

**TO:** All PMI Northeast Ohio Members and Guests

**FROM:** Tim Oberschlake, Director at Large, PMI Northeast Ohio Chapter

**SUBJECT:** 2016 Operating Results

## **Greetings from the PMI Northeast Ohio Chapter Leadership Team!**

It is our pleasure to share our 2016 Operating Results. Our accomplishments furthered our shared mission of creating an environment that fosters professional development through continued learning, networking opportunities, and supporting project managers throughout Northeast Ohio.

The programming offered by our chapter over the past year includes the following:

- **Four Signature Events** which recognize and educate our members. We also capture our 2017 Kerzner Award Dinner in the summary below since it was moved back to January for 2017.
  1. **2016 Kerzner Award Dinner** – This event annually recognizes an outstanding contributor to project management in our local area during the previous year. The 2016 event took place at the Holiday Inn in Independence on April 12. Our 2015 recipient was recognized was Lance Wanamaker, from Michael Baker International, Inc. We also presented the “Kerzner Project of the Year” Award to University Hospitals, for its Homecare Integration project. Several other projects were also recognized that were in contention for the award. Dr. Harold Kerzner asked the question “Would you want to be a project manager for the Olympic Games?” in his keynote presentation. The rest of the title was “Be careful what you wish for!”
  2. **2016 Professional Development Day (PDD)** – Three speakers were featured in our June Professional Development Day this year. Anthony Reed discussed “Managing Difficult project and People” which taught tips on how to regain control of wayward project and how to prevent problems from occurring. Jennifer Smith talked about “Game Changing Leadership”. This presentation taught attendees how to position themselves to have influence with a team as well as senior leaders ultimately ensuring a successful career. Dave Sherman presented “How to finally understand and embrace the fine art of business networking”. This discussion focused on overcoming fears of networking and how to make every networking even a successful networking event.
  3. **2016 “International Project Management” (IPM) Day** – The chapter partnered again with Baldwin Wallace in November as part of their Kerzner Lecture Series to host a celebration of project practitioners. Speaker Katherine Miracle provided a prescription on how best to deal with the four generations in the workplace.

4. **2016 PMINEO Year-End Celebration** – The chapter capped off a wonderful year of promoting the project management profession by holding a Casino Night on December 1, 2016 at Country Lakes Party Center in Broadview Heights. The evening included casino games, raffle prizes, appetizers, and a word from our esteemed president Paul Allen.
  5. **2017 Kerzner Award Dinner** – Our 2016 award recipient was Todd Jones, from the Westfield Group / Westfield Insurance. We also presented the “Kerzner Project of the Year” Award to KeyBank, for its Mortgage Insourcing project and recognized several other projects that were in contention. Dr. Harold Kerzner’s key note address focused on PM 2.0 and PM 3.0: The Next Generation of Project Managers. His reflections on the project management profession are always beneficial for those in attendance.
- **Chapter Meetings** – Chapter meetings give our members the opportunity to network with other project management professionals while also learning about the project management profession. Over 650 of our 1485 chapter members attended at least one event over the course of the past year. Someone who attended all of our chapter meetings earned over 10 PDUs at no cost to that member. Our meetings were held at several different locations to increase member access, such as:
    1. **Sharing Strategies for Managing Stakeholders** (January)
      - Acumen Solutions in Seven Hills
    2. **Inspirational Leadership & Communication in a Project Driven Environment** (February)
      - Progressive Insurance in Mayfield Village
      - Hyland Software in Westlake
      - University of Akron Medina County Center in Medina
    3. **Critical Chain Management** (March)
      - Nestle in Solon
    4. **Overview of the US Treasury Mobile Program** (May)
      - Federal Reserve Bank in Cleveland
    5. **User Involvement in IS Projects** (June)
      - Rockwell Automation in Mayfield Heights
    6. **2015 Kerzner Project of the Year: UH Home Care Integration** (September)
      - Eaton Corporation in Beachwood
    7. **Simultaneous Leadership** (October)
      - Westfield Insurance in Westfield Center

Please let us know if your company would be interested in sponsoring a meeting location in the future!

- **PMO Breakfast Forum** – Two meetings were held in 2016 that focused on engaging Project Management Executives and Directors, Program Managers, and PMO Managers.
  1. Ohio Aerospace Institute in Cleveland: The topic was NASA: Mission, Organization, and Payoff – October 4, 2016
  2. Holiday Inn in Independence: The topic was the Cleveland Success Story in hosting the 2016 Republican National Convention – November 17, 2016
- **PM Roundtable:** A breakfast meeting was held in August focused on “Managing Remote Resources”. The event was held at the Panera Bread in Brooklyn.
- **Golf Outing** – A chapter golf outing was held on September 12 at the Washington Golf Course in Newburgh Heights.
- **Networking Events** – Two networking events were held in 2016 at the 750ml Wine Bar in Brecksville. The first event was held on April 28 and the second event was held on October 6.
- **PMP Study Groups**, held three times each year, for which participants were required to pay the cost of materials only. Each iteration of the Study Groups is comprised of 13 sessions. Participants received 3 PDUs per session for a total of 39 credits if they attend all 13 sessions. Many PMI Global or Northeast Ohio Chapter members took the class in 2016 with a very high percentage acquiring their credentials thereafter.
- **Seminars with our Registered Education Providers (REP) partners**, who offer discounts for chapter members. These events are held throughout the year. Some of titles for 2016 included “Understanding and Capitalizing on the Benefits of an Agile Approach to ALL Projects”, “The Strategic PMO - Building a Competitive Advantage”, “Scheduling, Risk Management, and Agile Applications Trifecta Webinar Series”, and many more.
- **Project Management Development** at Baldwin Wallace as part of their Advance project Leadership Certificate Series. On average, three different subjects are covered each month. Topics have ranged from Eliciting and Documenting Requirements to The Future of Project Management and everything in between.
- **Monthly newsletter:** We began the year publishing a monthly “Messenger” email newsletter. We moved these monthly updates to our updated website mid-year. These updates typically include chapter news, program and partner events, and PDU opportunities.

- **Job Openings / Job Seeker “Elevator Speeches,”** at most chapter meetings prior to the main presentation.
- **Partnerships with Other Associations** – The chapter continued its relationship with other professional organizations in Northeast Ohio. Many of these are listed on our website. They include the American College of Healthcare Executives (ACHE), Cleveland Agile Group, Cleveland Engineering Society, Cleveland Institute of Business Analysts, Cleveland Northern-Ohio INCOSE Chapter, HIMSS Northern Ohio Chapter (NOHIMSS), NEO Society for Technical Communication, Ohio County / City Information Technology Association, and Software Quality and Test Management (SQTM).
- **Social Media Networking,** to stay connected with Chapter events and network with other members. Members can join our four Chapter social media networks - LinkedIn, Facebook, Twitter, and Instagram – by visiting our Chapter website’s home page at [www.pmineo.org](http://www.pmineo.org), and selecting the social media icons on the right corner of the page under the navigation menu. You can also reach the PMI YouTube feed using an icon in that same location.

We strive to provide outstanding programming and services for project management professionals with all levels of experience, including the student or novice project manager, the program/portfolio manager, and the corporate executive. This is reflected in our members’ feedback, indicating that the top reasons they join the chapter are for professional development, networking opportunities, credential study groups, and to keep up on the latest news in project management.

### **Recognizing Our Chapter Sponsors**

The quality of our programming wouldn’t be the same without the investments from our premier partners. The following organizations deserve your support in return for all the great things they underwrote for the chapter in 2016:

- Synergy Consulting Group, Inc.
- Experis
- Apex Systems
- TEK Systems
- GR8PM
- Modis
- Roeder Consulting
- Lambert Consulting
- Velociteach
- Project Management Consulting Services (PMCS)
- IT Metrics and Productivity Institute (ITMPI)

We also want to recognize all of our engaged corporate sponsors at our top companies around the Northeast Ohio. This includes Progressive Insurance, Westfield Insurance, Acumen Solutions, Baldwin Wallace University, University of Akron, Federal Reserve Bank, Eaton, Rockwell, Nestle USA, Hyland Software, and Walsh University!

### **Giving Back to the Community**

The chapter partnered with the PMI Education Foundation in 2016 to award a scholarship to an aspiring project management professional. This year's award of \$2,000 was given to Adrian Bell, a Biomaterials and Tissue Engineering undergraduate student at the University of Akron.

### **Project Management Professional Transitions/Opportunities**

Our chapter wants to be the “*Destination of Choice for Project Management Opportunities in the Cleveland Metro Area.*” Therefore, whether you are a job seeker, staffing firm, or employer, we urge you to take advantage of the following services:

1. **Job Board**, for posting your open positions on our Chapter website, at <https://pmineo.org/career-development/job-bank>
2. **North Coast Job Seekers (NCJS)**, which focuses on solutions for those who are in (or contemplating) a career transition. For more information on this valuable member program see our website at: <https://pmineo.org/career-development/job-seekers>  
More information about NCJS can be found at their website:  
<https://www.northcoastjobseekers.org/>
3. **PMI Northeast Ohio Chapter Linked-In Group**, to get additional exposure for a newly posted job (or to advertise openings) at [www.linkedin.com/groups?gid=47526](http://www.linkedin.com/groups?gid=47526). We encourage employers and staffing firms to post opportunities in both places, since there are over 1,400 chapter members (and guests) in the Chapter's Linked-In Group.
4. **PMI Northeast Ohio Chapter Facebook Page**, (<https://www.facebook.com/groups/46521307331/>), which we use to communicate upcoming Chapter events to our members.
5. **Chapter Twitter Account** (<https://twitter.com/neopmi>), which we also use to communicate upcoming Chapter events to our members
6. **Chapter Instagram Account** (<https://www.instagram.com/pminortheastohio>).

## Chapter Administration

Administratively, the Chapter is focused on getting the right things done to ensure our longevity, fiscal prosperity and transparency. Here are some of our 2016 highlights:

- Our January Chapter Leadership Meeting focused on Blueprint 2020, current areas of focus, financial updates, and annual planning. Our focus is to constantly monitor what we are doing in order to improve our chapter in the upcoming year. The 2016 meeting was held at Nationwide in Highland Hills.
- We attended both the Regional and National Leadership Development Meetings and brought back initiatives, procedures and concepts that continue to raise the bar for member value.
- We successfully transitioned to a new chapter website in 2016. We encourage all members to explore the site (<https://pmineo.org/index.php>). Feedback is welcome.

## Chapter Guest Pass Program

The Chapter Guest Pass program continues to be a part of PMI's effort to support chapter sustainability. This program introduces PMI members who have not yet joined their local chapter to discover the benefits and the value of participation at no additional cost for the remainder of their membership cycles. The net effect of the introduction is intended to positively impact overall retention and growth.

The program allows PMI members who have not yet joined their local chapter to try out chapter membership for free.

We have signed up 19 new chapter members in 2016 with this process.

## Strategic Alignment

The PMINEO Governance Board and Operations Board met in March to evaluate our strategic plan. The group reaffirmed our strategic plan, **PMINEO Blueprint 2020**, which highlights key priorities for our members, partners and chapter operations. These key priorities were further refined to highlight key areas of focus for 2016. These areas of focus included the following:

- **Provide Membership Engagement** – Chapter programming must be provided that captures the interest of our members and helps them grow professionally. Membership engagement also encourages members to be involved in the operation of the chapter on a day-to-day basis.
- **Increase Membership Value** - We want our members to get the best programming and career development possible at a reasonable price. The cost to a member in 2015 for each PDU earned through chapter events was \$5.83.

This is significantly better than the goals that were set at the beginning of the year and highlight the value being provided to chapter members. Our hope is that membership retention will increase in 2016 as a result of the value that is being delivered.

- **Engage Companies at the Executive Level** – It is vital that we engage companies at the executive level to achieve our mission of promoting the project management profession. Our chapter must adapt to the needs of Northeast Ohio companies. This necessitates engagement that listens to those who hire our members. This engagement also allows the chapter to educate leaders on the value that our members can bring to their organizations.
- **Provide Sponsor Value** - Our sponsors support our chapter through financial and in-kind services. We need to articulate a clear value-proposition to current and prospective sponsors, which will enable us to diversify our income stream. Significant progress has been made in this area over the past year. Chapter revenue generated by sponsorship increased by over 35% in 2015.

Other strategic priorities outlined in **PMINEO Blueprint 2020** include the following:

- Grow membership
- Improve membership retention
- Engage students
- Diversify sponsorship base
- Strengthen chapter governance
- Diversity Income Stream
- Strengthen operational procedures
- Extend our geographic base

A scorecard was developed and updated throughout the year to measure chapter progress against established areas of focus as well as the other strategic priorities. Some of the output of our chapter scorecard is reflected in the focus area results above. This type of data is vital to better understanding operating results and formulating appropriate responses.

The Governance Board will continue to discuss and tweak our strategy over time. The Operations Board will continue to align our programming with this strategy, availability of volunteer resources, and the results of previous programming.

This list of priorities certainly doesn't capture all of the strategic and tactical objectives / activities within the chapter. As a volunteer organization, it is vital that we give our operations team the autonomy to do what needs to be done within the context of their respective roles. Our strategic plan is simply a framework to guide our activities while clearly communicating strategic priorities to our membership. We are confident this long-term vision for the chapter, along with the scorecard will enable our already successful chapter to further enhance membership value. In addition this framework

will make a rewarding experience for our chapter volunteers and prepare our next generation of leaders.

### Financial Operating Results

Financially, our PMI Northeast Ohio Chapter is on stable ground. The chapter is incorporated under a 501-C6 filing (for professional associations), and our bylaws require that we operate under a balanced budget. Every year, we create a budget, where revenues essentially equal expenses. In 2016, we were profitable with a net income of \$21,754. This year's profit contributes to our savings account, which allows us the flexibility for future investment in well-justified special initiatives.

	Total
<b>Income</b>	
Interest Earned	\$ 66
Membership Dues	\$ 36,015
Membership Income	\$ 220
Total Miscellaneous Income	\$ 50
Total Non Profit Income	\$ 14,094
Total Program Income	\$ 22,480
<b>Total Income</b>	<b>\$ 72,926</b>
<b>Gross Profit</b>	
	\$ 72,926
<b>Expenses</b>	
Total Career Development	\$ 5,322
Total Executive Programs	\$ 844
Total Governance	\$ 13,115
Total Marketing-Communications	\$ 7,340
Membership Expenses	\$ -
Total Chapter Meetings	\$ 4,011
Total Chapter Programs	\$ 15,529
Social Events	\$ 280
Total Membership Expenses	\$ 19,820
Miscellaneous	\$ 109
Total Operating Expenses	\$ 2,421
Total Student Leadership Program	\$ 2,200
<b>Total Expenses</b>	<b>\$ 51,172</b>
<b>Net Operating Income</b>	<b>\$ 21,754</b>
<b>Net Income</b>	<b>\$ 21,754</b>

### To Summarize

You belong to a robust Chapter, with highly effective volunteers that take pride in maximizing your member value. Our experienced professionals, whether members or volunteers (and sometimes both) are focused on the fundamentals that support our mission, which is to “**Promote project management** as a recognized discipline by creating an environment that fosters professional development through continued learning, networking, and support of project managers.”

Thank you for your continued support. We hope to see you at our events in 2017. We value your input. If you have additional questions, please do not hesitate to reach out to any Chapter volunteer or to me personally.

Respectfully,



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