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# PMI NORTH ALABAMA (PMI-NAC) STRATEGIC PLAN

# 2013 - 2015

Version 4.0

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# VERSION HISTORY

| Version # | Implemented By | Revision Date | Approved By | Approval Date | Reason |
|-----------|----------------|---------------|-------------|---------------|--------|
| 1 | Connie Wallace | 5/20/06 | PMI-NAC Board | 08/02/2006 | Initial Document |
| 2 | Lourdes Godfrey | 4/25/10 | PMI-NAC Board | | 2010 Update |
| 3 | Ron Steele | | PMI-NAC Board | | Annual review |
| 4 | Joe Paschall | 1/15/13 | PMI-NAC Board | | 2013 Update |
| 5 | | | | | |

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# 1   EXECUTIVE SUMMARY

As a chartered chapter of the Project Management Institute, the PMI-NAC Strategic Plan aligns with the PMI Global Strategic Plan. The chapter derives its vision and mission from the PMI long term vision for project management, namely that, "Worldwide, organizations will embrace, value and utilize project management and attribute their success to it".  The PMI North Alabama Chapter (PMI-NAC) strategic plan defines the chapter's commonly shared vision, mission, values and guiding principles. In addition, this plan provides the chapter leadership with a management tool for consistent direction, metrics and a picture of what success will look like in the future.

# 2   MISSION

To establish the foundation for its objectives and strategies the Board articulated the chapter mission as follows:

***"To enhance the Project Management knowledge and skills of project management practitioners in North Alabama such that they and their employers consider these skills indispensable to the execution of their company strategies and business success."***

# 3   VALUE PROPOSITION

To encourage members and local corporations to participate in activities sponsored by the chapter and encourage participation in the chapter as members or sponsors, the chapter has articulated its value proposition as follows:

1.  Serve as a credible resource and innovator for Project Management knowledge, training, trends and practices in North Alabama.

2.  Develop partnerships and strategic alliances with North Alabama organizations for the successful practice of Project Management.

3.  Provide value to members through the provision of cost-effective preparation for, and maintenance of, the PMI Family of Credentials.

# 4   ORGANIZATION PROFILE AND HISTORY

PMI-NAC is a component of the Project Management Institute; an international professional association for project managers.  Since its original charter as the Tennessee Valley PMI Chapter in 1990, additional PMI Chapters have been established in Memphis, TN; Nashville, TN; Chattanooga, TN, Knoxville, TN; Atlanta, GA, Birmingham, AL, and Mobile, AL.   In July 2002, the chapter was incorporated in the State of Alabama and its name was officially changed to PMI – North Alabama Chapter to better reflect the region that the chapter serves.  PMI-NAC has had significant growth since its inception in 1990. The chapter membership grew gradually through 2004 when it ended the year with 131 members and 83 Project Management Professionals (PMPs).  Over the next 8 years, the chapter grew considerably as a reflection of the growth of the local area and growth in

the profession of Project Management.  As of December 2012, the chapter has 548 members, with over 360 PMPs.  The growth of the past decade is illustrated in the membership chart below.
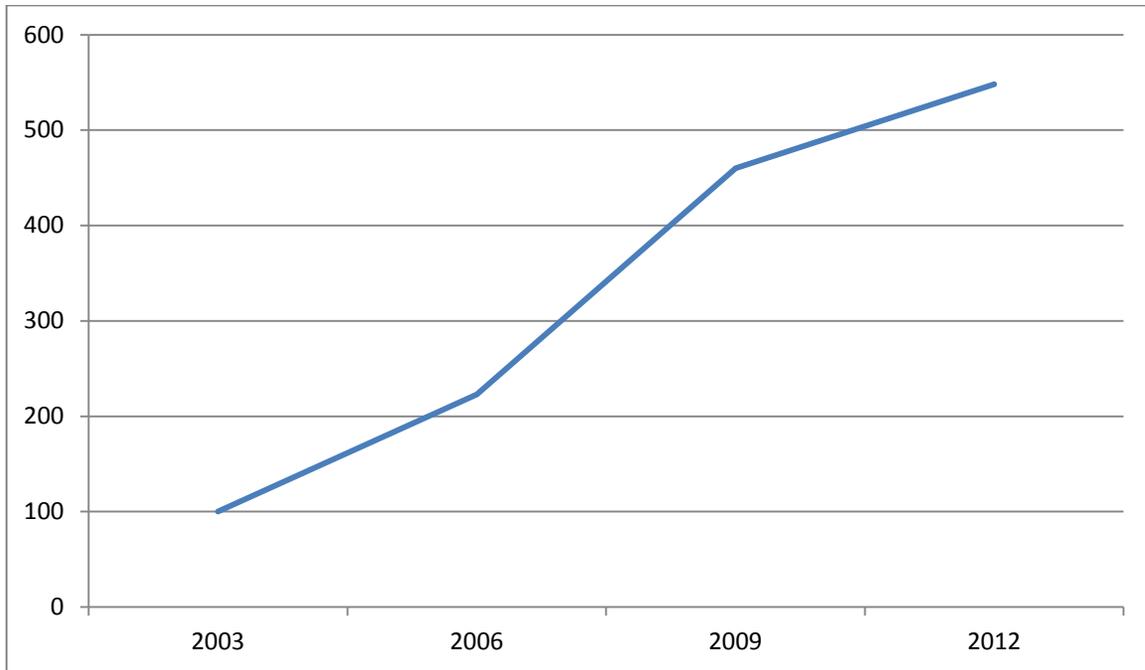


This growth also mirrors similar growth by PMI Global and reflects the success of PMI as a whole in promoting the benefits of project management and the benefits of credentialing.  Research by PMI Global indicates that individuals drop their membership in PMI once they achieve their certification because the value proposition for maintaining the membership is no longer there.  They can maintain the certification just as easily and less expensively without the PMI membership.  This is a challenge the chapter attempts to address by offering high-quality, low-cost continuing education seminars incorporated in a lunch meeting format to facilitate attendance and attract future members.
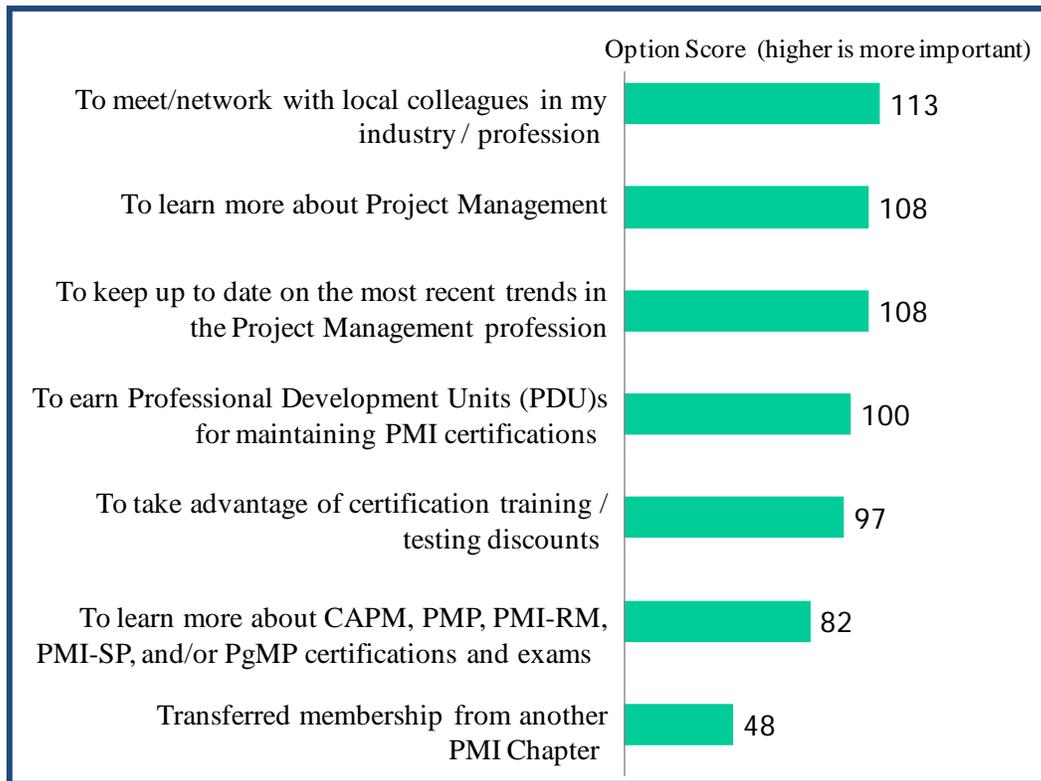
# 5   CURRENT ENVIRONMENT

The north Alabama region benefits from numerous federal programs that are managed by the U.S. Army Redstone Arsenal, Army Corps of Engineers, Tennessee Valley Authority (TVA) and NASA Marshall Space Flight Center (MSFC).  The Huntsville, AL area has recently benefited from Base Closure and Realignment Commission (BRAC) decisions and commercial ventures from the automotive, retail distribution and bio-medical industries.  The chapter benefited in 2008-2010 in part due to BRAC relocations which also brought the relocation and reorganization of Industry counterparts.   With the BRAC relocations now settled, the Board analyzes the major employers of our members compared to the major employers in our community.

| Company | Number of Members |
|---|---|
| SAIC | 35 |
| DRS Technologies | 22 |
| US Army | 19 |
| Intergraph | 16 |
| Northrop Grumman | 14 |
| Jacobs | 13 |
| US Army Corps of Engineers | 12 |
| Booz Allen Hamilton | 12 |
| BCF Systems | 10 |
| Boeing | 9 |
| Continental | 9 |
| Dynetics | 9 |

This comparison will help identify potential opportunities for corporate sponsorships as well as companies to reach out that may be under represented in our membership.  A chart showing this comparison is adjacent.

The chapter currently provides a variety of professional development opportunities, including monthly meetings, PMP Exam Preparation courses, and one- and two-day seminars.   Recent experience has shown that in tough economic times the demand for seminars may wane.   However, the demand for low-cost PMP Preparation Courses remains steady or increases slightly.   To marry our efforts with demand, we will be focusing more towards cost effective and timely certification Preparation Courses than day long seminars.

Our annual membership survey asks our members what benefits they receive from the chapter.  The answers to this survey question were very similar to a question asked of PMI members worldwide by PMI global, and are illustrated in the chart below.  A subsequent question asks members how well the chapter is meeting their needs relative to the reasons and benefits expected when they joined PMI-NAC.  Per our last survey, eighty percent (80%) said they were satisfied that the chapter was meeting their needs. While this is good, the rapid growth of the chapter cautions that needs may change, and the Board must be prepared to address the expanding needs of our members.  We will use our January Town Hall Meeting to provide feedback that might be used to better craft our offerings to meet the needs of the Chapter, and will additionally re-issue the survey later in the year to glean better feedback and update the baseline as required.

Option Score (higher is more important)

| Reason | Score |
|---|---|
| To meet/network with local colleagues in my industry / profession | 113 |
| To learn more about Project Management | 108 |
| To keep up to date on the most recent trends in the Project Management profession | 108 |
| To earn Professional Development Units (PDU)s for maintaining PMI certifications | 100 |
| To take advantage of certification training / testing discounts | 97 |
| To learn more about CAPM, PMP, PMI-RM, PMI-SP, and/or PgMP certifications and exams | 82 |
| Transferred membership from another PMI Chapter | 48 |

## 6   CHAPTER OPERATING ENVIRONMENT AND ANALYSIS

- The chapter is in a healthy position, having experienced membership growth and a strong financial status over the past 5 years.

- Approximately 50-70 people attend each monthly meeting

- The chapter has 548 members as of 5 December, 2012.

- The chapter has 360 PMPs, 3 CAPMs, and 3 PgMPs as of December, 2012.

- The chapter has approximately $89,000 in cash as of December 31, 2012 of which approximately $50,000, representing two years of operating expenses, are held in reserves in an interest bearing account.  The remainder is held as operating capital to allow the chapter to operate in the seasonal cycles of cash.  These seasonal cycles relate to months in between PMP exam preparation classes which are a major source of revenue for the chapter.

- The volunteer base is currently at about 26 Assigned Volunteers with an additional 13 Instructors in a pool.

- There are three in-kind sponsors who provide web site hosting, technical support and database services. As the sole Gold sponsor for the chapter, AEgis provides the venue for monthly luncheons.

# 7 LONG-TERM STRATEGIC OBJECTIVES

To effectively achieve PMI-NAC vision and mission, the following long-term strategic objectives were developed. These strategic objectives reflect our vision for the chapter in 3-5 years.

1. Provide a means for members to improve their project management knowledge and skills

2. Initiate and institutionalize mechanisms for sharing resource skills and knowledge among project management practitioners

3. Create an environment for support, networking, and mentoring among project management professionals

4. Work with local organizations and academia to advance the understanding and acceptance of project management

5. Establish relationships with similar professional organizations to share ideas

6. Implement sound organizational policies, procedures, processes, and tools to support the growth of the chapter, and position it to operate more efficiently and effectively in the future.

# 8 ANNUAL PLAN FOR 2013

After reviewing the information regarding the local and national environment, membership survey feedback from previous years, summary feedback received through the monthly meeting feedback forms, analysis of membership data, and reviewing accomplishments from the past year, the Board of Directors conducted an annual planning session. The results of the session yielded the following board goals.

### VP Administration

Continue to support the board through

- Maintaining prompt, clear communication of board meetings.
- Providing minutes and agendas a minimum of 1 day in advance of board meetings to allow for feedback / adjustment to agenda.
- Establishing a committee to be in charge of the annual Awards Event.

### VP Communications

Contribute to an increased engagement of membership through improvements in the quality, frequency and medium of Chapter Communications.

### VP Finance

Continue to provide a stable financial basis for the Chapter through maintaining accurate financial records and managing individual events to profitability.

### VP Membership

Increase membership in the Chapter and increase member engagement through increasing level of participation in luncheons and social events.

### VP Professional Development

Expand the chapter sphere of influence in professional development by providing innovative ways for members to earn PDUs:

- Work in conjunction with the VP of Programs.
- Maintain/increase awareness of the chapter's PMP preparation course to existing members and corporate entities.
- Identify and incorporate newly certified PMP's as instructors for the chapter PMP preparation course.
- Establish voluntary attended study sessions for course participants during and after the official course
- Establish PMP exam passage metrics to use as a marketing tool for the chapter PMP preparation course.

### VP Programs

Provide a range of informative and educational programs to address chapter member needs to:

- Maintain awareness of program management trends and challenges to contribute to professional growth and individual development.
- Recognize member excellence in project management.
- Stimulate interest in and increase participation in chapter events.

### VP Volunteers

Continue to support the Chapter and Board:

- Revise and reengage the policies and procedures for soliciting, in-processing and supporting volunteer structure.
- Design and implement transition policies for each board position.
- Revitalize the Communications branch by working with the VP Communications to establish clear duties, roles, descriptions and hierarchy.