



**Project**  
Management  
Institute®  
Northeast Ohio

WELCOME

**Annual Meeting**

**February 15, 2023**

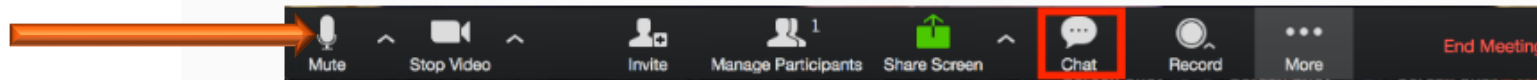
# Agenda

<b>5:30-5:50 pm</b>	<b>Welcome and Networking (All)</b>
<b>5:50-6:00 pm</b>	<b>Announcements (Ramya)</b>
<b>6:00-6:25 pm</b>	<b>2022 Highlights (OPS Board)</b>
<b>6:25-6:30 pm</b>	<b>2022 Financial Review (Laura)</b>
<b>6:30-6:50 pm</b>	<b>2023 Strategy and Vision (Todd)</b>
<b>6:50-7:00 pm</b>	<b>Wrap-up &amp; Review of Claiming PDUs (Joe)</b>

# We are using the Meeting feature of Zoom for this event

- ❑ Please silence your microphones on your computer, or on your phone.
- ❑ If you wish to raise a question and share experience , please use Zoom's chat feature and we will have someone monitoring to ask the questions on your behalf.

Mute

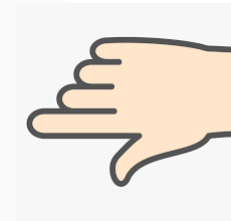
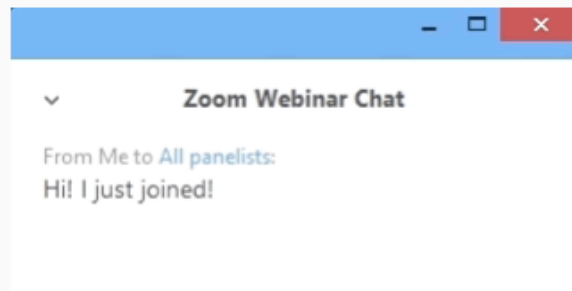


1. As an attendee, **Chat** will be in the controls at the bottom of your screen.

2. When you click on chat, the chat window will appear. It will be on the right if you are not in full screen. If you are in full screen, it will appear in a window that you can move around your screen.

3. Type your message and press **Enter** to send it.

- You can also select who you would like to send the message to by clicking on the drop down next to **To:**.



# Let's get interactive!

Visit the following website  
[www.menti.com](https://www.menti.com)

Enter code **1818 6126**

Then wait for further instructions  
during this presentation.



# SURVEY Question!

Go to [Menti.com](https://www.menti.com) and enter code: **1818 6126**

## PMINEO POLL



PMI has new strategies on changemakers. Are you familiar with this term?

- Yes
- No
- I'm curious, tell me more

# Chapter Organizational Announcements

## **Governance Board** (elected):

- Todd R Jones - President
- Ramya Ramadurai - Secretary
- Laura Hoffmann - Treasurer
- Jai Jacob - Director at Large
- Steve Peterson - Director at Large

## **Operations Board** (appointed):

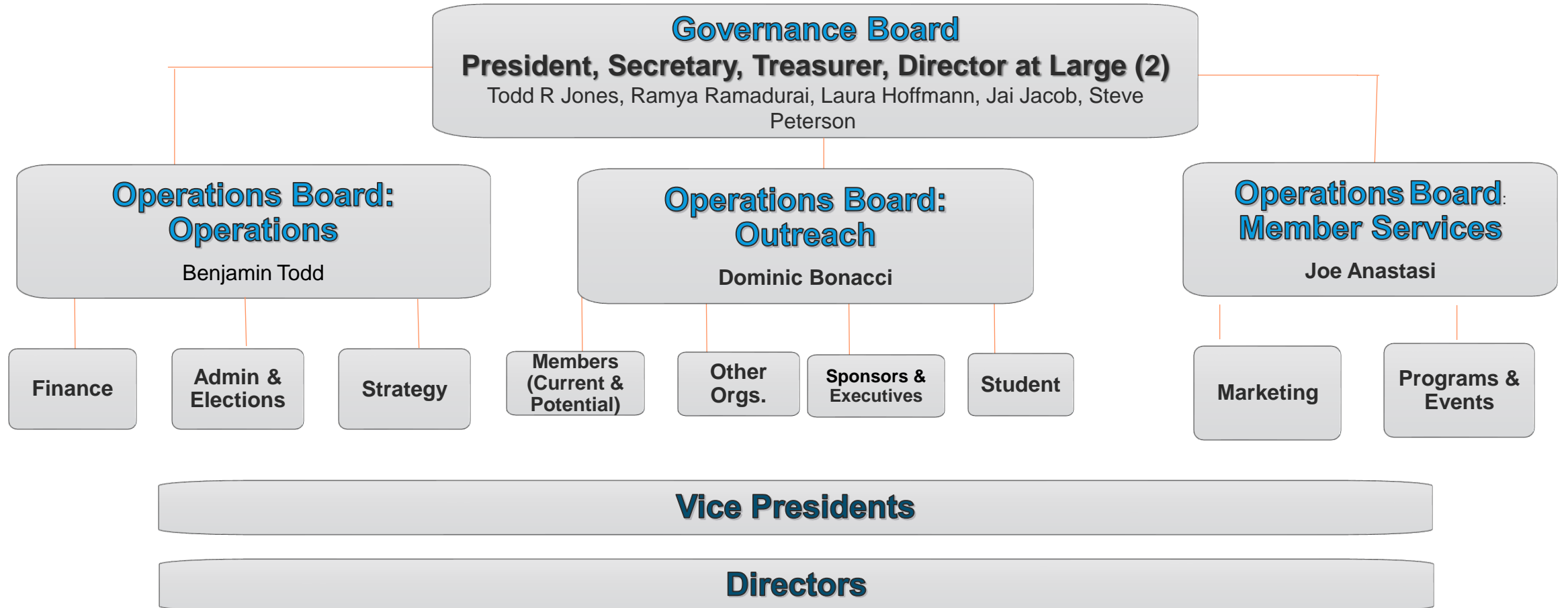
- Joe Anastasi for Member Services
- Benjamin Todd for Operations
- Dominic Bonacci for Outreach

VPs and Directors are leadership positions within the organization.

- Along with our volunteers, they keep the chapter running

**Feel free to connect with our leaders via LinkedIn or at one of our virtual networking meetings.  
We want to hear from you!**

# PMINEO Org Structure



# SURVEY Question!

Go to [Menti.com](https://menti.com) and enter code: **1818 6126**

PMINEO POLL

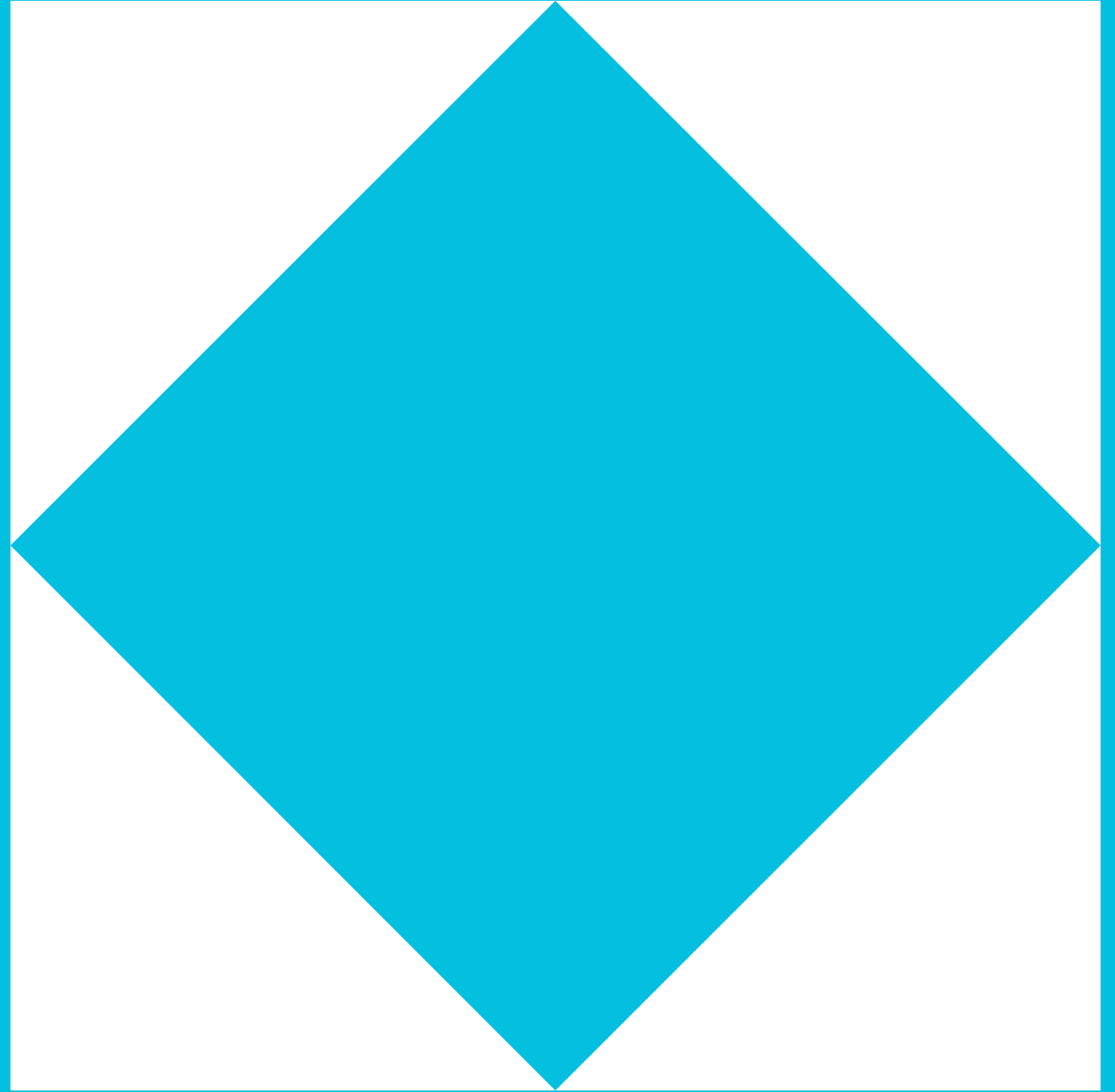


What city are you calling in from?





# 2022 RECAP



# Operations Board



Benjamin Todd – Operations



Joe Anastasi – Member Services



Dominic Bonacci – Outreach

# 2022 Highlights – Outreach

Membership	Academic Outreach	Community Outreach	Executive / Sponsor	Industry Liaisons	Professional Links
<ul style="list-style-type: none"><li>Continued some social events in virtual format. Social events were one of first to return to in-person August Rubber Ducks September Golf Outing.</li><li>3Q Survey to new/current/former members: <i>Chapter is meeting member expectations.</i></li></ul>	<ul style="list-style-type: none"><li>Continued presentations to students at local colleges</li></ul>	<ul style="list-style-type: none"><li>PMI's Social Good initiative</li></ul>	<ul style="list-style-type: none"><li>Revising our executive engagement to an advisory council.</li><li>Maintained a relationship with key chapter sponsors during our virtual programs and social events</li></ul>	<ul style="list-style-type: none"><li>Develop a corps of volunteers from large employers to communicate chapter benefits and programs using internal resources.</li></ul>	<ul style="list-style-type: none"><li>Establish and maintain relationship with aligned organizations</li><li>Cross promote events/membership</li><li>Co-produce events (if/when it makes sense)</li></ul>

# 2022 Highlights – Operations

## Budget

- Ilona Kirzman continues to manage our Finances
- 2023 budget has been approved by the Gov Board
- QuickBooks adopted in 2022
- New categories have been created in QuickBooks to align with the GL

## Volunteering

- Bunnie Hairston & Lenora Day has been added to the Volunteer Team
- Volunteer opportunities posted in VRMS
- We continue to look for great candidates & volunteers

## Chapter Elections

- Carla Reeves has been added to the Elections Team
- 2022 Election went well
- Nominations and Elections are merely a few months away - Three Gov. Board Seats will come available. Candidates Needed!

## Administration

- Cullen McCulloch has been added to the Admin Team
- New Mission Statement created for the Operations Area
- We plan to continue to work to improve our Operational Excellence

# 2022 Highlights – Member Services

## Professional Development

- Baldwin Wallace University is our Professional Development Partner
- Continued partnerships with Peak Business and Velociteach for certification prep training

## Marketing

- Steve Peterson is VP Marketing
- The team continued to improve and evolve the chapter newsletter.
- Completed website migration to new Mg2 platform.
- Stronger social media presence in promoting our volunteers, our events.

## Programs

- Amer Albuttma is VP Programs
- Continue to offer multiple monthly virtual events throughout the year.
- Offered virtual PDD and hybrid IPM Day this past year
- Monthly Thursday Tech Webinars via Zoom
- Continued strategy and leadership series of programs.

# 2022 FINANCIALS

## 2022 Profit & Loss

### Income

- \$39,000
- 80% of Income from Membership Dues

### Expense

- \$30,000
- 50% on web-hosting and web-support
- 30% spent on Speakers, PDD and other programs and awards.

### Net Operating Income

- Surplus of \$8,500

# SURVEY Question!

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Our events this year will be a mix of in-person, online and hybrid meetings. What do you prefer?

- In-person
- Online
- Hybrid / I like the option of both



# 2023 STRATEGY AND VISION

# Todd R Jones – Chapter President

Member since 2005

Volunteer since 2008

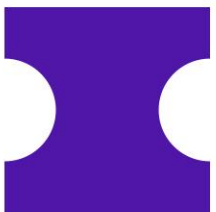
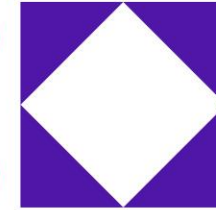
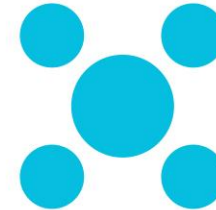
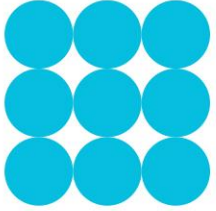
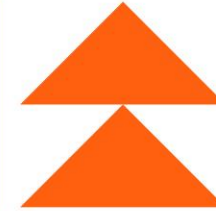
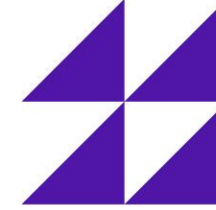
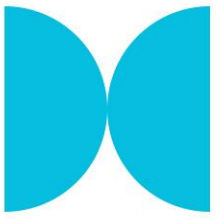
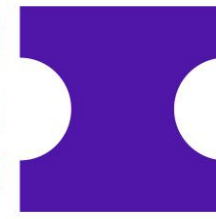
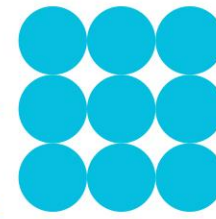
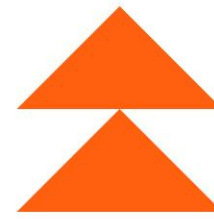
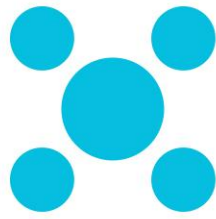
Ops Board 2014-2017

Gov Board 2018-present

Graduate of PMI Leadership Institute  
Master Class in 2016

Awarded Dr. Harold Kerzner Project  
Management Excellence Award in 2017





# PMI 4.0

Strategic Narrative Presentation  
– Updated September 2021

#PMIOfficial

**PMI IS ON A MISSION.** As the leader in project management, we aim to empower people to make ideas a reality.

PMI 4.0 is our growth strategy that addresses the needs of our existing community and welcomes a new audience of global changemakers.

Our community is strong and together, we can shape the future.



# Our Aspiration of Expanded Social Impact



**“Empowering people to  
make ideas a reality”**

We, the broader PMI community, volunteers, chapters, and Board aim to bring our winning aspiration to life for changemakers of all ages.

# Our Strategic Objectives

These objectives align our community in a common direction, allowing us to shape the future – together.

## **Broaden our Reach**

Empower the PMI Community to share our collective wealth of knowledge with new people who need it.

## **Deepen our Impact**

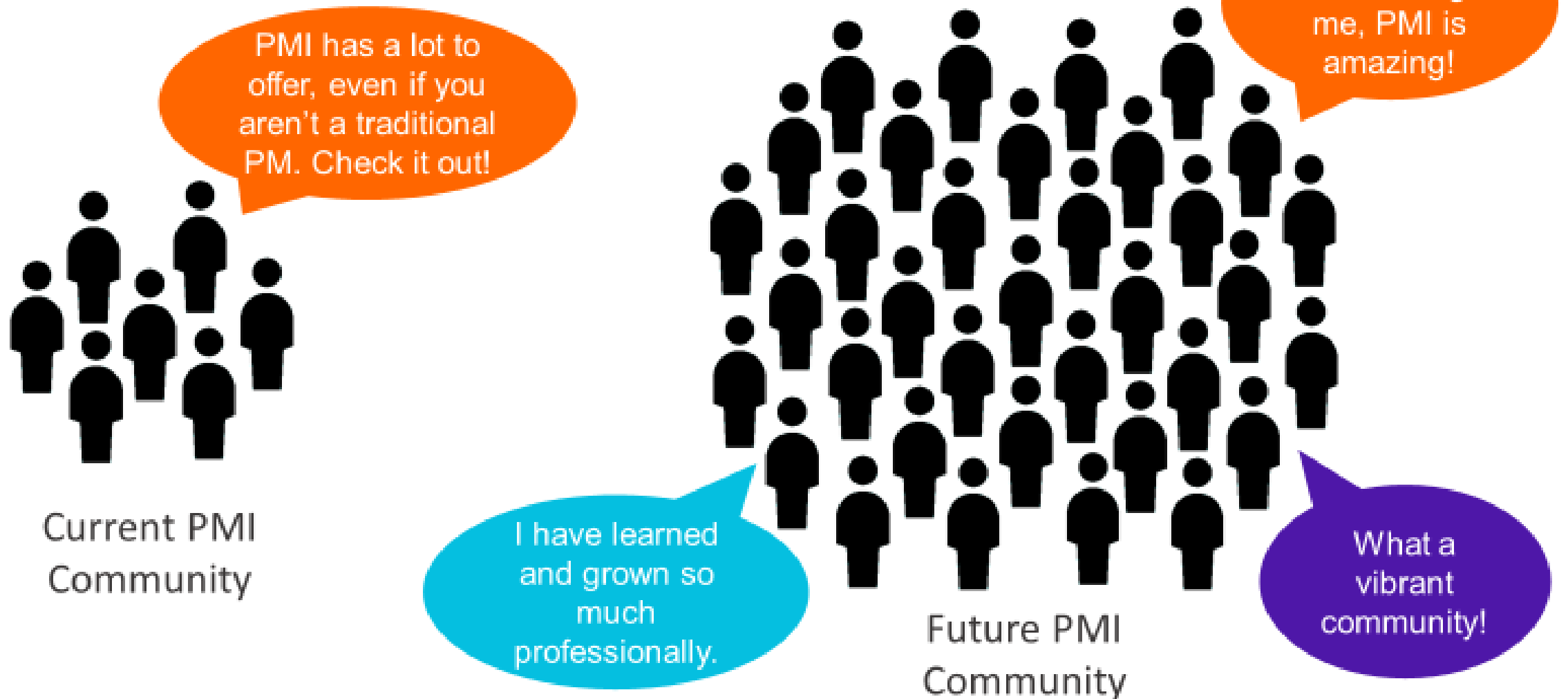
Have a profound impact on people's lives and **EMPOWER THEM** to make their ideas a reality.

## **Nurture Lasting Relationships**

Cultivate deep, trusting relationships with people and organizations who share our aspiration.

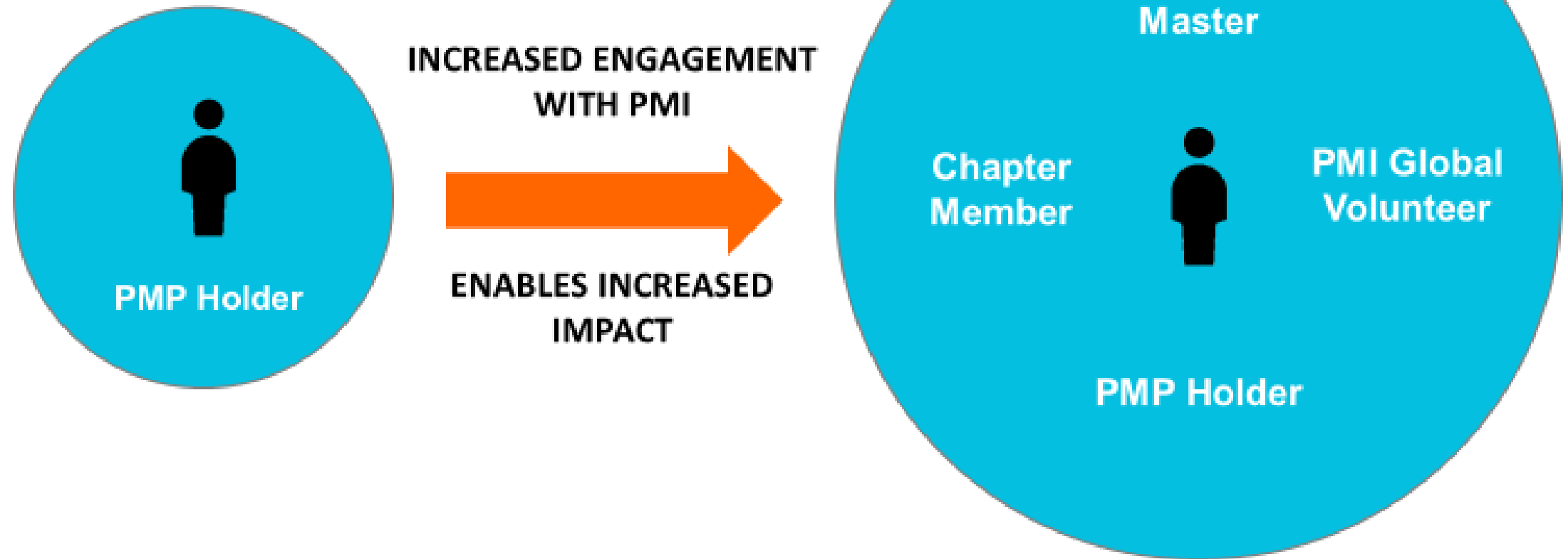
# Broaden Our Reach: Explained

Empower the PMI Community to share our collective wealth of knowledge with new people who need it.



# Deepen Our Impact: Explained

Have a profound impact on people's lives and EMPOWER THEM to make their ideas a reality.



If every member of the PMI community, individuals and organizations, takes full advantage of what PMI has to offer, and applies that knowledge ethically, our community will be a powerful force for good.



# Nurture Lasting Relationships: Explained

Cultivate deep, trusting relationships with people and organizations who share our aspiration.



Students



Rising Leaders



Mid-Level and Senior  
Executives

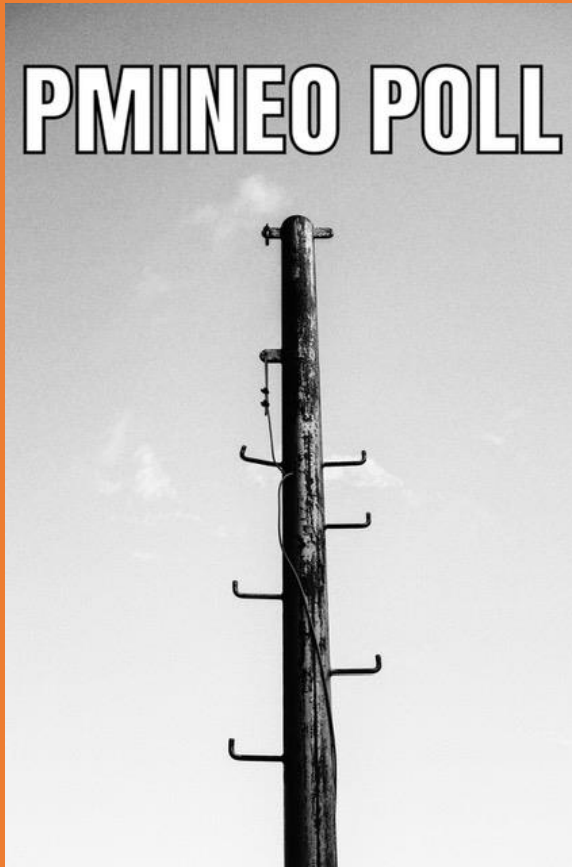


Organizations

By consistently engaging stakeholders and delivering value over time,  
we become a trusted partner in professional growth and change.

# **SURVEY Question!**

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**How are you helping PMI to broaden our reach, deepen our impact, nurture lasting relationships?**

# How is PMINEO supporting PMI Strategy?



# Our Updated Vision

To be recognized as the premier NEO organization that empowers changemakers to transform ideas into reality

# Our Updated Mission

Provide an environment for change makers to

- grow professionally
- advance PMI® objectives
- engage for social good within the community
- network with project experiences, and
- support NEO business success through project management principles.

# Our Key Objectives

## **Governance**

Operate as an organization that embraces business agility.

## **Professional Development**

Offer relevant and beneficial development opportunities.

## **Networking**

Facilitate networking opportunities and PM communities of engagement (CoEs) by attracting and retaining members.

## **Community**

Engage with the community to promote change for social good.

## **Knowledge**

Be a recognized source of project management expertise to local businesses, academic institutions, government, and professional associations.

## **Advocacy**

Become a positive voice in the advancement of project management within organizations.

# Focus Areas for 2023

1. Market the PMINEO Brand
2. Create Community
3. Engage Young Professionals

VALUE



**SURVEY Question!**  
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**Which focus area resonates with you?**

Scale 0	Market the PMINEO Brand	Scale 10
	Create Community	
	Engage Young Professionals	



# **SURVEY Question!**

**Go to Menti.com and enter code: 1818 6126**



**What can PMINEO do to help your employer recognize the value of being a chapter member?**

# PMI Northeast Ohio Annual Awards

- We will award Northeast Ohio professionals for outstanding achievements in Project Management. We are currently accepting nominations in 3 categories.
  - Project of the Year
  - Kerzner Award for Project Excellence
  - Young Professional of the Year
- Visit <https://pmineo.org/overview/awards> to learn more and to apply for one of the awards.
- Call for nominations soon!
- The award ceremony will be held [live!] in May during Professional Development Day.



# PMINEO Annual Awards – Think back to your 2022 highlights!

Project of the Year	Kerzner Award for Project Excellence	Young Professional of the Year
Recognizes a project that best delivers the anticipated organizational results and demonstrates outstanding examples of project management principles and practices at work.	Acknowledges an individual who has made significant contributions to, and demonstrated continual commitment toward, the project management profession.	Honors a young professional who has made a significant impact in advancing project management within an organization, promoting the knowledge and the practice of project management, and demonstrating an understanding of PMI standards, practices, and ethics.
<i>We are not looking for "big" projects, but rather projects of some significance where good project management methodology was successfully applied.</i>	<i>A person that has enhanced project management concepts, practices, and techniques at work <b>or in the community.</b> Perhaps not be specific to any one project but their participation made a difference!</i>	<i>Consider a young colleague that is early in their PM Career!</i>

**Bookmark this site:** <https://pmineo.org/overview/awards>

Updated Awards and nomination info will be posted soon!

# Thank you to our Sponsors

## Chapter Sponsors:



## Event Sponsors:



2022 Golf Outing  
March 14, 2023 Chapter Meeting



March PDD  
November IPMD

# Thank you to our Preferred Partners



## And our Featured Providers:



# SURVEY Question!

Go to [Menti.com](https://menti.com) and enter code: **1818 6126**



Do you think ChatGPT will replace project managers?

0	0	0
Yes	No	I already am a robot



# Event Calendar 2023

- 2/16/2023 --- PMI BrightLine Initiative
- 3/7/2023 --- Get to Know the PMINEO Chapter
- 3/14/2023 --- How to use Emotional Intelligence (EI) to Increase your Value Proposition
- May TBD --- Professional Development Day at Baldwin Wallace (save the date)
- We have other ideas brewing for Programs and for Social Events.
- Events are added frequently. We are working on filling up the entire year with virtual and in person events.
- Visit [pmineo.org](https://pmineo.org) to learn more and to register.



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Northeast Ohio

## Top 5 Volunteer Opportunities

1. Greeters for Chapter Meetings
2. Programs Meetings Team Members
3. Membership Team Members
4. Operations Team Volunteer
5. Industry Liaisons

# Volunteer Opportunities at PMINEO

Volunteering has many benefits!

Volunteer PDU's

Giving Back to your PM Community

Fantastic Networking Opportunity

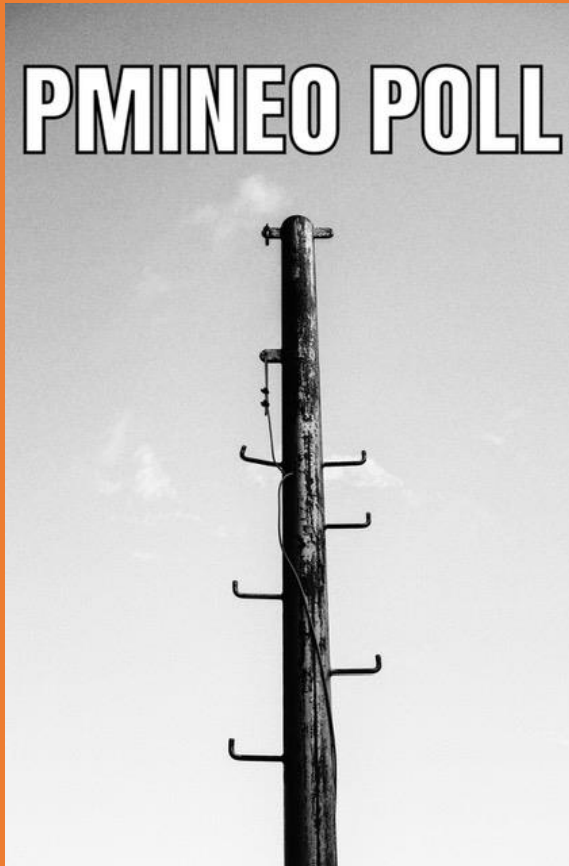
Gain Leadership Skills

**Visit: [vrms.pmi.org](https://vrms.pmi.org) for these opportunities and more!**



# SURVEY Question!

Go to [Menti.com](https://menti.com) and enter code: **1818 6126**



## How did we do tonight?

- |     |                                   |
|-----|-----------------------------------|
| 1st | Nailed it                         |
| 2nd | Well worth my time                |
| 3rd | Learned a few new things          |
| 4th | Good thing there are free PDUs    |
| 5th | There's an hour+ I won't get back |

# Claim your own PDU's for this event

**If you have a PMI credential, please report your own PDU's:**



**PDU Claim Code: C048JI7F00**

**Title: 2/15/23 - Annual State of the Chapter 2023**

**Course Identifier: 20230215**

**PDU: 1.0 Business**

# THANKS FOR YOUR ATTENDANCE!

