Project Management Institute
Los Angeles Chapter, Inc.

Strategic Plan for
2017-2020

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V1.0

PMI-Los Angeles Chapter Strategic Plan

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Introduction

The Project Management Institute Los Angeles Chapter (PMI-LA) is a not-for-profit 501(c)(6) Professional Association, and is a chartered chapter of the Project Management Institute (PMI). It is charged to maintain a Strategic Plan, and that plan must be aligned with that of the parent organization.

PMI's Strategic Plan can be found on their website and is linked in the footer. The indented sections throughout PMI-LA's Strategic Plan are copied or adapted directly from PMI's plan. They are included to ensure alignment and transparency.

Please note: throughout this document, we use the terms Mission and Vision. PMI's Strategic Plan instead uses Core Purpose and Envisioned Goal respectively.

Overview

> The Project Management Institute (PMI) has embraced a process which led to the completion of a long-range strategic plan for the organization. The process facilitated (a) PMI's identification of the future needs of members and customers, and (b) PMI's options for satisfying those needs.
>
> The PMI Board initiated strategic planning activities in September 2001. Subsequently in March 2002, the Board and senior staff met to consider strategic questions about the organization's future, and to continue the process of developing a strategic long-range plan. The original framework used for the discussion was a proprietary Tecker Consultants model of strategic judgments organized into four time-related horizons. During 2004, under the guidance of the Board Standing Committee in charge of Strategy Development, the PMI Board adopted a modified view of this framework which has helped them to identify the critical strategic plan elements. This framework is presented below.*

*Indented sections are copied/adapted from the 2012 PMI Strategic Plan
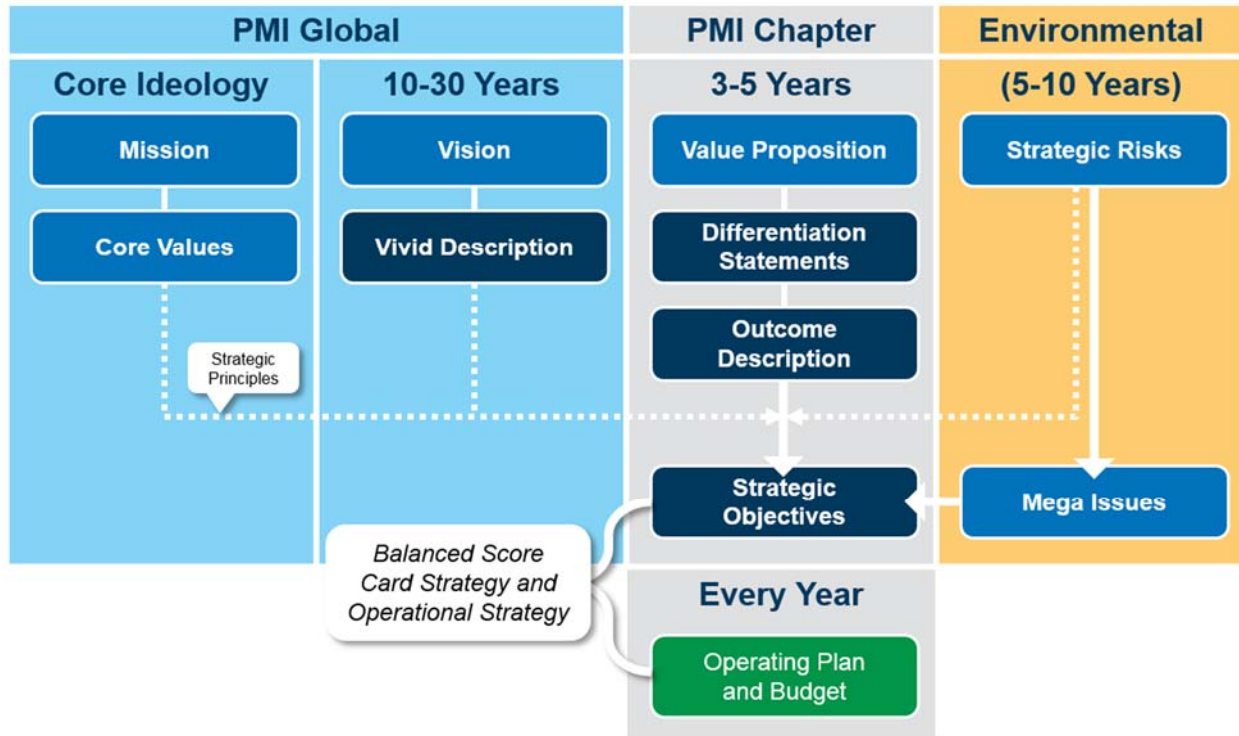
Each of the horizons focuses on a separate threshold of strategic dialogue:

- 10-30 Year Horizon - Consideration of factors in the long-range planning horizon, and the articulation of a mission, core values, and a vision;
- 5-10 Year Horizon - An evaluation of the environmental factors including risks (both threats and opportunities) that influence the future of PMI, the project management profession, and the business environment in which we operate;
- 3-5 Year Horizon - Long-range visioning articulated in goal statements with objectives that identify where PMI could be in the next several years and how it can get there. The vision attempts to focus on how the organization will provide beneficial outcomes to members and other stakeholders;
- 1-2 Year Horizon - Near-term operational strategy to implement the strategic direction. Focus is on action plans aligned to the outcomes delineated in the strategic plan.

This document is referred to as the "Working Strategic Plan." The title acknowledges it requires further, on-going, and specific attention by the PMI Board. The PMI Board will continue to refine the document as part of its annual strategic work.

PMI-Los Angeles Chapter Strategic Plan

The PMI-LA Chapter Strategic Plan is based on the same framework that our parent organization uses and has been modified to represent the merging of the two.

The content of the core, long-range elements, and Critical Success Factors (which they call Balanced Score Card Objectives) is set by PMI Global and is identical or nearly identical to ensure alignment between the two organizations. Strategic Risks and Mega Issues must be periodically assessed by the Chapter's Board of Directors but are not expected to change frequently.

Our Board of Directors serve one-year terms. Our short-range (3-5 years) strategic plan must be reviewed, updated as necessary, and approved each year by the serving Board. It is their responsibility to set objectives that serve our members and support PMI. This process is overseen by the Vice President of Strategy.

Core Ideology

> The core ideology describes the consistent identity of PMI that transcends all changes related to its relevant environment. Core ideology consists of two notions: **mission** – the organization's reason for being – and **core values** – essential and enduring principles that guide an organization.

Mission

To advance the practice, science and profession of project management throughout the greater Los Angeles area in a conscious and proactive manner.

Core Values

> PMI is driven by a clear mission and an underlying set of values that guide how we act and influence the expectations of our stakeholders. Even as a diverse organization, we share a common set of values. Our core values are not subject to changes in the association and business environment or dictated by trends in organization management. These values are fundamental and deeply held.

> As part of our core ideology, PMI's core values are enduring and are guiding principles upon which we act. At PMI we believe in:

> **Project Management Impact**
> Project management is a critical competence that has a positive influence on organization results and society.

> **Professionalism**
> Accountability and ethical behavior ensures our commitment to PMI stakeholders.

Volunteerism
Volunteers and effective volunteer partnerships with staff are the best way to accomplish the Institute's goals and objectives.

Community
Bringing members of the global project management community together is the best way to facilitate their growth and advance the project management profession.

Engagement
Encouraging diverse viewpoints and enabling individuals to contribute to the project management profession and to the Institute.

Strategic Principles

Strategic principles provide the foundation for sound, consistent and values-based decision making that PMI-LA needs to maintain its strategy and respond in a flexible manner to the changes in the needs of its stakeholders and in the global environment. They are not bound by one specific time horizon but are intended to influence strategy through development of all strategic plan elements.

PMI-LA has adapted the original strategic principles provided by PMI Global so that the scope is appropriate to a chapter.

1. PMI-LA shall use best business practices whenever possible.

2. PMI-LA shall support all products and services with appropriate market research, a business case, and a life cycle management process.

3. PMI-LA shall involve the right subject matter expertise to ensure product quality and maximize appropriate use of intellectual capital while managing time-to-market needs.

4. PMI-LA shall primarily focus on activities/offerings that advance the practice of project management.

5. PMI-LA shall endeavor to enhance the careers, skills, and knowledge of practitioners, allowing them to develop more business insight to bridge the gap between projects and organizational/business strategy.

6. PMI-LA shall both anticipate and respond to market needs regarding any areas of specialization that PMI-LA may provide.

7. PMI-LA shall support organizations in creating an environment that accelerates both the implementation of strategy and achievement of organizational objectives through project management.

8. PMI-LA must demonstrate creativity, flexibility, and agility in accommodating the needs of its stakeholders in the greater Los Angeles area.

9. PMI-LA shall take actions and make decisions in a socially, environmentally, and economically responsible way.

10. PMI-LA considers the users of technology-based forms of congregation and communication (such as social media, websites, and knowledge portals) a strategic market and shall utilize technology as appropriate to reach this rapidly changing segment.

11. PMI-LA shall ensure that its relationships with other organizations support the global PMI brand.

12. PMI-LA shall advance the application of project management knowledge, concepts, and theory by society-at-large, including through active support of educational practices and dissemination of project management related educational information.

Long-Range (10-30 Years)

Envisioned Future

Envisioned future conveys a concrete, but yet unrealized vision for the organization. It consists of a **vision** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – vibrant and engaging descriptions of what it will be like to achieve the vision.

Vision

Individuals in the greater Los Angeles area will embrace, value, and utilize project management and attribute their success to it.

Vivid Description

1. Project management is a core competency for individuals.
2. Project management is visible and locally recognized as a profession.

Mid-Range (3-5 Years)

Value Proposition

A value proposition is a statement that clearly identifies the benefits that our stakeholders can expect from the Chapter. The Board has crafted the following as our value proposition:

Making Project Management Personal

Differentiation Statements

Differentiation statements help to distinguish the Chapter and our offerings from others.

Chapter members are able to connect to the largest community of project management practitioners in Los Angeles from diverse industries.

Chapter members have access to in-person training on essential career skills, including transitioning from one job to another and advancing your career using project management skills.

The Overall Strategy

A strategy is a plan of action to achieve a major or overall aim. In this context, the chosen strategy should enable us to achieve the strategic objectives below, reflect the other mid-range elements above, and further the mission of the chapter. The chapter's current overall strategy is:

Increase the sense of community among project management practitioners in Los Angeles.

Short-Term (1-3 Years)

PMI Global has sorted their strategic objectives in a balanced scorecard along four perspectives (which we call critical success factors).

Critical Success Factors

Critical success factors (CSFs) drive the strategy forward, and are critical to the success of the organization achieving its mission. Unlike objectives (which are achieved and then retired), CSFs are permanent elements in our strategic plan. They are reviewed for relevancy each year.

PMI-LA has adapted the four original critical success factors established by PMI Global:

Resources
Resources and assets needed to keep the doors open (finances, website, volunteers, governance documents, etc.)

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Culture and Capabilities
Processes, best practices; how we do things

Stakeholder Intimacy
Promoting engagement (for various levels of stakeholders), providing member value

Outreach
Promoting project management beyond practitioners

Strategic Objectives

Strategic objectives are specific goals that are chosen in pursuit of the chapter's strategy. The Board is limited to a maximum of 10 strategic objectives, and there should be at least one objective established within each of the critical success factors above.

Each objective must address a strategic need within the next three to five years (though it does not need to be achieved within that timeframe). The timeline and metrics are recorded in the table below, and a RACI Matrix is maintained by the Vice President of Strategy. The strategic objectives are reviewed at the beginning of each year and revised as necessary.

1. Establish a Volunteer Management Plan

CSF: Culture and Capabilities
Timeline: Start ASAP; duration 6 months
Metrics:

- 100% adoption of the Volunteer Management System (VMS)
- Monthly reviews and reports of VMS data by every Vice President
- All volunteer management processes documented and operationalized

Primary: VP of Membership
Secondary: President

2. Improve the Chapter's Technology

CSF: Resources
Timeline: Start ASAP; duration 9 months
Metrics:

- 100% volunteers have access to appropriate tools
- All tools administered by the Technology Team

Primary: President-Elect
Secondary: VP of Administration

3. Establish a Career Services Program

CSF: Stakeholder Intimacy
Timeline Start ASAP; duration 6-12 months
Metrics:

- At least three recruiters at every Flagship Meeting
- At least one recruiter at every Community Meeting
- Quarterly workshops to help members in transition
- Reach out to two hiring managers each month
- Jobs posted from at least 10 companies each month

Primary: President-Elect
Secondary: VP of Membership

4. Expand Membership Engagement

CSF: Stakeholder Intimacy
Timeline: Start now; duration 3-6 months
Metrics:

- Increase attendance by 20% at all chapter meetings
- Hold at least six networking events each year
- Increase overall membership satisfaction to 70%

Primary: VP of Membership
Secondary: VP of Programs

5. Develop a Program to Increase Awareness of Formal Project Management

CSF: Outreach
Timeline: Start 2018; duration 6 months
Metrics:

- Establish relationships with at least five local colleges and universities
- Participate in at least three community service events each year
- Hold at least six learning events at local companies each year

Primary: VP of Outreach
Secondary: VP of Membership