPI developed for each area
C. Volunteers	
27. Leadership development program – training and grooming	Target: 5 directors have taken a development class
28. Improve collaboration across functions in the organization	Deliverable: Have comprehensive roles and responsibilities for each group.
D. Marketing	
29. Develop organization-wide marketing plan	Deliverable: Marketing Plan created and approved by board by 12/31/13
30. Streamline sponsor process (central)	Deliverable: Develop a comprehensive sponsorship document.

4 Board of Directors - 2013



Larry Johnson, PMP, President



John Cole, PMP, Past President



Ginan Kalenik, PMP, VP Operations & Support



Susan Kennedy, PMP, VP Professional Development



Colleen Drabek, PMP, VP Education



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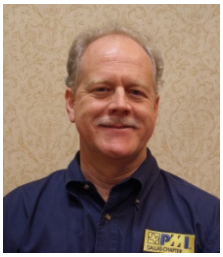
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Kane Wai, PMP VP Programs



Glen Milsap, PMP, VP Finance



Lon Crozier, PMP, VP Membership

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Appendices

A. Activities and deliverables

	Group/ Activity	Target or Deliverable	Primary Lead	Date	President	Operations	Finance	.Prof. Dev	Marketing	Education	Applied PM	Communication	Membership	Programs	Past President	PMIEF Liaison
	I. Increase Engagement															
	A. Members and Non-members															
1	Promote and recruit new members for the chapter	4200 members	Membership	31-Dec-13	S	S	S	S	S	S	S	S	P	S	S	S
2	Improve Retention Rate	Increase by 1%	Membership	31-Dec-13	S	S	S	S	S	S	S	S	P	S	S	S
3	Actively involve existing members in the chapter	3 pt increase on % of members attending an event during the year.	Programs	31-Dec-13										P		
4	Provide information on member benefits and services	List posted on website	Membership	31-Dec-13					S			S	P	S		
5	Participate and contribute to PMI Global / Chapters / Communities of Practice	Reports	Applied PM	31-Dec-13	S	S	S	S	S	S	P	S	S	S	S	S
6	Deliver COP Promotion/Awareness Campaigns	3 COP events	Applied PM	31-Dec-13					S		P					
7	Hold joint PMI chapter events (e.g.: with Fort Worth)	1 Joint meeting	Programs	31-Dec-13	S	S		S		S				P		

	Group/ Activity	Target or Deliverable	Primary Lead	Date	President	Operations	Finance	.Prof. Dev	Marketing	Education	Applied PM	Communication	Membership	Programs	Past President	PMIEF Liaison
8	Hold joint board event with Fort Worth Chapter	1 joint board meeting	President	31-Dec-13	P											
9	Lead an initiative with other chapters in region	1 Regional initiative	President	31-Dec-13	P	S	S	S	S	S	S	S	S	S	S	S
10	Promote R6 services & volunteer opportunities to our chapter members	1 Regional initiative	Applied PM	31-Dec-13		S	S	S	S	S	P	S	S	S	S	S
11	Define and Board Approve plan for potential TWC exception for non-member training	Receive board decision on plan 11/29/13	Education	29-Nov-13	S	S	S	S		P						
12	Identify different meeting formats & locations (Feasibility study)	Feasibility study completed (presented to the board and decision made).	President	31-Dec-13	P	S	S							S		
	B. Sponsors															
13	Define value of sponsorship (to Sponsors) as a baseline	Create a survey to measure value.	Marketing	31-Dec-13		S	S	S	P	S		S		S		
	C. Vendors															
14	Reassess focus of Vendor Showcase 2014	20 Vendors, 400 Attendees	Programs	31-Dec-13		S		S	S			S		P		
15	Promote PMI certifications through new agreements with vendors to provide certification training	PMI Certification Training Vendor selection completed 11/29/13	Education	29-Nov-13						P						

	Group/ Activity	Target or Deliverable	Primary Lead	Date	President	Operations	Finance	.Prof. Dev	Marketing	Education	Applied PM	Communication	Membership	Programs	Past President	PMIEF Liaison
	C. Volunteers															
16	Meeting to present strategic plan to directors	Meeting scheduled in March 2013	Programs	28-Mar-13		P										
	II. Build Awareness															
	A. Corporations															
17	RCCs increase the PMI Dallas Chapter membership at their company	10% increase 12-31-2013	Marketing	31-Dec-13					P				S			
18	Increase the number of RCCs to 42	42 RCCs	Marketing	31-Dec-13					P				S			
	B. Members															
19	Report on digital communication measurements. (website hits, social media, email campaigns, opens, click-throughs). Set baseline.	Website activity report	Communications	31-Dec-13								P				
20	Implement a program for personal recruiting	Recruiting process document 12-31-2013	Membership	31-Dec-13				S	S				P			
	C. Nonprofit Organizations															
21	Establish a relationship with other professional organizations	3 Professional organizations engaged	President	31-Dec-13	P				S		S					
	D. PMI Education Foundation															
22	Conduct 2 student/teacher outreach events	2 Student/ teacher events Completed	PMIEF Liaison	31-Dec-13	S											P
23	Establish working relationships with higher education institutions (to enhance student awareness of the PM profession).	3 Universities engaged	PMIEF Liaison	31-Dec-13	S			S								P

	Group/ Activity	Target or Deliverable	Primary Lead	Date	President	Operations	Finance	.Prof. Dev	Marketing	Education	Applied PM	Communication	Membership	Programs	Past President	PMIEF Liaison
	III. Continuously Improve															
	A. Operations															
24	Each area to set and manage to an annual plan for their area	Annual plans, 3 initiatives identified for 2013	Operations, All	31-Dec-13	S	P	S	S	S	S	S	S	S	S	S	S
	B. All															
25	Operations Manual (Documentation, Policies, Procedures)	Operations manual for each area	Operations	31-Dec-13	S	P	S	S	S	S	S	S	S	S	S	S
26	Develop KPIs for each area	A KPI developed for each area	President	31-Dec-13	P	S										
	C. Volunteers															
27	Leadership Development Program / Training / Grooming	5 directors have taken a development class	Prof. Dev	31-Dec-13				P		S			S			
28	Improve Collaboration across Functions across the organization	Have comprehensive roles and responsibilities for each group.	Operations	31-Dec-13		P										
	D. Marketing															
29	Marketing Plan - Organization-wide	Marketing Plan created and approved by board by 12/31/2013	Marketing	31-Dec-13					P							
30	Streamline sponsorship process (central)	Develop a comprehensive	Communications	31-Dec-13								P				

B. PMI Member Benefits

1. Access to Members Area of the PMI Web site (for members only benefits)
2. Knowledge sharing and networking opportunities through PMI components and communities
3. Job search using Career Headquarters
4. Leadership and volunteer opportunities
5. Access to Project Management Body of Knowledge (PMBOK® Guide)
6. Access to PMI's Career Framework
7. Access to Membership in PMI Components
8. Access to PMI Member Community
9. Information and resources from the PMI Knowledge & Wisdom Center
   a) Access to discounted PMI book store
   b) Subscriptions to PMI periodical publications
   c) PM Network®, Monthly magazine with latest news and events
   d) PMI Today™ PMI's Monthly Newsletter
   e) Project Management Journal ® Quarterly research journal
   f) Leadership in Project Management annual publication devoted to enriching leadership skills
   g) PMI Community Post, bi-monthly e-newsletter
   h) PMP Passport, Quarterly e-newsletter sent to all PMP credential holders
10. PMI Members Discounts
    a) PMI Credential Exams and Renewals
    b) Seminarsworld and e-Seminarsworld education opportunities
    c) PMI Global Congresses and Research Conference attendance
    d) Access to many project management and business publications either free or at a discount

C. Organization Chart

