



Phoenix Chapter

Making project management indispensable for business results ®

The 2009 - 2010 Strategic Operating Plan of the Project Management Institute (PMI) Phoenix Chapter

Phoenix PMI Chapter Vision

The vision of the PMI Phoenix Chapter is to provide the best Project Management experience to members and the community.

Original version drafted by the Phoenix PMI Board of Directors April 2007
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The Strategic Operating Plan of Phoenix PMI

1.0 Introduction

1.1 About the Strategic Operating Plan

The Phoenix PMI Board of Directors has developed the 2009 – 2010 Strategic Operating Plan (SOP) as the documented output of the strategic planning process. The SOP serves to:

- Document the operating model of the Phoenix PMI Chapter
- Connect the chapter vision, strategic initiatives, goals, and programs & projects
- Serve as the framework for running chapter activities and for measuring results
- Provide stimulus for chapter maturation
- Provide a foundation to be adapted and updated by future chapter leaders

1.2 2009 – 2010 Vision

Phoenix PMI Chapter Vision

The vision of the PMI Phoenix Chapter is to provide the best Project Management experience to members and the community.

Phoenix PMI is dedicated to the transformation of Phoenix, Arizona into the leading city for Project Management through:

- Transparent & authentic leadership
- A collaborative, online community
- Educational, certification, and networking opportunities
- Sharing our knowledge and skills with the local community

...Thereby providing the best Project Management experience to members and the community.

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VISION	
The vision of the PMI Phoenix Chapter is to provide the best Project Management experience to members and the community	
STRATEGIC PRIORITIES	
<ol style="list-style-type: none"> 1. Dramatically improve stakeholder experience 2. Meet financial targets 3. Drive chapter growth and retention 4. Improve operational effectiveness Invest in leadership development 	
DEPARTMENTS	
Communications	Website/Online Community * Weekly Bulletins * Quarterly Newsletters * Job Postings * SharePoint * Process Documentation * Leverage assets to drive revenue
External Relations	Corporate Outreach * Project of the Year & Top 10 Employer Awards * Academic Outreach * Community Outreach * Website * Clarify Roles
Finance	Budgeting & Accounting * Compliance with Fiduciary Requirements * Effective Finance Services * Board of Governance * Responsiveness * Process Improvement * Leadership
Membership	Membership Orientation * Volunteer Opportunities * Membership Survey * Recognition Programs (CAPM, PMP, PgMP) * Ambassador Program * Volunteer Recruiting and Retention * Research * Leadership Development
Operations	Strategic Planning * Preserve Chapter Records * Board of Director Meetings * Operations Scorecard * Process Documentation * Alignment with PMI Global * Leadership Development * Governance Board
Professional Development	Professional Programs/Training Opportunities * Certification Support (PMP, CAPM, PgMP) * PDU Opportunities * Mentorship Program * Region VII and Tucson * Vendor Review * Career Development * OMP3 * Volunteer Growth
Programs	PDU opportunities * Speakers Selection/Programs Schedule * Chapter PDU Dinner Meeting * Leadership Development * Volunteer Growth * Website Enhancements
Project Management Office (PMO)	PMO experience for Members * PMO Resource center for Phoenix * Prioritized Chapter Projects * Standards and Best Practices * Project Hours Tracking * Advanced Skills Seminars * PM Symposium * Project Portfolio Governance

2.0 Mission and Background

2.1 Mission

The Phoenix PMI Chapter exists to fulfill the following objectives, as stated in our Bylaws and Articles of Incorporation:

- Advance the general and specific purposes of the Project Management Institute, Incorporated
- Advance the practice and profession of project management
- Encourage and facilitate education, certification and professionalism in project management
- Provide a forum for discussion and examination of problems, solutions, applications and ideas related to the management of projects
- Disseminate information regarding developments in project management

2.2 Background

The PMI Phoenix Chapter is your local Valley of the Sun link to the Project Management Institute (PMI), the largest and most diverse international organization in the world dedicated to the profession of project management.

The Chapter was founded in 1977, as the 29th Chapter to be chartered in the United States. The Chapter has grown and evolved, until today it has approximately 2000 members, representing project management in industry, consulting, government and academia. Over one-third of our members have earned the PMP certification.

We were incorporated on September 29, 2000 as a 501(c)(6) non-profit corporation as defined by the United States Internal Revenue Service.

3.0 Strategic Priorities

We pursue our chapter vision and mission through the following 2009 strategic priorities:

- Dramatically improve stakeholder experience
- Meet financial targets
- Drive chapter growth and retention
- Improve operational effectiveness
- Invest in leadership development

2009-10 Priorities PMI Phoenix Chapter



Strategic Priorities

Tactics

Dramatically Improve Stakeholder Satisfaction	↔
Meet Financial Targets	↔
Drive Chapter Growth and Retention	↔
Improve Operational Effectiveness	↔
Invest in Leadership Development	↔

- Focused and enhanced commitment to improve member satisfaction and enable chapter growth.
- Provide communication forums regarding employment opportunities via Networking events
- Personal Touch Recruiting
- Provide significant number of opportunities for PDU attainment and PMP and other PM certifications via classes, Book Club, forums/symposium

- Make the Budget
- Create opportunities for vendors and sponsors to support the chapters, Create fundraising events
- 18 month rolling outlook tactics – today vs. tomorrow
- Manage expenses and control costs to ensure most prudent use of chapter funds

- Attract and Retain Members through Value /Satisfaction
- Conduct strategic surveys and feedback sessions to implement most highly value added priorities to members
- Grow relationships with other Chapters share experiences with PMI membership
- Currently offering 5PDM's/month... move to 4 breakfast PDM's (SW valley). Goal of 8 PDM's per month
- Anniversary Party in August (in Scottsdale)

- Increase marketing emphasis and engage Marketing Company by finalizing contract and managing to scorecard
- Align w/ PMI Global as we communicate metrics of the chapter
- Increase and improve Process documentation via periodic audits
- Establish Governance Council (RACI)
- Set PMO standards & best practices
- Launch PMO Portfolio Committee- Approving, Supporting Projects
- Implement Electronic Signature of Onboard Volunteer Documents
- Launch & Utilize Volunteer2.com tool

- Offer From 8 to 240 PDU's per year to members
- Launch Mentoring Program
- Career Development program
- Provide opportunities for members to present PMI benefits to corporations through the Outreach Teams
- Research/Member Contribution

PMI Phoenix Chapter - www.phx-pmi.org Development Progression Plan for Leaders based on Development Goals 6

For more information about Phoenix PMI Vision, Mission and Strategic Priorities, please contact:

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Doug Orlando, PMP
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President@phx-pmi.org

4.0 Measuring Our Chapter's Performance and Maturity

The Phoenix PMI Leadership team is committed towards continuous improvement and chapter maturation. A baseline Chapter Operations Scorecard and Maturity Model have been developed to review chapter performance and maturity.

4.1 Chapter Measurement by PMI Global

Measuring our performance is key for evaluating our chapter's chapter progress, maturity, and growth. The PMI Phoenix Chapter has adapted PMI Global's new Strategic Alignment, Planning, and Reporting process (SAPR). This new process measures how the chapter performed against the targets that are set in the Strategic Alignment Scorecard or SAS.

The following criteria is measured and reported annually. The data reported in the SAS will reflect the immediate 12 months prior to reporting (this does not have to be a calendar year).

PMI BSC (Balanced Scorecard) Perspectives	PMI BSC (Balanced Scorecard) Objectives
Stakeholder Intimacy	Provide knowledge and tools with great service
Stakeholder Intimacy	Strengthen stakeholder loyalty
Stakeholder Intimacy	Demonstrate benefits from project management
Internal Business Processes	Thought leadership
Internal Business Processes	Profession enablers
Business Processes	Partnering
Business Processes	Advocacy
Culture and Capabilities	Make PMI a customer centric organization
Culture and Capabilities	Make leadership excellence a strategic competency
Culture and Capabilities	Make market and business development a strategic competency
Resources	Leverage resources / investments in the marketplace
Resources	Maintain financial viability

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4.2 Chapter Measurement by PMI Phoenix Chapter

The PMI Phoenix Chapter continues to measuring and track its own performance and chapter progress, maturity, and growth. The Phoenix Leadership team has established the following metrics:

CHAPTER PRIORITIES/METRICS
Sustain the Chapter <ul style="list-style-type: none">• Annual Records/Filings Complete (IRS, ACC)• Financial Reporting Updated
Provide a Communication Forum <ul style="list-style-type: none">• # of log-ins• # hits• % usage increase• # job postings
Provide Education and Support Certification <ul style="list-style-type: none">• # PDUs offered• # of courses or programs offered
Encourage Professional Development <ul style="list-style-type: none">• # PMPs, CAPMs, PgMPs• % Members Certified (PMP, CAPM, or PgMP)• # RSVPs to events
Function with Operational Excellence <ul style="list-style-type: none">• # of new and returning (active) volunteers• quarterly reporting completed
Promote the Profession in the Community <ul style="list-style-type: none">• # of corporate/external presentations• # partners
Add Value for Members <ul style="list-style-type: none">• # new and total members• # networking events offered
Raise the Bar <ul style="list-style-type: none">• Annual survey results

4.3 Chapter Development Progress

PHOENIX PMI CHAPTER DEVELOPMENT MODEL
Horizon (2009 & Beyond) <ul style="list-style-type: none">• <i>Mentoring (Career, Certification Package)</i>• <i>Expanded Outreach (University, Student Chapter, Community)</i>• <i>Increased Sponsorship/Marketing for Chapter</i>

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- *Community Outreach Program*
- *Symposium/Professional Development Day*
- *Seminars*
- *Additional Networking Events*
- *Additional PDU Opportunities (i.e. Book Club, Webinars, etc.)*
- *Sponsored Speaking Engagements*
- *Program Management Professional (PgPM) Certification Preparation*
- *Continued Certification Preparation (Wave of recertifications)*
- *Corporate Outreach*

Recent Additions (2008)

- *Completed Charter Marketing Plan, Corporate outreach redesigned presentation and is currently working to present to two companies*
- *Continued initial alignment to PMI Global's new Performance Management Framework (PMF) including new PMI Global Scorecard*
- *Updated PMP/CAPM Exam Prep Course material as well as instructor materials and held chapter sponsored courses*
- *PMI Phoenix chapter has sustained a membership growth rate of 2.58%.*
- *Held monthly new member orientation meetings*
- *Chapter bulletin launched in July '08, and numerous website updates*
- *Started Scottsdale PDM evening meetings and PMI Phoenix Holiday Party*
- *Drafted set of Chapter Financial Policies for future team activities.*
- *Enhanced Recognition Programs (Volunteer of the Month, Volunteer of the Year, Annual Awards Dinner)*
- *Volunteer Services Program*
- *Annual Volunteer Survey*

Phoenix Chapter Fundamentals

- *Monthly Professional Development Dinner Meetings*
- *Professional Development Classes*
- *PMP Exam Prep Course*
- *Breakfast Meetings*
- *Reporting*

5.0 Phoenix PMI Departments

The Phoenix PMI Board of Directors, Chapter Leadership Team, and other Volunteers support our Strategic Priorities through initiatives and projects in the following departments:

- Communications
- External Relations

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- Finance
- Membership
- Operations
- Professional Development
- Programs
- Project Management Office (PMO)

5.1 Communications

Investing in and maintaining forums for chapter correspondence are the key focus areas of Phoenix PMI Communications. The usage of Internet and web-enabled technologies enables Phoenix PMI to engage chapter members in chapter activities and other events related to the project management community. To achieve Phoenix PMI's mission, we will:

- Maintain the Phoenix PMI Chapter website/online community through planned investment in Phoenix PMI web technologies
- Deliver Bulletins and Quarterly Newsletters to chapter members through email correspondence
- Review website usage statistics
- Document processes

For more information about Phoenix PMI Communications, please contact:
Greg Stoner, PMP
VP of Communications
Communications@phx-pmi.org

View our Chapter Website at: www.phx-pmi.org

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4.2 External Relations

The objective of Phoenix PMI External Relations is to promote the Phoenix PMI chapter to local businesses, academic organizations, professional associations, and the Phoenix community. In addition, we aim to build a strong marketing and public relations program to promote awareness of the activities and offerings of this world-class chapter. To achieve Phoenix PMI's External Relations mission, we will:

- Represent Phoenix PMI to the community and liaise with other PMI Components and PMI Global through PMI Public Relations
- Form alliances with local corporations and other local professional organizations through PMI Corporate Outreach
- Sponsor Phoenix PMI's "Top 10 Employer", "Project of the Year", and "Distinguished Project" Award Programs through PMI Corporate Outreach
- Manage sponsorships and sponsor relationships for support of chapter events and initiatives through PMI Corporate Outreach
- Manage the award of scholarship(s) and the "Student Project of the Year" Award Program through PMI Academic Outreach
- Provide presentations on Project Management and PMI to local schools and universities through PMI Academic Outreach
- Work with local universities to provide educational opportunities in Project Management and form student sections within the Phoenix chapter through PMI Academic Outreach
- Participate in community events and offer project management skills to local non-profit organizations through PMI Community Outreach

For more information about Phoenix PMI External Relations, please contact:

Hal Korff

VP of External Relations

ExternalRelations@phx-pmi.org

View the External Relations Website: at: www.phx-pmi.org under the External Relations tab

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5.3 Finance

The promotion of Phoenix PMI budget planning, execution, and financial reporting are key focus areas of Phoenix PMI Operations. The creation of a high performing team, expert in the use of financial tools and techniques are key to our success. To achieve Phoenix PMI's mission, we will:

- Develop, administer and maintain budgeting, accounting, approval documentation and reporting procedures and systems
- Ensure compliance with PMI Global, local, governmental and external fiduciary requirements in order to sustain public trust and meet non-profit requirements
- Engage in high quality, conscientious, responsive and effective services for PMI members and leadership
- Establish a Chapter Board of Governance
- Implement business process improvements
- Invest in leadership

For more information about Phoenix PMI Finance, please contact:

Forrest Smith, PMP

VP of Finance

Finance@phx-pmi.org

View the Phoenix PMI Website at: www.phx-pmi.org

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5.4 Membership

Phoenix PMI's Membership department's emphasis is on providing a good value proposition across the diverse needs of chapter members. Phoenix PMI Membership seeks to encourage greater participation by all of its members so that the chapter can provide ample growth opportunities to all of our members. To achieve Phoenix PMI's mission, we will:

- Hold monthly membership orientation events to welcome and educate new members to chapter
- Actively recruit members to volunteer opportunities
- Maintain a volunteer orientation handbook and create an orientation process
- Conduct recognition program for volunteers on a monthly and annual basis
- Host an annual awards event for chapter volunteers
- Conduct an annual membership survey, annual volunteer survey, and PDU dinner meeting surveys
- Contact non-renewals and members close to renewal date to remind and inform members of renewal and benefits of membership to retain chapter members
- Assist and encourage members to obtain certification in PMI (CAPM, PMP & PgMP)
- Conduct a New PMP/CAPM/PgMP / Risk / Scheduling / Recognition Program
- Start new ambassador program to greet members at meetings and chapter events
- Coordinate the chapter's applications for component awards
- Coordinate with the Professional Development team to encourage members to conduct and present research
- Invest in leadership

For more information about Phoenix PMI Membership, please contact:

Arthur Kenjora

VP of Membership

Membership@phx-pmi.org

View the Membership Website at: www.phx-pmi.org under the Membership tab

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5.5 Operations

The promotion of operational excellence, strategic planning, chapter documentation & records maintenance, as well as measuring our performance are key focus areas of Phoenix PMI Operations. To achieve Phoenix PMI's mission, we will:

- Drive strategic planning and active plan maintenance with the Phoenix PMI Board of Directors
- Maintain chapter records and support the digitization of key materials
- Protect and preserve chapter records
- Support the documentation & facilitation of Phoenix Board of Director meetings
- Measure chapter progress through Phoenix PMI Operations Scorecard metrics
- Provide a foundation for continued chapter growth through documentation of chapter processes
- Establish a Chapter Board of Governance
- Invest in leadership planning, transitioning, succession
- Manage chapter assets and library

For more information about Phoenix PMI Operations, please contact:
Pamela Smith
President Elect/Secretary
presidentelect@phx-pmi.org

Learn about Phoenix PMI at: www.phx-pmi.org under the About tab

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5.6 Professional Development

The Phoenix Chapter Professional Development Organization is designed to provide PMI Phoenix Chapter members as well as the project management community-at-large a variety of professional development programs and opportunities to maintain project management excellence in the State of Arizona. To achieve Phoenix PMI's mission, we will:

- Provide professional programs and training opportunities created by the Phoenix Chapter and its partners
- Offer planned workshops, seminars, and activities to develop and promote the professional disciplines of project and program management for all members
- Provide support for Project Management Professional (PMP), Certified Associate in Project Management (CAPM), Program Management Professional (PgPM), Planning (PMI-SP), Risk Management Professional (PMI-RPM), certifications including certification preparation courses
- Provide listings of vendors, study groups, courses and community events to support preparation for PMI credential exams
- Provide PDU opportunities to our chapter members on a monthly basis (i.e. Webinars)
- Design a Project Manager Mentor Program
- Participate in Future City Competition - Kick-off and Project Management Training Session for Interested Schools
- Participate in Junior Achievement
- Build relationships with PMI Global and the Tucson chapter
- Transition to PMBOK Fourth Edition
- Pilot new OMP3 release
- Encourage members to conduct and present research
- Offer all Chapter members outstanding career and professional development opportunities

For more information about Phoenix PMI Professional Development, please contact:

Alika Victor, PMP
VP of Professional Development
education@phx-pmi.org

View the Professional Development Website at: www.phx-pmi.org under the Professional Development tab

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5.7 Programs

The objective of Phoenix PMI Programs is to provide outstanding program events to our members. Phoenix PMI Programs arranges and hosts our monthly chapter dinner meetings and is responsible for speaker recruitment and selection. PMI speakers are selected based on topic, presentation experience, and scheduling/availability. PM “technical” and “soft skills” topics are varied throughout the year. To achieve Phoenix PMI’s mission, we will:

- Provide PDU opportunities to our chapter members
- Publish Chapter Dinner Speakers schedules and program notes through Chapter Communications
- Select speakers to provide programs on a variety of PM related topics
- Run monthly Chapter PDU Dinner Meetings
- Expand breakfast and lunch PDM
- Develop and support volunteer growth
- Support development and presentation of white papers from chapter members
- Invest in leadership

For more information about Phoenix PMI Programs, please contact:

Tom Kula, PMP

VP of Programs

Operations@phx-pmi.org

View the Programs Website at: www.phx-pmi.org under the Programs tab

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5.8 Project Management Office (PMO)

Phoenix PMI is pleased to hold the second Project Management (PMO) of The Project Management Institute Component Chapters. Projects supporting chapter initiatives will be hosted through the Phoenix Chapter PMO. As PMOs become increasingly relevant in the project management field, the Phoenix Chapter PMO serves as an example office. To achieve Phoenix PMI's mission, we will:

- Provide a means for any PMI-Phoenix member to gain project management and PMO experience
- Build the Board of Directors role as the Portfolio Steering Committee
- Create a resource center for PMOs in the Phoenix area
- Develop project management standards and best practices
- Ensure that the Chapter's initiatives are prioritized and managed by maintaining an active list of Phoenix PMI chapter initiatives and supporting projects
- Review chapter current project cost and schedule status and charter new initiatives
- Ensure chapter projects are planned and staffed with appropriate PM and team coverage
- Track project volunteer hours
- Support Advanced Skills Seminars and PM Symposium efforts

For more information about Phoenix PMI Program Management Office (PMO), please contact:

David Atwood, PMP
VP of the Program Management Office
PMO@phx-pmi.org

View our Chapter Website at: www.phx-pmi.org

6.0 PMO: Active Phoenix PMI Programs and Projects

An active list of programs and projects is available through the Phoenix PMI Project Management Office. For an active list of chapter projects or to participate in PMO activities, please contact the VP of the PMO.

7.0 Policies/Governance

Chapter articles of incorporation, policies and procedures, and related documentation may be found at the PMI Phoenix website under the About tab:

www.phx-pmi.org