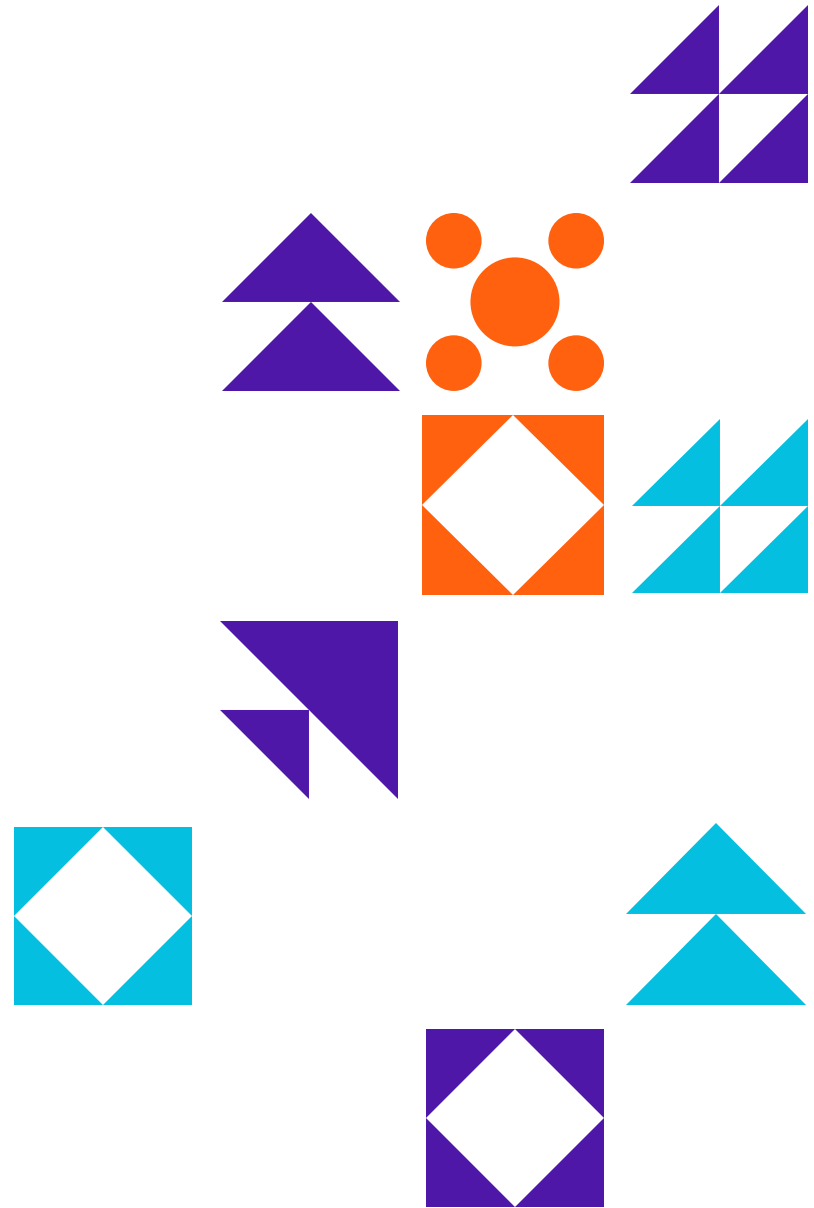Project Management Institute® Los Angeles

FLAGSHIP | 2023 ANNUAL BUSINESS MEETING

January 12, 2023

Presented by the PMI-LA 2022 and 2023 Board of Directors

Agenda

1
5:35 pm

2022 Chapter Business Summary
- Initiatives
- Engagement
- Finance

2
6:35 pm

What's new for 2023?

3
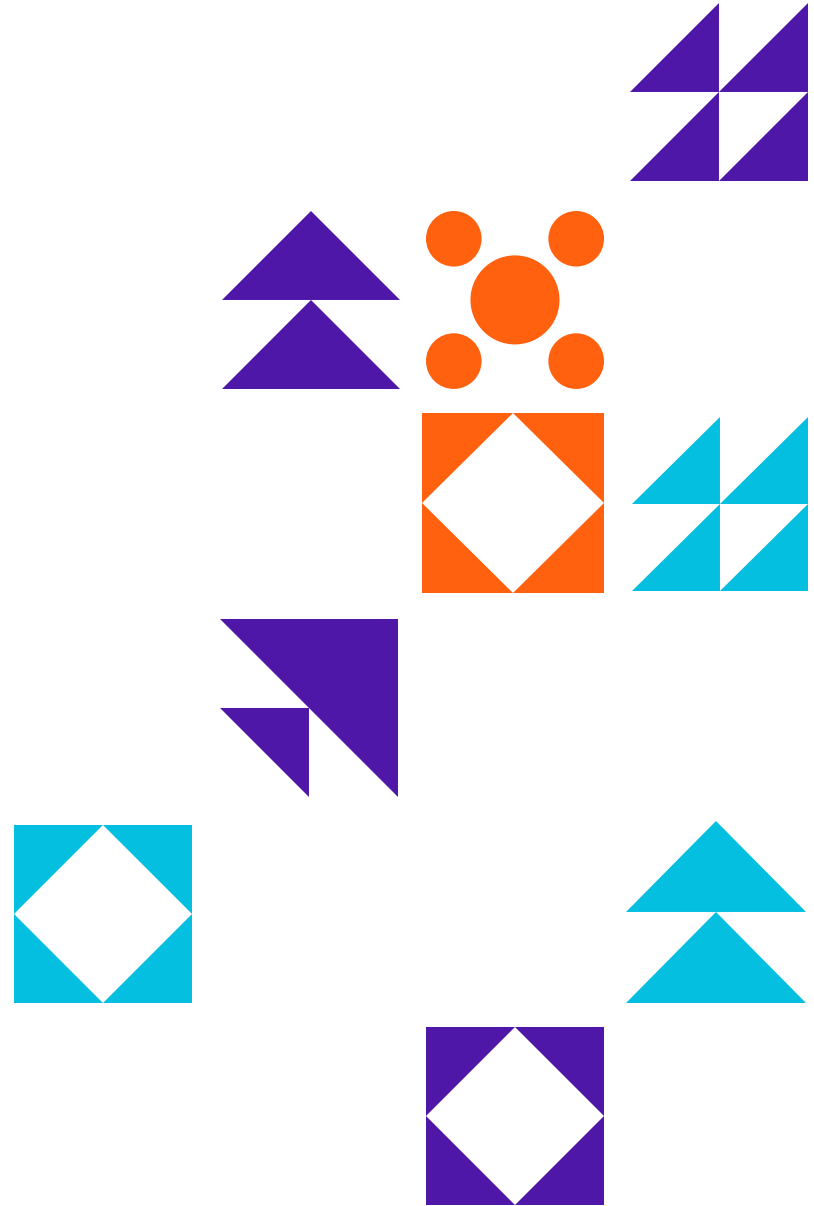7:10 pm

Breakout Rooms

4
7:25 pm

Closing

Welcome!

"Sunshine is a welcome thing. It brings a lot of brightness." — Jimmie Davis

2022 CHAPTER BUSINESS SUMMARY

January 12, 2023

Presented by Svetlana Averbukh, President,
and the PMI-LA 2022 Board of Directors

Inside and Outside Our Chapter

INITIATIVES

Flashback: 2022 Vision
President, Svetlana Averbukh

✅ Increase membership retention and growth
  - Increased from 1,730 to 1,832 members
  - Net increase of 102 members from January to December

✅ Attract and train millennials to volunteer leadership positions

✅ Chapter collaboration with other PMI Chapters
  - Programs, Career Development, and Networking events
  - 1 successful event with over 150 participants held by 5 different Chapters simultaneously

2022 Member Feedback
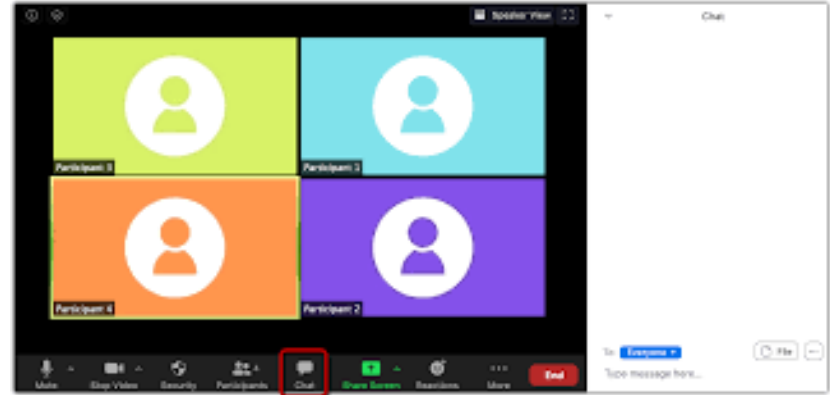
- Using the Zoom Chat feature, please enter your comments and feedback on how PMI-LA did in 2022.
- Please also share ideas on how we can better serve you.

VP Operations / President-Elect
Deby Covey

Responsibility: Ensure Chapter Operations adhere to current PMI-LA and PMI policies while gaining an understanding of all PMI-LA functions.

- ✅ Priority focus: Documentation and enhancement of Policies and Responsibilities Manual to ensure QuickStart for Volunteers and Board members – started onboarding documents and established master index for "How To" documentation

- ✅ Prepare 2022 volunteers for leadership roles in 2023 – held 2023 Strategic Meeting the day after the PMI Global Summit 2022 in Las Vegas

Acting VP of Finance
Deby Covey

✅ Re-establish the volunteers for Receivables and Payables

❌ Report PMI-LA finances monthly to Board of Directors

✅ Prepare a successor – Meeta Autrey will be coming back to the Board as VP in 2023

❌ Set the stage for an independent financial review

VP of PMO & Administration
Oliver Grant

❌ Introduce PMO
Create opportunities for volunteers to gain experience

✅ Maintain chapter assets – SharePoint and other forms of storage

VP of Technology
Richard Martinson

✅ Recruited for Technology Team – built the team out to a minimum of 4 members

✅ Implemented Webmaster of the Week Schedule to ensure Chapter website is constant

✅ Renewed contract for website host Dark Rhino

VP Marketing & Communications
Deby Covey

- ✅ Google Analytics Review of current new processes compared with 2 years ago – a new process was rolled out by Google and shared with team

- ❌ Search Engine Optimization (SEO) – learned about SEO but need to work on expanding on this

- ✅ Work with Membership on implementing a membership renewal campaign

- ✅ Continue to increase social media presence

VP of Career Development
James Jackson

✅ Career Employment events throughout the year
Academic Outreach • Mentorship Program • Brand and Land • You Are the Brand in Your Job Search • Continuation of the New Job Board

✅ Professional Development events throughout the year
PMP Certification Training • CSM Certification Training • 120 VC Transformational Leadership Program • Taking Control for Successful Project Delivery • How to Engage in Virtual Meetings • Turn On The Damn Camera • Presenting (and Selling) Virtually • JIRA Introductory Training • Bovard College Lecture Series • Scaled Agile Framework (SAFe) • Project Management in Supply Chains

✅ All Career Development activities remained virtual for all of 2022

VP of Programs
Alexandra Zhernova

✅ Resumed In-Person Flagship events

- Engaged Caltech keynote speakers (June, Sept, Nov)
- Secured Cambria Hotel LAX with pre-COVID ticket price $35 members / $40 non-members

✅ Launched new programs:

- Morning and Evening meetings
- Multi-Chapter events with the participation of 5 PMI Chapters across the U.S. (Inland Empire, Sacramento, Phoenix, Central Illinois, Baton Rouge)

✅ Developed hybrid solution for Pasadena meetings (Virtual with in-person events in May and December)

✅ Engaged a new Toastmasters Club (the Outliers)
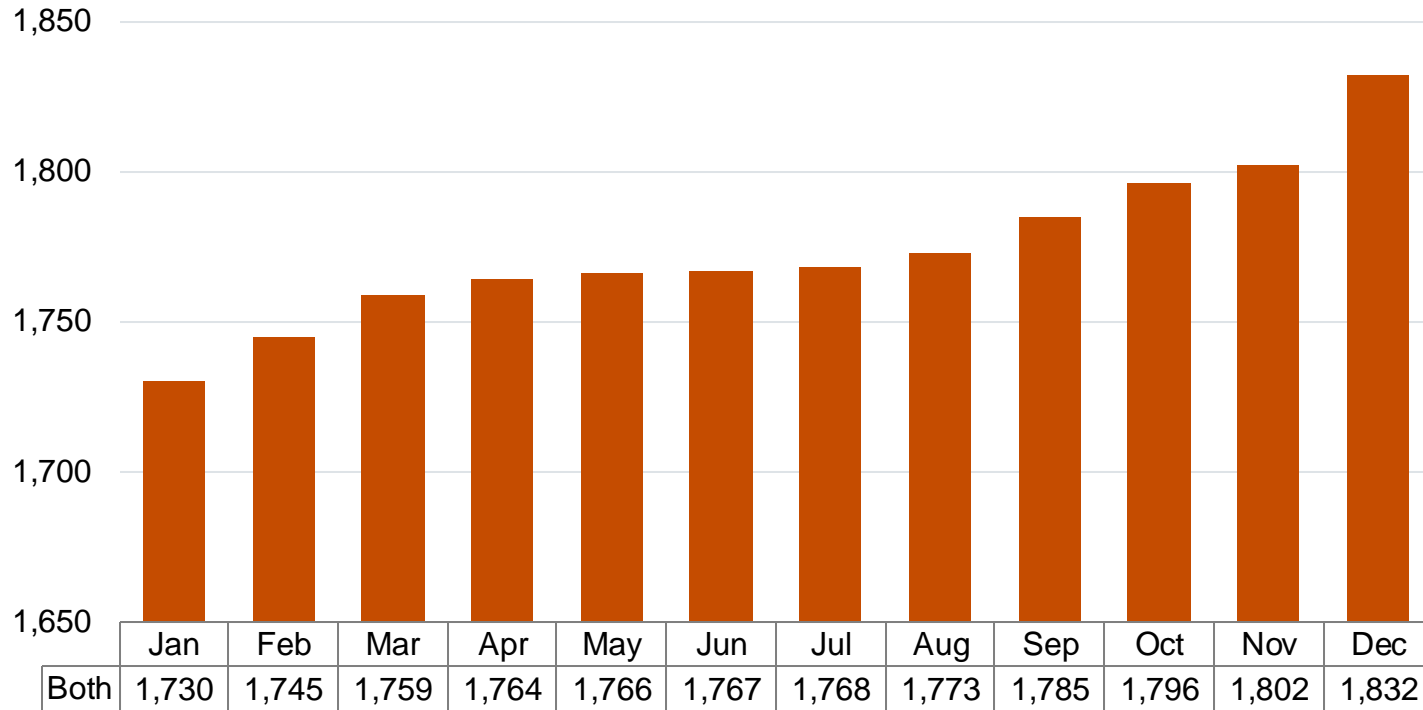
VP of Membership
Eric Brown

Planned 2022 Events

✅ Volunteer Recruitment – prepare the chapter for 2022 business – 2/23

✅ New Member Orientation – inform new members of chapter membership value – 3/23, 7/13

✅ Chapter Networking Events – Curiousity Coffee on 6/15

✅ Chapter EOY Volunteer Recognition Event – Scheduled for January 24, 2023

Inside and Outside Our Chapter

ENGAGEMENT

2022 Membership Numbers
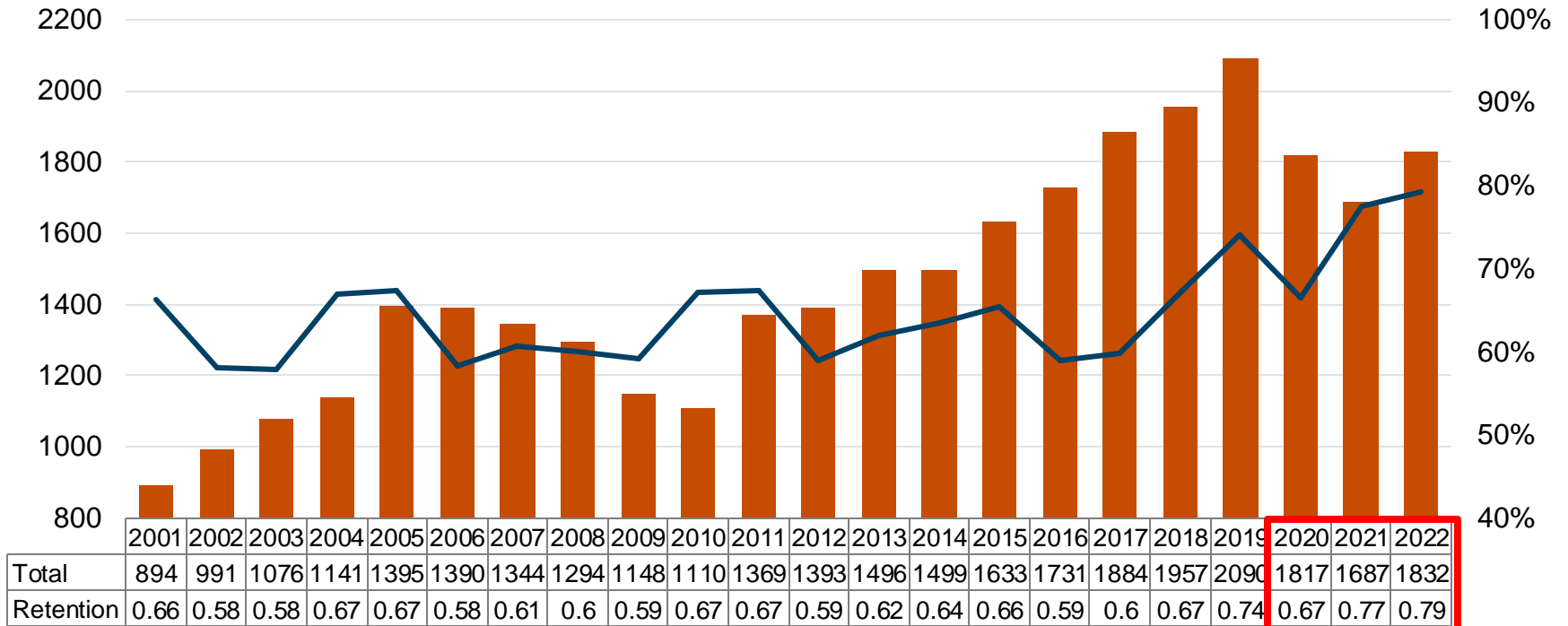

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Both	1,730	1,745	1,759	1,764	1,766	1,767	1,768	1,773	1,785	1,796	1,802	1,832

Historical Membership Numbers

Total Members and Retention Rate

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	894	991	1076	1141	1395	1390	1344	1294	1148	1110	1369	1393	1496	1499	1633	1731	1884	1957	2090	1817	1687	1832
Retention	0.66	0.58	0.58	0.67	0.67	0.58	0.61	0.6	0.59	0.67	0.67	0.59	0.62	0.64	0.66	0.59	0.6	0.67	0.74	0.67	0.77	0.79

Total   Retention

03/2020 – 06/2022 COVID Years – all virtual

End of Year Membership Certifications

658

1,110

61

69

66

- PMP
- ACP
- CAPM
- Other PMI Certifications
- No PMI Certifications
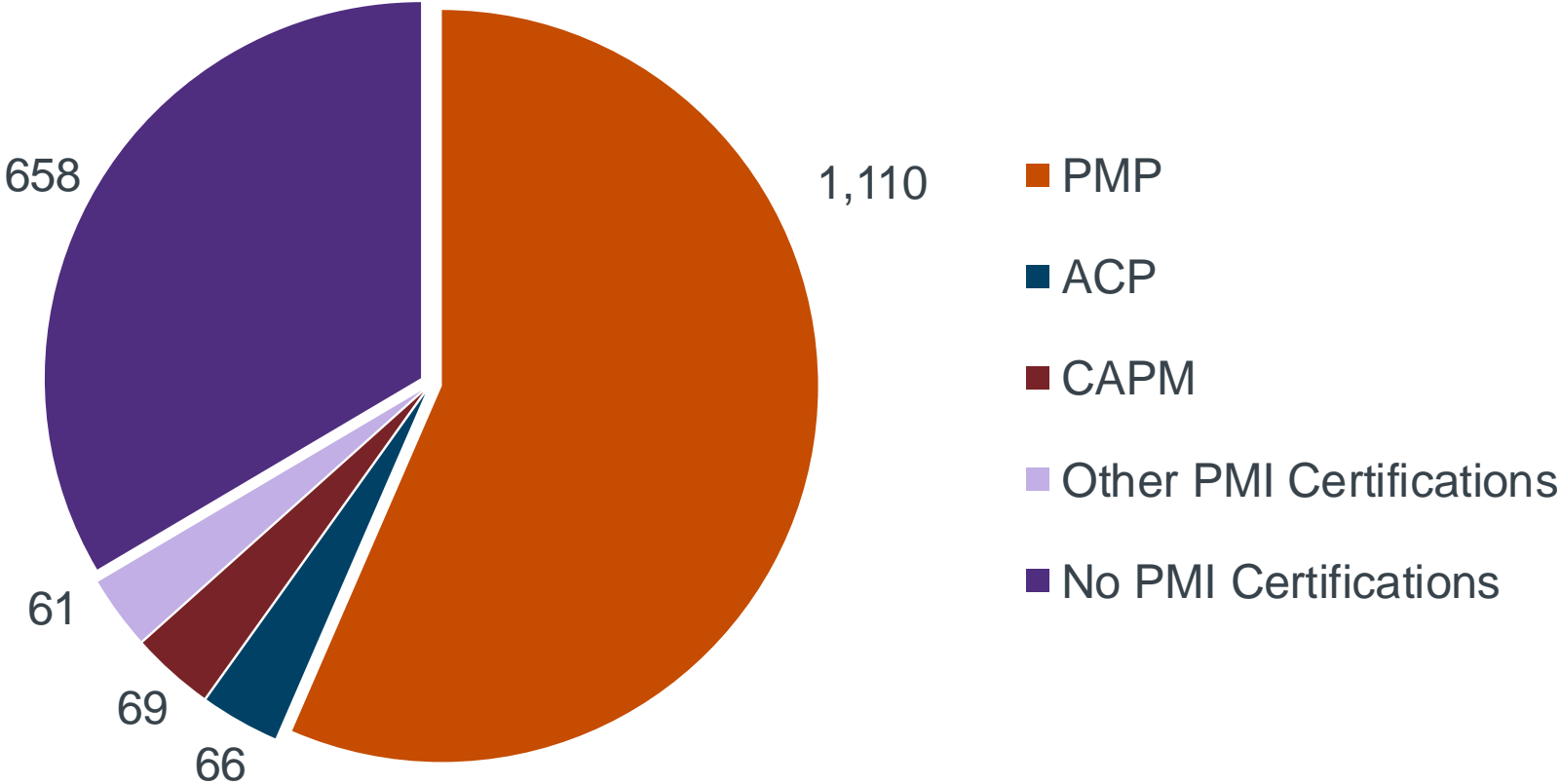
2022 Programs Registration

Program • V = Virtual • IP = In-Person	# of Events		# Registered Members		# of Registered Non-Members		Average # of Registered Members Per Event	
	V	IP	V	IP	V	IP	V	IP
Book Club	2	0	24	0	13	0	18.5	0
Evening Program	5	0	99	0	20	0	23.8	0
Flagship Program	1	3	65	89	14	20	79	36.3
Morning Program	3	0	41	0	6	0	15.7	0
Multi-Chapter Program	2	0	56	0	141	0	98.5	0
Pasadena Program	8	2	313	16	69	2	47.8	9
Webinar	9	0	109	0	28	0	15.2	0
Total	30	5	707	105	291	22	N/A	N/A

- The virtual Multi-chapter programs generated the most registrants per event (98.5) 2 events
- The virtual Pasadena Program generated 382 registrants / 10 events (47.8 per event)
- The Flagship Program has the highest in-person registrants (109).

Programs Comparison

Year · V = Virtual · IP = In-Person	# of Events		# of Registered Members		# of Registered Non-Members		Total	
	V	IP	V	IP	V	IP	V	IP
2020	28	5	961	119	67	8	1,028	127
2021	28	1	1,313	21	116	2	1,429	23
2022	30	5	707	105	291	22	998	127

Compared to 2021, in 2022 ...

- the total number of events (V + IP) increased from 29 to 35.
- there was an increase of 195 registered non-members.
- there was a decrease of 522 registered members.
- there was a decline of 431 total registrants for V events but an increase of 104 registrants for IP events, with an overall decrease of 327 registrants for both V and IP events.

Career Development Events

Career Development Event	Date	# of Members	# of Non-Members	Total
Career Development | Brand and Land (Multiple sessions)	2022	375	33	408
Mentorship Program	2022	32	0	32
USC Bovard College Lecture Series (Multiple sessions)	2022	24	6	30
Geoteaming Series (Multiple sessions)	2022	26	2	28
Project Management in Supply Chains	6/16/2022	7	0	7
Introduction to SAFe	8/18/2022	11	3	14
JIRA (Multiple sessions)	2022	63	4	67
Taking Control for Successful Project Delivery	6/25/2022	10	1	11
120 VC (Multiple sessions)	2022	7	0	7
You Are the Brand in Your Job Search	5/14/2022	5	0	5
Platinum Edge (Multiple sessions)	2022	TBD	TBD	TBD
		560	**49**	**609**

Career Development Comparison

Year	# events	Members	Non-Members	Total
2021	19	410	53	463
2022	43	560	49	609

- 2022 had 126% more events as well as continuous PMP, CSM, CSPO, Leadership sessions throughout the year

- Virtual Training due to COVID has been extremely successful for our members

Membership Event Registrations

Event	Event Date	Members	Non-Members	Total
PMI-LA 2022 Volunteer Recruiting	2/22/2022	30	0	30
PMI-LA Chapter Member Orientation Q1	3/23/2022	36	2	38
Curiousity Coffee	6/15/2022	15	1	16
PMI-LA Chapter Member Orientation Q3	7/13/2022	23	0	23
		104	**3**	**107**

Membership Event Comparison

Year	# events	Members	Non-Members	Total
2021	5	165	18	183
2022	4	104	3	107

- Virtual Meetings are well attended by members

2022 Snapshot

FINANCE

Financial Overview

	2021 Actuals	2022 Budget	2022 Actuals	Variance
Total Chapter Revenue	53,416	71,485	64,571	6,914
Total Chapter Expenses	25,908	72,120	37,314	34,806
Chapter Net	**27,508**	**– 635**	**27,257**	**41,720**

Current Assets as of Dec. 31, 2021	
Checking Account	$254,588
Investment Account	$149,727
CD's	$69,599
PayPal	$35,181
Total	**$509,095**

* Pending some income via checks that are not yet booked

2022 Revenue

$4,560

$4,691

$292

$50,938

- Membership
- Finance
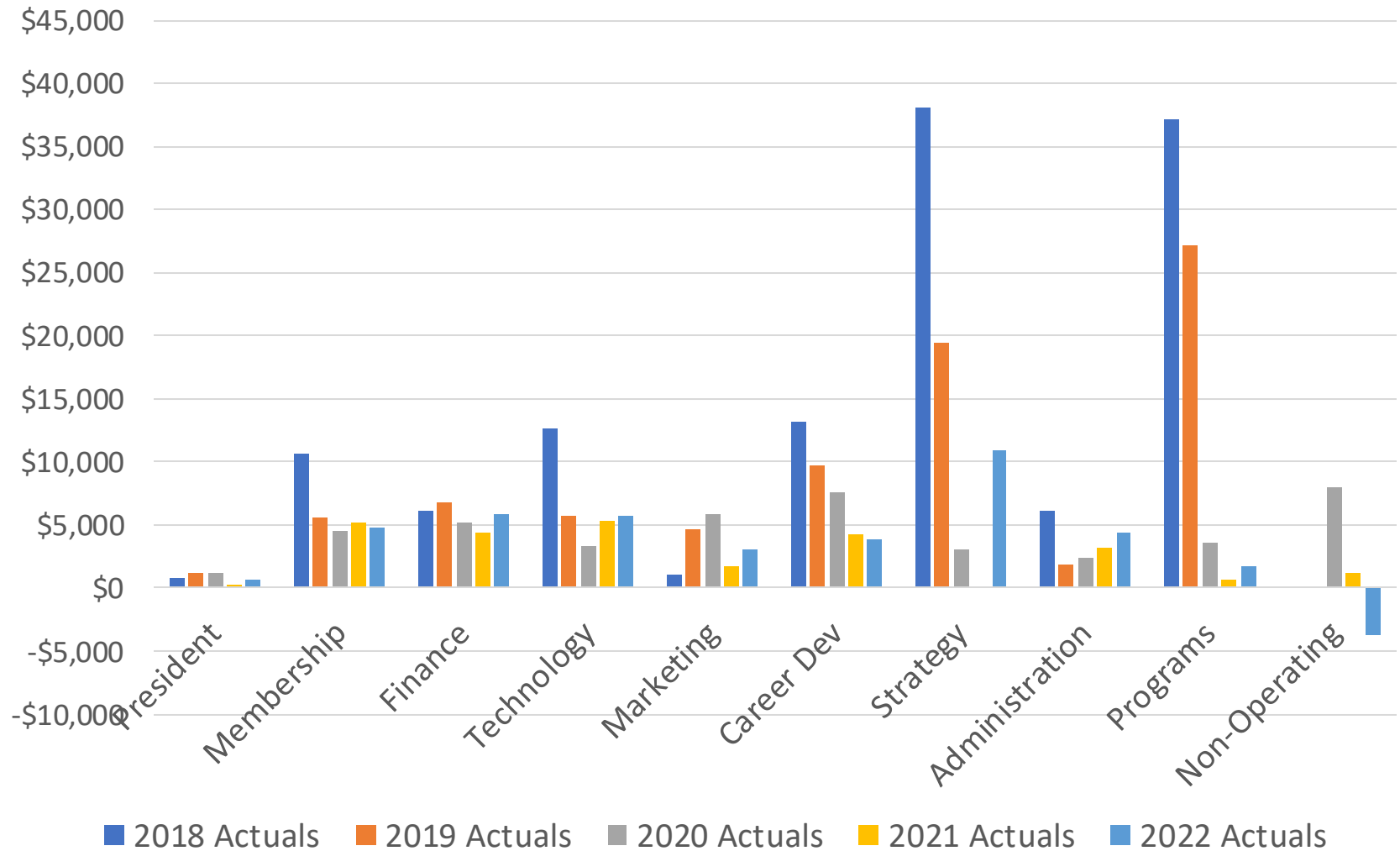- Career Development
- Programs
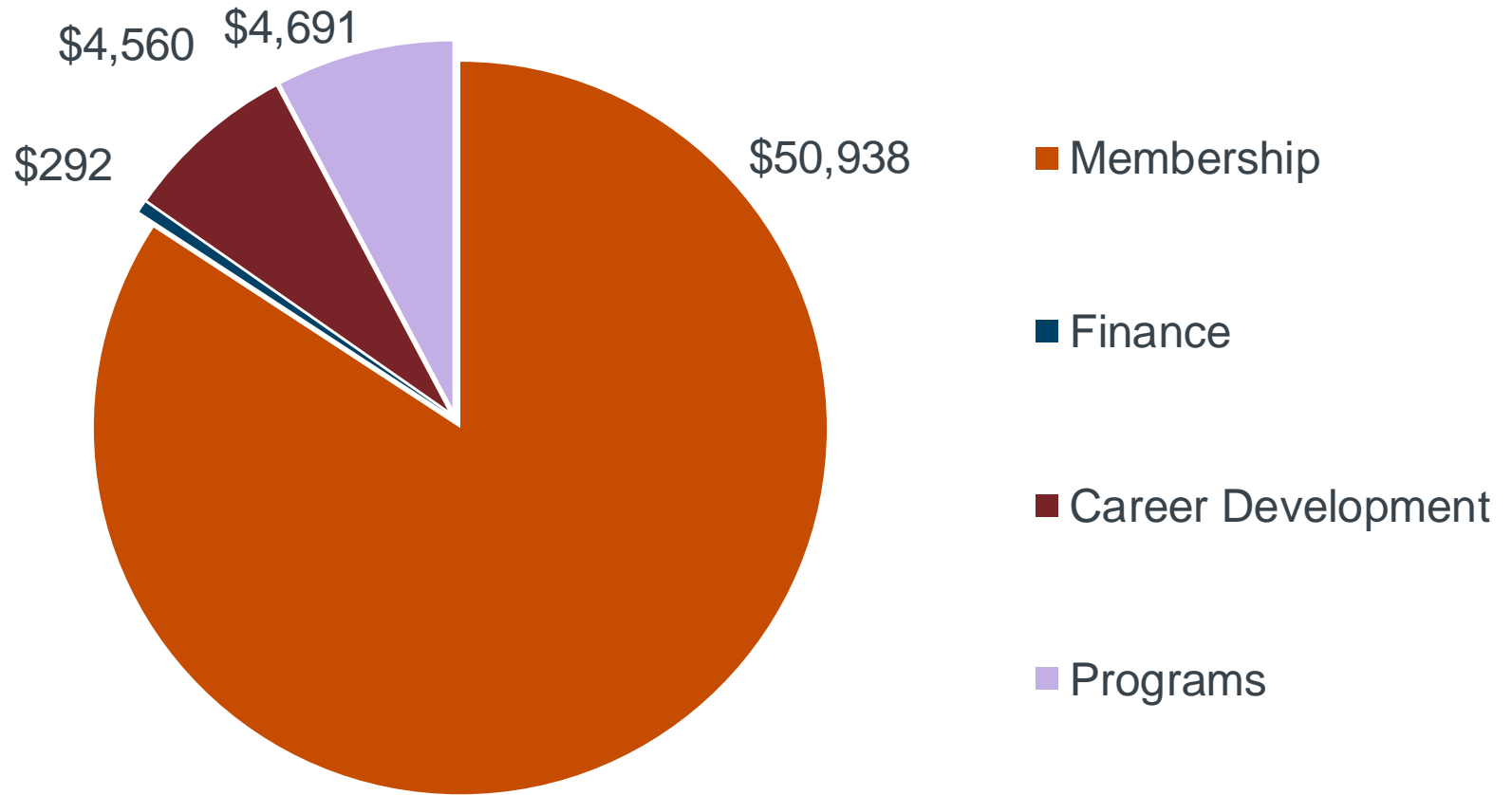
5-Year Trend: Revenue Trends by Portfolio

Los Angeles Chapter
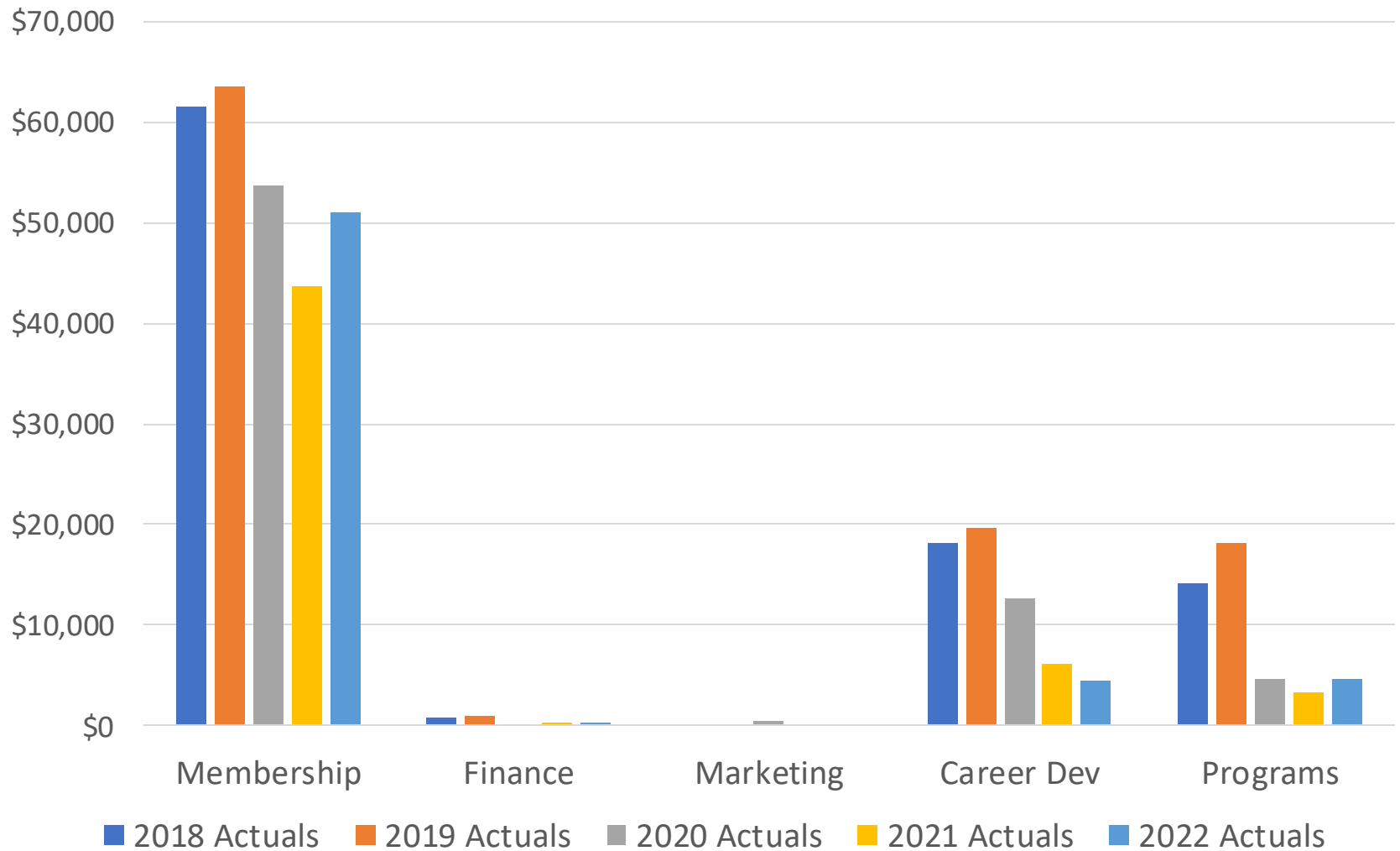
2022 Expenses
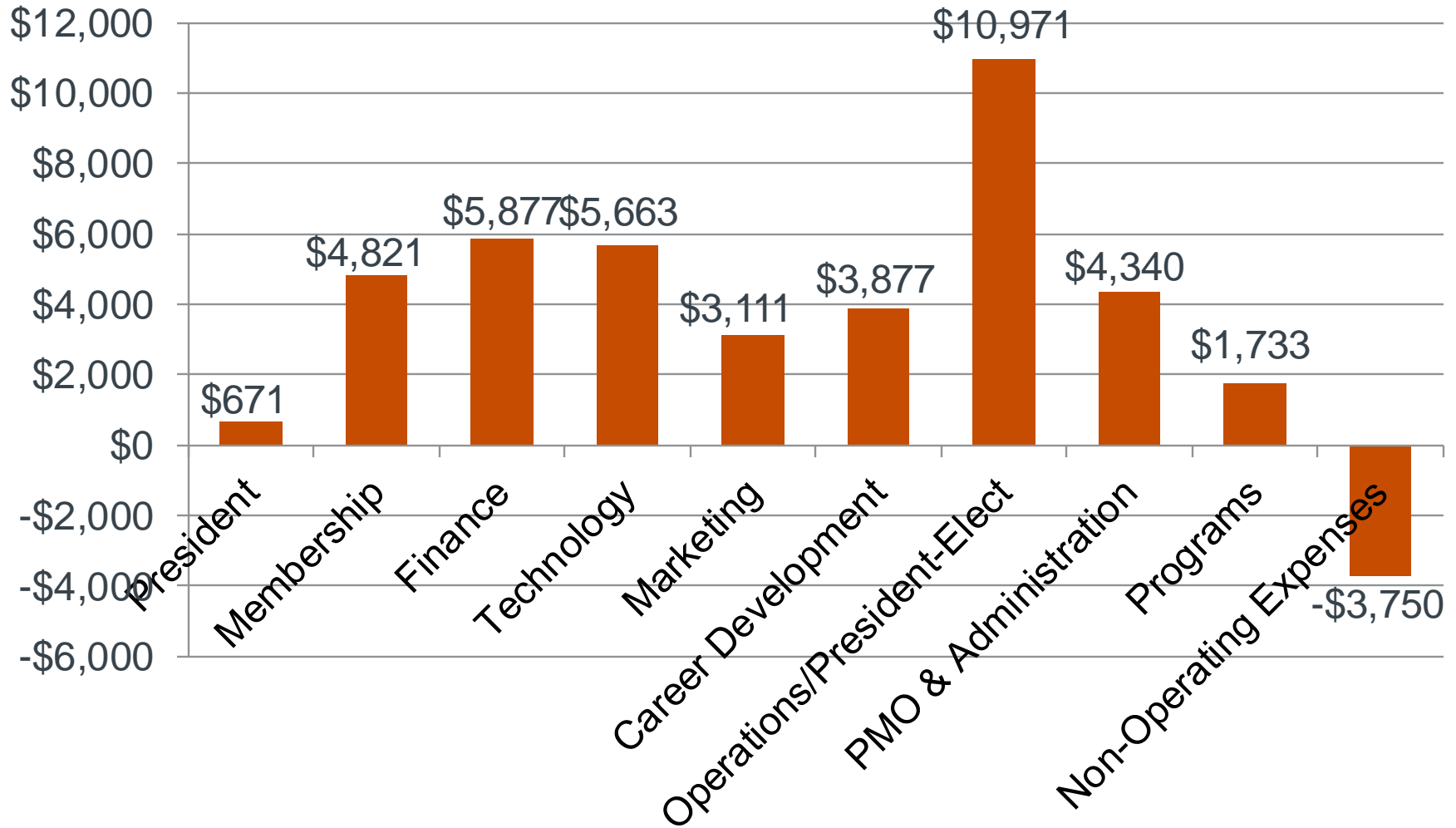
5-Year Trend: Expense by Portfolio

5-Year Chapter Financial Trends

Los Angeles Chapter

Where Your Dues Go

- Chapter Administration
- Membership
- Programs (Meetings)
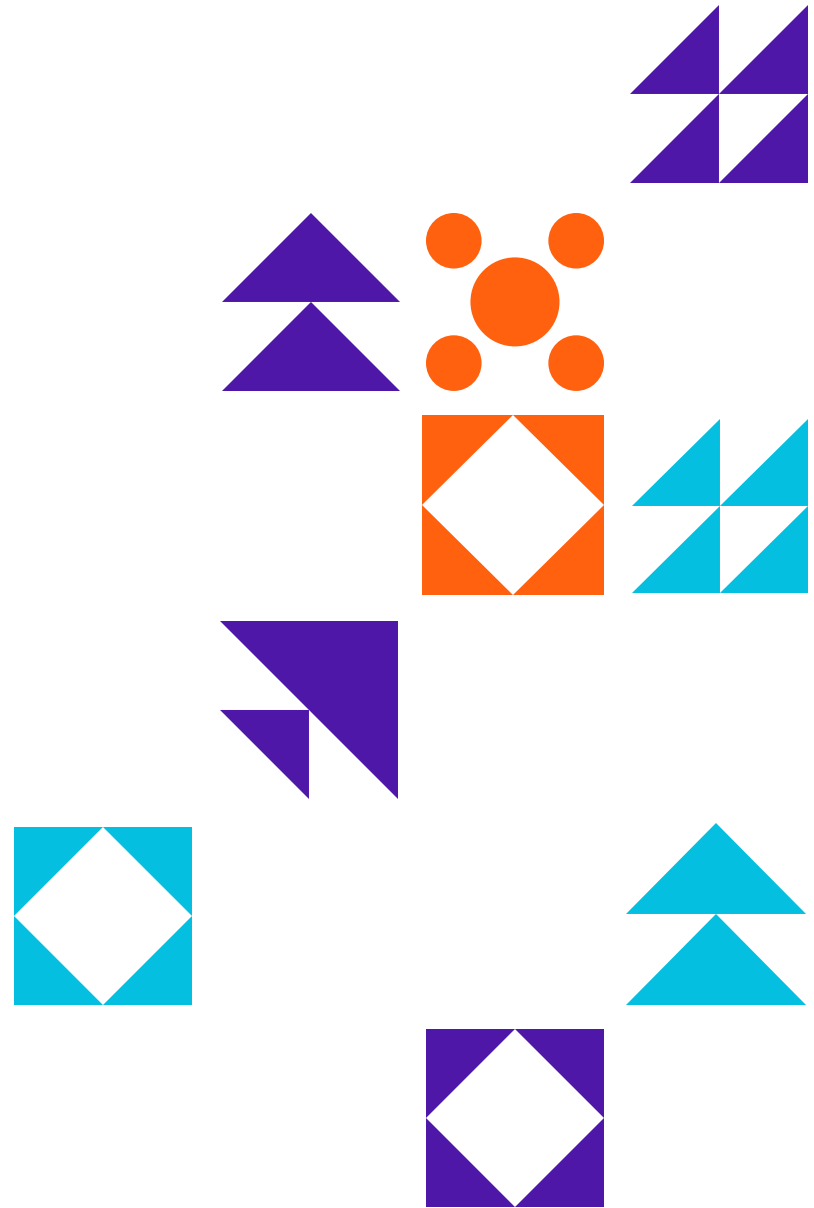- Career Development

17%
3%
21%
59%
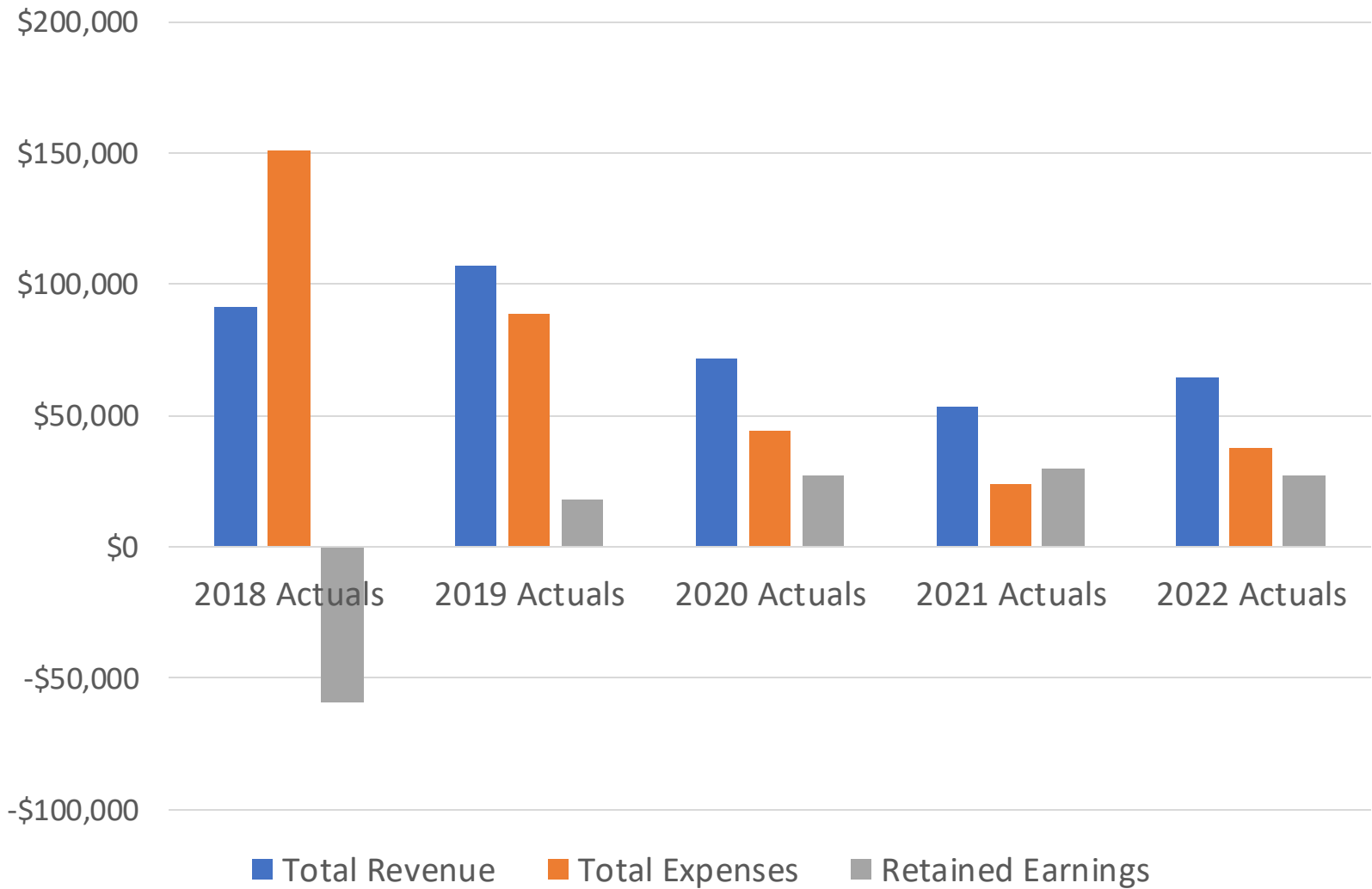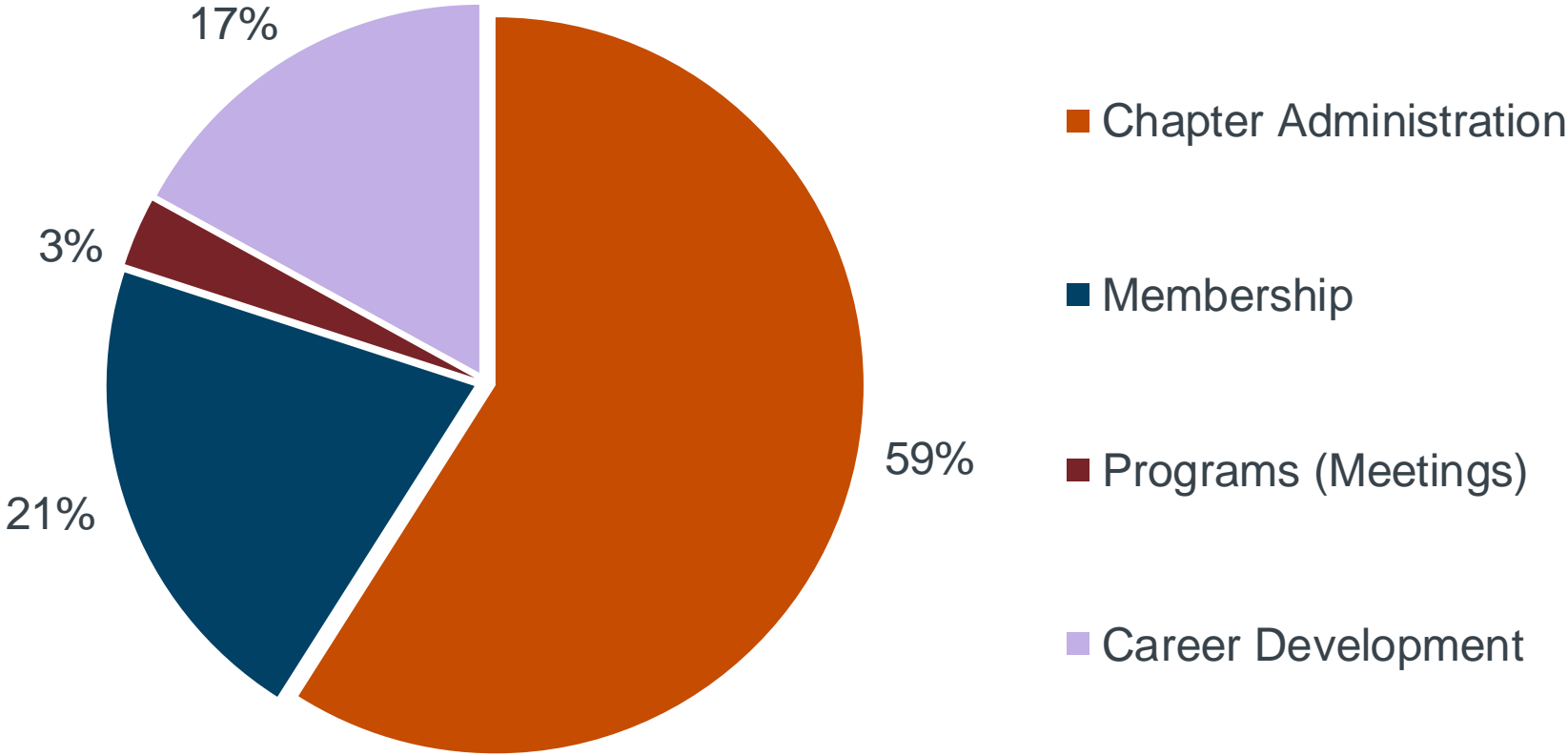
WHAT'S NEW FOR 2023?

January 12, 2023

Presented by Deby Covey, President,
and the 2023 PMI-LA Board of Directors

2023 Vision
President, Deby Covey

- Increase Membership through targeted marketing campaigns and corporate outreach

- Increase Membership retention through ongoing activities and in-person events throughout Los Angeles County

- Commitment to PMI Hours for Impact with a Partnership Program for all projects that adhere to the United Nations 17 Sustainable Development Goals (SDGs)

VP Operations / President-Elect
Alexandra Zhernova

Responsibility:

Ensure Chapter Operations adhere to current PMI-LA and PMI policies while gaining an understanding of all PMI-LA functions.

2023 Priorities

- Collaborate with the PMI-LA President on membership growth, retention, and social impact project

- Collaborate with PMI Chapters to implement best practices at the PMI-LA (focus on corporate outreach)

VP of Finance
Meeta Autrey

Responsibility:

Maintain and strengthen PMI-LA financial health.

2023 Priorities

- Membership growth & retention – Support the PMI-LA Board of Director by providing feedback on safe and sound practices towards implementation of their strategies

- PMI Hours for Impact – Be a champion towards the initiative for a successful impact to the Los Angeles area by finding opportunities to partner with members and their causes.

VP of Technology
Vick Madenian

Responsibility:

Ensure Chapter Technology keeps with current industry standards as well as manage access across chapter tools.

2023 Priorities

- Reorganize the PMI-LA Website backend systems efficiency in operations and ease of onboarding volunteers
- Work with the Programs & Career Dev teams for trainings and continuous improvement of efficiency and quality
- Maintain and update the PMI-LA Website to ensure timely and quality dissemination of Member and PM-Community relevant content provided by all departments
- Manage the administration of the PMI-LA Office365 tools

VP of PMO & Administration
Eric Brown

Responsibility:

Administrative maintenance of the chapter.

2023 Priorities

- Membership growth – Create opportunities for new volunteers to gain experience

- Retention – Work with experienced PMs to set up PMO Framework for Chapter

- PMI Hours for Impact – Introduce Project Management Framework for intake and measurement of Impact

VP of Marketing & Communications
Open

Responsibility:

Maintain and strengthen PMI-LA Marketing and Communications.

2023 Priorities

- Membership growth – Targeted campaigns and focus on Social Media to reach Project Managers not a part of PMI-LA

- Retention – Continue Marketing events and fun facts to membership

- PMI Hours for Impact – Market chapter opportunities to the greater Los Angeles area

VP of Career Development
James Jackson

Responsibility:

Provide Career Development opportunities for the project management community.

2023 Priorities

- Career Development Events
- Employment Seminars
- Technical Training
- Mentoring Program
- Academic Outreach
- Surveys and Reports

VP of Programs
David Doan

Responsibility:

Produce a variety of impactful and engaging Programs to increase the visibility and value of PMI-LA Chapter.

2023 Goals and Priorities

- Conduct an audit of which programs have resonated with members in the last 3 years to inform future event planning

- Consolidate similar programs (e.g., merge Morning & Pasadena Programs, merge Evening & Webinar Programs) to enable more synergy, cross-training, and adequate coverage

- Collaborate with Region 7 Chapters and promote the Multi-Chapter Program

- Expand the Flagship Program to 3 additional different regions within LA County to promote more access and convenience

- Recruit at least 5 more volunteers to support the various Programs

- PMI Hours for Impact: Support PMI-LA's commitment to building programs to support the United Nations 17 Sustainable Development Goals (SDGs)

VP of Membership
Eleanor Ross

Responsibility:

Manage member and volunteer engagement with the chapter and provide non-PDU opportunities for member value.

2023 Priorities

- Membership Growth & Retention

  - Quarterly New Member Orientation events

  - Quarterly Networking events

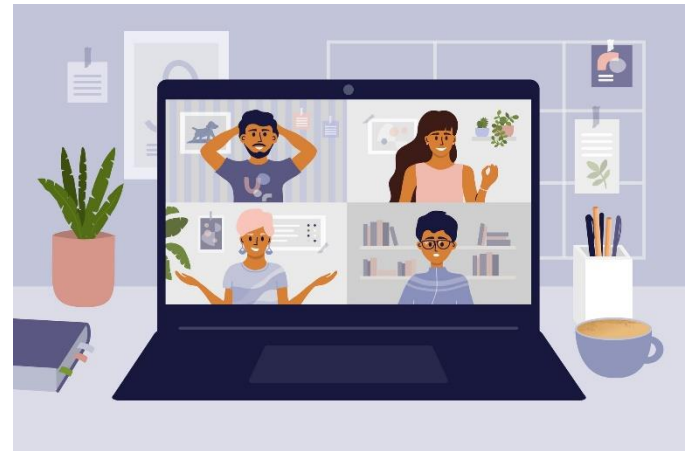 - 2-3 Volunteer Engagement & Recruitment events yearly

    Events will be virtual and in-person during the year

- PMI Hour for Impact

  - Volunteer opportunities to get involved with PMI-LA's sustainability initiative(s)
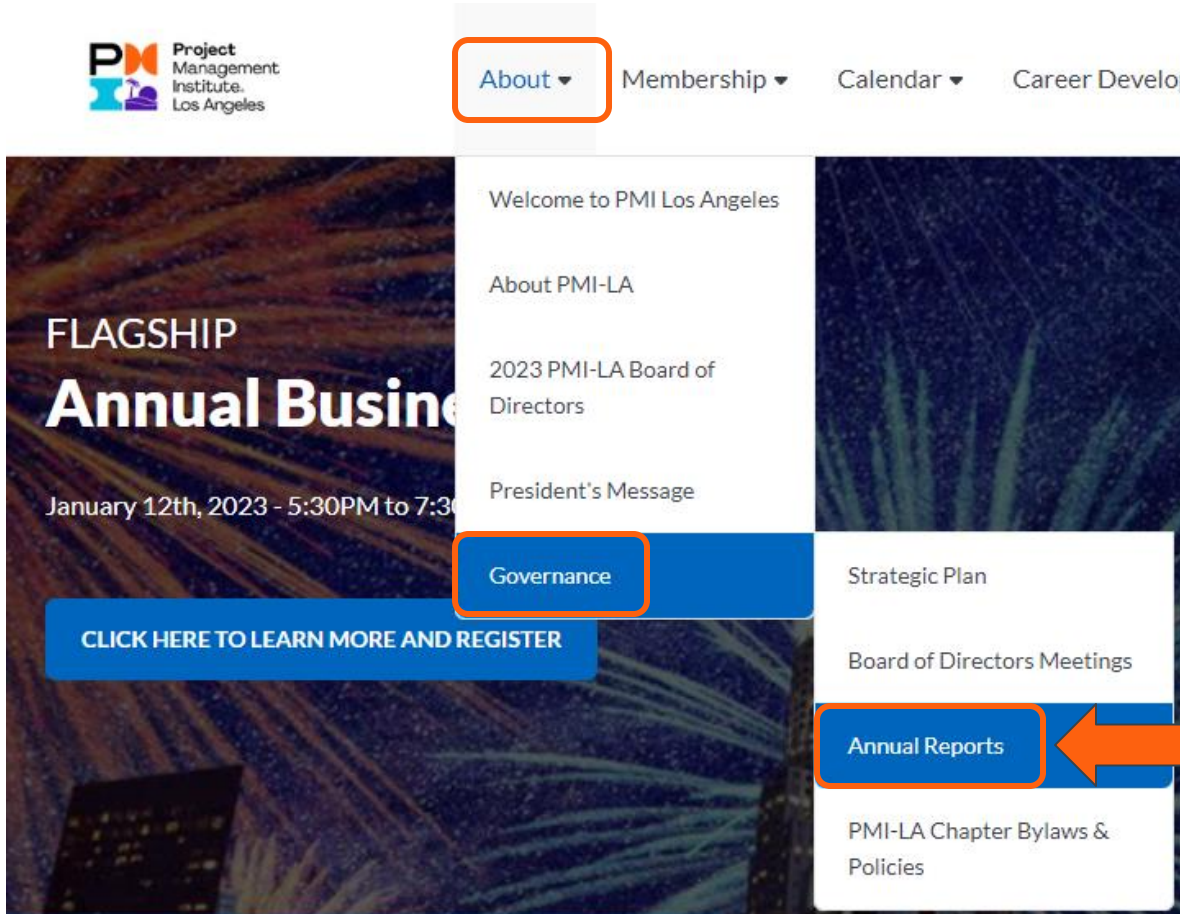
Breakout Rooms

Discussion Topics:

1. What are the priorities that the PMI-LA Board should focus on in 2023?

2. How do we best encourage you to attend events and volunteer for PMI-LA?

3. What PMI-LA project ideas do you have to support PMI Hours for Impact in support of the 17 Sustainable Development Goals?

You will now be moved into different virtual Breakout Rooms.

PMI Hours for Impact

SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY	2 ZERO HUNGER	3 GOOD HEALTH AND WELL-BEING	4 QUALITY EDUCATION	5 GENDER EQUALITY	6 CLEAN WATER AND SANITATION
7 AFFORDABLE AND CLEAN ENERGY	8 DECENT WORK AND ECONOMIC GROWTH	9 INDUSTRY, INNOVATION AND INFRASTRUCTURE	10 REDUCED INEQUALITIES	11 SUSTAINABLE CITIES AND COMMUNITIES	12 RESPONSIBLE CONSUMPTION AND PRODUCTION
13 CLIMATE ACTION	14 LIFE BELOW WATER	15 LIFE ON LAND	16 PEACE, JUSTICE AND STRONG INSTITUTIONS	17 PARTNERSHIPS FOR THE GOALS	

Closing | Wrap Up & Next Steps

- This PowerPoint presentation will be uploaded to the PMI-LA Chapter website within a week
  - **About** > **Governance** > **Annual Reports**

Los Angeles Chapter

Closing | Wrap Up & Next Steps

- Your comments, feedback, and ideas will be collated and synthesized into themes and an Action Plan, which will then be presented and discussed at the February 2023 Board meeting.
  - The goal for the Board is to *take actions to better serve you* in 2023.

Closing | Wrap Up & Next Steps

- Check the **PMI-LA Calendar** regularly, register, and join us at our upcoming events.
  - January 24th: CAREER DEVELOPMENT | 120 VC Stop Trying to Improve Customer Perception
  - January 25th: 120VC Transformational Leadership Program (120-TLP) - 01/25-05/03
  - January 28th: Career Development | USC Bovard College Lecture Series: Portfolio Management
  - January 30th: Webinar - Defeating the Four Horsemen of the Mandated Return to Office: Employee Resistance, Attrition, Quiet Quitting, and DEI
  - February 22nd: Career Development Planning Session
  - March 9th: Flagship Meeting *(in-person)*

THANK YOU

for joining us today!

Please share your comments, feedback, and ideas to:

info@pmi-la.org

Be sure to also visit us at: