



Phoenix Chapter

Building professionalism in project management ®

The 2007 – 2008 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.

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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 2007 – 2008 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 2007 – 2008 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.

The Strategic Operating Plan of Phoenix PMI

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. Sustain the chapter 2. Provide a communication forum 3. Provide education and support certification 4. Encourage professional development 5. Function with operational excellence 6. Promote the profession in the community 7. Add value for members 8. Raise the bar 	
DEPARTMENTS	
Communications	Website/Online Community * Weekly Bulletins * Quarterly Newsletters * Job Postings
External Relations	Corporate Outreach * Project of the Year & Top 10 Employer Awards * Academic Outreach * Community Outreach
Finance	Budgeting & Accounting * Compliance with Fiduciary Requirements * Effective Finance Services
Membership	Membership Orientation * Volunteer Opportunities * Membership Survey * Recognition Programs (CAPM, PMP, PgMP) * Ambassador Program
Operations	Strategic Planning * Preserve Chapter Records * Board of Director Meetings * Operations Scorecard * Processes
Professional Development	Professional Programs/Training Opportunities * Certification Support (PMP, CAPM, PgMP) * PDU Opportunities * Mentorship Program
Programs	PDU opportunities * Speakers Selection/Programs Schedule * Chapter PDU Dinner Meeting
Project Management Office (PMO)	PMO experience for Members * PMO Resource center for Phoenix * Prioritized Chapter Projects * Project Status * Advanced Skills Seminars * PM Symposium

The Strategic Operating Plan of Phoenix PMI

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.

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3.0 Strategic Priorities

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

1. Sustain the chapter
2. Provide a communication forum
3. Provide education and support certification
4. Encourage professional development
5. Function with operational excellence
6. Promote the profession in the community
7. Add value for members
8. Raise the bar

4.0 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
- Finance
- Membership
- Operations
- Professional Development
- Programs
- Project Management Office (PMO)

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4.1 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 Weekly Bulletins and Quarterly Newsletters to chapter members through email correspondence
- Review Website Usage statistics
- Maintain an active listing of job postings on the Phoenix PMI website

For more information about Phoenix PMI Communications, please contact:

Dimitri Ponomareff, PMP

VP of Communications

Communications@phx-pmi.org

View our Chapter Website at: <http://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 and, in doing so, help build a world-class chapter. To achieve Phoenix PMI's mission, we will:

- Present 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 sponsor relationships for support of chapter events and initiatives through PMI Corporate Outreach
- Provide Scholarships 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 charitable 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:

Erika Flora, MS, PMP

VP of External Relations

ExternalRelations@phx-pmi.org

View the External Relations Website: at: <http://phx-pmi.org> under the External Relations tab

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4.3 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, and effective services for PMI members and leadership

For more information about Phoenix PMI Finance, please contact:

Glen Davis, PMP

VP of Finance

Finance@phx-pmi.org

View the Phoenix PMI Website at: <http://phx-pmi.org>

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4.4 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 Membership Orientation Events to welcome and educate new members to chapter
- Alert members to volunteer opportunities
- Host an annual holiday event for chapter members
- Conduct an annual membership 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 & PGM)
- Conduct a New PMP/CAPM/PgPM Recognition Program
- Start new Ambassador Program to greet members at meetings and chapter events
- Coordinate the Chapter's Applications for Component Awards

For more information about Phoenix PMI Membership, please contact:
Robert Binkley, PMP
VP of Membership
Membership@phx-pmi.org

View the Membership Website at: <http://phx-pmi.org> under the Membership tab

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4.5 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

For more information about Phoenix PMI Operations, please contact:
Annette Romei, PMP
VP of Operations/Secretary
operations@phx-pmi.org

Learn about Phoenix PMI at: <http://phx-pmi.org> under the About tab

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4.6 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), and Program Management Professional (PgPM) certifications including certification preparation courses
- 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
- Offer all Chapter members outstanding 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: <http://phx-pmi.org> under the Professional Development tab

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4.7 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

For more information about Phoenix PMI Programs, please contact:
Mufazzal Badani, PMP
VP of Programs
Operations@phx-pmi.org

View the Programs Website at: <http://phx-pmi.org> under the Programs tab

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4.8 Project Management Office (PMO)

Phoenix PMI is pleased to hold the inaugural 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
- Create a resource center for PMOs in the Phoenix area
- Ensure that the Chapter's initiatives are prioritized and managed by maintaining an active list of Phoenix PMI chapter initiatives and supporting projects
- Review current project cost and schedule status and charter new initiatives
- Ensure chapter projects are planned and staffed with appropriate PM and team coverage
- Support Advanced Skills Seminars and PM Symposium efforts

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

Hal Korff, PMP
VP of the Program Management Office
PMO@phx-pmi.org

View our Chapter Website at: <http://phx-pmi.org>

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5.0 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.

5.1 Chapter Operations Scorecard

Measuring our performance is key for evaluating our chapter's 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

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5.2 Chapter Development Progress

PHOENIX PMI CHAPTER DEVELOPMENT MODEL
Horizon (2007 & 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>• <i>Community Outreach Program</i>• <i>Symposium/Professional Development Day</i>• <i>Seminars</i>• <i>Additional Networking Events</i>• <i>Additional PDU Opportunities (i.e. Book Club, Webinars, etc.)</i>• <i>Sponsored Speaking Engagements</i>• <i>Program Management Professional (PgPM) Certification Preparation</i>• <i>Continued Certification Preparation (Wave of recerts)</i>• <i>Corporate Outreach</i>
Recent Additions (2006) <ul style="list-style-type: none">• <i>Online Job Postings (Free Postings for Companies)</i>• <i>Website Redesign/Maintenance</i>• <i>Chapter Newsletter</i>• <i>Chapter Volunteer Program</i>• <i>Membership Orientation Program</i>• <i>Recognition Programs (Volunteer of the Month, Volunteer of the Year, Annual Awards Dinner and Holiday Party)</i>• <i>1st PMI Component Project Management Office (PMO)</i>• <i>Student Outreach Presentations (ASU)</i>• <i>Annual Chapter Survey</i>• <i>Project Masters (Chapter Toastmasters Connection)</i>• <i>Top 10 Employer Program</i>
Phoenix Chapter Fundamentals <ul style="list-style-type: none">• <i>Monthly Professional Development Dinner Meetings</i>• <i>Professional Development Classes</i>• <i>PMP Exam Prep Course</i>• <i>Breakfast Meetings</i>• <i>Communications & Financial Reporting</i>

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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:

<http://phx-pmi.org>