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Project Management Institute  
Washington DC Chapter (PMIWDC)

Strategic Plan

2010 - 2014

**Final**

July 14, 2009

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## EXECUTIVE SUMMARY

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The purpose of this document is to establish the Strategic Plan for the Project Management Institute Washington DC (PMIWDC) chapter. It establishes the vision, mission, values, and strategic objectives of the chapter. Also included are the goals and strategic objectives of the Project Management Institute Global Operations Center (PMIGOC). The last section of the document maps the PMIWDC strategic objectives to PMI's objectives and describes how those objectives will be met through current and future initiatives of the chapter. It also includes the owner of each initiative.

The development of this plan was initiated by the 2009 Governance Board. One of the key responsibilities of the Governance Board is to establish the strategic direction of the chapter. A strategic planning consultant met with the Governance Board in January 2009 to advise them on the planning process. The board spent several months revising the chapter's vision, mission, values and objectives. The horizon for the plan is five years (2010 – 2014).

The intent of the plan is to set the direction for the chapter's annual operations planning cycle. Using the Strategic Plan, the Operations Board will develop plans and budgets each year that are aligned with the Strategic Plan. Each year, the Governance Board will review the Strategic Plan and revise as necessary. The target is to always maintain a plan that sets the chapter's direction five years into the future.

The 2009 Governance Board respectfully submits this Strategic Plan:

Linda Cantey – President/CEO  
Richard Marinucci – President-Elect/COO  
Tom Bishop – CFO  
Shirley Buchanan – Director at Large  
Roy Burton – Director at Large  
John Cormier – Director at Large  
David Offenkrantz – Director at Large  
Barbara Polansky – Director at Large  
Bruce Shaw – Trustee

## PMIWDC VISION, MISSION, AND VALUES

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### **Vision<sup>1</sup>**

To promote exceptional project management.

### **Mission<sup>2</sup>**

To promote the profession of project and program management among our members and within our communities; Offer opportunities to educate, connect, and develop leaders of today and tomorrow.

### **Values**

We enable our stakeholders by providing high-quality education and programs to:

- Promote effective Project and Program Management practices,
- Honor volunteerism,
- Achieve positive results for Business, Government, and Educational environments,
- Share exceptional practices,
- Engage our communities, and
- Make connections through social interactions and state-of-the art technology.

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<sup>1</sup> The Vision states what we want to be; the Vision may change over time.

<sup>2</sup> The Mission states who we are and what we do; the Mission does not change over time.

## **PMIWDC STRATEGIC OBJECTIVES**

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### **PMIWDC Strategic Objectives<sup>3</sup>:**

1. Promote the practice of the profession of Project Management.
2. Provide opportunities for the project management education and professional development.
3. Provide a framework for professional networking and social interaction.
4. Promote the value of project management to the corporate, government, and greater project management community.
5. Be an effective conduit from our membership and the immediate project management community to PMIGOC.
6. Implement operational, marketing, and business development strategies to support the chapter's strategic objectives.

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<sup>3</sup> The Objectives state our long-range performance targets. Initiatives that are mapped to these Objectives in the Strategic Map provide the steps to meet our Objectives.

## **PMIGOC GOALS AND STRATEGIC OBJECTIVES<sup>4</sup>**

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### **Stakeholder Intimacy**

- Strengthen stakeholder loyalty
- Provide knowledge and tools with great service
- Demonstrate benefits from project management

### **Internal Business Processes**

- Facilitate innovative thinking and exchange of ideas
- Provide the means to improve the practice of project management
- Develop mutually advantageous and trusting relationships
- Champion project management adoption and maturity

### **Culture and Capabilities**

- Make PMI a customer-centric organization
- Make leadership excellence a strategic competency
- Make market and business development a strategic competency

### **Resources**

- Leverage resources and investment in the marketplace
- Maintain financial viability

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<sup>4</sup> These Goals and Strategic Objectives were provided by PMI GOC.

# PMIWDC STRATEGIC MAP

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
Stakeholder Intimacy	Strengthen stakeholder loyalty	PMIWDC Objectives 1, 2, 3, 4, 5, and 6	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Identify all stakeholders and determine which stakeholders are relevant to the loyalty issue</li> <li>○ Conduct membership surveys to determine needs and satisfaction</li> <li>○ Strive to meet member needs identified in the survey and through other methods</li> <li>○ Ensure excellence in regular communication with the membership through the E-newsletter, website and other methods</li> <li>○ Provide suggestion box on website for member suggestions</li> <li>○ Provide digital video and audio recordings of dinner meetings</li> <li>○ Provide access to LinkedIn for members</li> <li>○ Sponsor “Career Day” for education and outreach</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Expand the number of PDU offerings to help meet demand</li> <li>○ Provide digital video and audio recordings and podcasts of PMTools and other “PDU” meetings</li> <li>○ Engage members to find out what their organizations want PMIWDC to do to help the members and the member’s organizations</li> <li>○ Revamp website</li> <li>○ Host a recruiter panel/roundtable to provide career advice</li> </ul>	<ul style="list-style-type: none"> <li>○ Board and Staff</li> <li>○ VP Membership</li> <li>○ Board and Staff</li> <li>○ VP Marketing/PR, VP Technology, Board and Staff</li> <li>○ VP Technology</li> <li>○ VP Networking Programs, VP Technology</li> <li>○ VP Technology</li> <li>○ VP Membership</li> <li>○ VP Networking Programs, VP Professional Dev</li> <li>○ VP Networking Programs, VP Professional Dev, VP Technology</li> <li>○ VP Outreach</li> <li>○ VP Technology</li> <li>○ VP Networking Programs</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	Provide knowledge and tools with great service	PMIWDC Objectives 2 and 3	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Conduct monthly luncheon meetings</li> <li>○ Conduct PM Tools meetings prior to dinner meetings</li> <li>○ Conduct monthly dinner meetings</li> <li>○ Conduct quarterly breakfast meetings</li> <li>○ Conduct periodic seminars</li> <li>○ Conduct Knowledge Exchange Forums</li> <li>○ Conduct PMP and CAPM exam prep courses</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Expand luncheon meeting venues</li> <li>○ Expand seminar offerings</li> <li>○ Offer PgMP, Risk, and Scheduling credential exam prep courses</li> <li>○ Provide on-line knowledge sharing for members</li> <li>○ Establish a “book of the month” program where members can see reviews of PM books (from the membership) on our website</li> <li>○ Reorganize SharePoint to improve ease of use and overall knowledge management</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Networking Programs</li> <li>○ VP Networking Programs</li> <li>○ VP Networking Programs</li> <li>○ VP Networking Programs</li> <li>○ VP Professional Dev</li> <li>○ VP Professional Dev</li> <li>○ VP Professional Dev</li> <li>○ VP Professional Dev</li> <li>○ VP Networking Programs</li> <li>○ VP Professional Dev</li> <li>○ VP Professional Dev</li> <li>○ VP Technology, VP Professional Dev</li> <li>○ VP Membership</li> <li>○ VP Records Management</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	<p>Demonstrate benefits from project Management</p>	<ul style="list-style-type: none"> <li>o PMIWDC Objectives 1 and 4</li> </ul>	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>o Develop and maintain presentations on the value of project management and of PMIWDC</li> <li>o Maintain a cadre of speakers who are qualified to deliver presentations on PMI, the Chapter and the benefits of project management</li> <li>o Support annual meetings of our strategic alliance partners and other relevant organizations</li> <li>o Be a resource for business and civic organizations on the benefits of project management and certification</li> <li>o Participate in government, commercial, and civic events to present PMI literature and promote project management</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>o Expand the Chapter's strategic alliance program</li> <li>o Expand the Chapter's corporate outreach program</li> <li>o Act as a liaison between the Chapter and government performance management initiatives</li> </ul>	<ul style="list-style-type: none"> <li>o Board and Staff</li> <li>o Board and Staff</li> <li>o VP Outreach</li> <li>o Board and Staff</li> <li>o Board and Staff, VP Outreach</li> <li>o VP Outreach</li> <li>o VP Outreach</li> <li>o Board and Staff</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
Internal Business Processes	Facilitate innovative thinking and exchange of ideas	PMIWDC Objectives 3 and 4	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Create and support outreach programs to reach members and the existing and potential project management community</li> <li>○ Provide innovative networking opportunities for the existing and potential project management communities</li> <li>○ Maintain and grow our chapter to chapter program</li> <li>○ Offer member Knowledge Exchange Forums</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Offer opportunities for our members' ideas and papers to be published</li> <li>○ Offer opportunities for our members to present at project management conferences</li> <li>○ Expand speaker's database and share with other chapters, strategic alliances, and project management stakeholders</li> <li>○ Optimize SharePoint structure to facilitate Board collaboration</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Outreach, Board and Staff</li> <li>○ VP Networking Programs, VP Membership</li> <li>○ VP Outreach</li> <li>○ VP Professional Dev</li> <li>○ Board</li> <li>○ Board</li> <li>○ VP Networking Programs</li> <li>○ VP Records Management</li> </ul>
	Provide the means to improve the practice of project management	PMIWDC Objectives 2, 3, and 4	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Conduct PMP and CAPM preparation courses</li> <li>○ Provide opportunities for those looking for employment to meet with those who are hiring; including posting job openings on Chapter web site</li> <li>○ Provide opportunities for members to engage in fulfilling volunteer roles.</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Expand professional development offerings</li> <li>○ Expand website to provide a PM knowledge base</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Professional Dev</li> <li>○ VP Membership, VP Marketing &amp;PR</li> <li>○ Board and Staff</li> <li>○ VP Professional Dev</li> <li>○ VP Technology</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	Develop mutually advantageous and trusting relationships	PMIWDC Objectives 4 and 5	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Share information with other chapters</li> <li>○ Maintain a strong volunteer coordination program</li> <li>○ Maintain a productive relationship with GOC</li> <li>○ Support GOC in their congresses and events</li> <li>○ Offer a leading role in Region 5 activities</li> <li>○ Support luncheon and community venues with other local chapters (e.g. Frederick w/ Baltimore)</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Work closely with PMI's virtual communities to establish LIGs</li> <li>○ Develop programs in alternate languages</li> <li>○ Conduct Board team building sessions</li> </ul>	<ul style="list-style-type: none"> <li>○ Board and Staff</li> <li>○ VP Volunteer Coordination</li> <li>○ Governance Board</li> <li>○ Governance Board</li> <li>○ Governance Board</li> <li>○ VP Networking Programs</li> <li>○ VP Outreach</li> <li>○ Board; VP Networking Programs</li> <li>○ Board</li> </ul>
	Champion project management adoption and maturity	PMIWDC Objective 6	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Keep bylaws current with best practices</li> <li>○ Review bylaws annually and update as necessary</li> <li>○ Map all Board activities to meeting the strategic objectives of the Chapter</li> <li>○ Continually communicate advantages of project management</li> <li>○ Ensure that the Boards meets face-to-face several times each year to encourage collegiality</li> <li>○ Ensure conformance with the Chapter's Event Management Process</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Establish a "Bring your Boss to Dinner" event where management and C-Level executives can get familiar with the chapter, as well as the profession, and the benefits of both</li> </ul>	<ul style="list-style-type: none"> <li>○ Governance Board</li> <li>○ Governance Board</li> <li>○ Governance Board</li> <li>○ Board and Staff</li> <li>○ President/President-Elect</li> <li>○ VP Business Services</li> <li>○ VP Networking Programs</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
Culture and Capabilities	Make PMI a customer-centric organization	PMIWDC Objectives 1, 2, 3, 4, and 5	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Conduct membership surveys</li> <li>○ Conduct volunteer surveys</li> <li>○ Encourage members to participate in PMI and Chapter activities</li> <li>○ Support PMI activities and contribute to initiatives such as developing standards and providing opportunities for volunteers</li> <li>○ Maintain mentoring program</li> <li>○ Participate in periodic meetings with GOC</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Establish a photography team that can attend as many events as possible and photograph/document the event and its attendees for publication on the website and in PMIToday</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Membership</li> <li>○ VP Volunteer Coordination</li> <li>○ Boards and Staff</li>   <li>○ VP Professional Development, Governance Board</li> <li>○ VP Professional Dev</li> <li>○ Board and Staff</li>   <li>○ VP Business Services</li> <li>○ VP Marketing/PR</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	Make leadership excellence a strategic competency	PMIWDC Objectives 5 and 6	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Support Board participation in PMI leadership meetings, PMI Learn, and other means of developing leadership skills</li> <li>○ Involve volunteers in activities to support the chapter by delegating work, monitoring progress, and celebrating successes</li> <li>○ Maintain Board Orientation Handbook</li> <li>○ Sustain Leader Training Sessions</li> <li>○ Conduct Volunteer Orientation</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Make Board meeting minutes and the Board Handbook available to our membership</li> <li>○ Conduct Board orientation sessions several times during the fiscal year.</li> <li>○ Establish disclosure statement to be signed by all Board members</li> <li>○ Develop succession plan for leaders of all programs</li> <li>○ Improve content management of Chapter documents</li> </ul>	<ul style="list-style-type: none"> <li>○ Board</li> <li>○ Board and staff</li> <li>○ VP Volunteer Coordination</li> <li>○ VP Volunteer Coordination</li> <li>○ VP Volunteer Coordination and appropriate Board members</li> <li>○ Board and staff, VP Records Management</li> <li>○ Governance Board</li> <li>○ Governance Board</li> <li>○ Operations Board VPs and Executive Leaders</li> <li>○ VP Records Management</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	Make market and business development a strategic competency	PMIWDC Objectives 4 and 6	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Establish relationships with academic institutions and selected non-profit organizations</li> <li>○ Identify mutually advantageous opportunities with other organizations</li> <li>○ Sustain Corporate Outreach Coordinators</li> <li>○ Sustain sponsorship programs</li> <li>○ Sustain advertising programs</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Establish marketing and business development framework to support strategic objectives</li> <li>○ Establish conflict of interest policy</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Outreach</li> <li>○ Board and Staff</li> <li>○ VP Outreach</li> <li>○ VP Marketing &amp; PR</li> <li>○ VP Marketing &amp; PR</li> <li>○ Governance Board, VP Marketing &amp; PR</li> <li>○ Board</li> </ul>
Resources	Leverage resources and investment in the marketplace	PMIWDC Objectives 4 and 5	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Promote corporate tables for dinner meetings</li> <li>○ Promote corporate sponsors for chapter activities and sustained corporate support</li> <li>○ Promote corporate volunteer program</li> <li>○ Establish and promote scholarships</li> <li>○ Provide financial backing of other major Chapter events, i.e., Symposia, cruises, other special events that require cash up front and have a reasonable potential ROI for the Chapter</li> <li>○ Continue to support "Future Cities" initiative</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Use Chapter website to advance and expand Webinar offerings</li> </ul>	<ul style="list-style-type: none"> <li>○ VP Marketing &amp; PR</li> <li>○ VP Marketing &amp; PR</li> <li>○ VP Outreach</li> <li>○ VP Professional Dev</li> <li>○ Board</li> <li>○ VP Outreach (High School Outreach)</li> <li>○ VP Marketing &amp; PR</li> </ul>

Goals	PMIGOC Strategic Objectives	PMIWDC Strategic Objectives	Current and Future PMIWDC Activities	Owner(s)
	Maintain financial viability	PMIWDC Objective 6	<p><b>Current Activities:</b></p> <ul style="list-style-type: none"> <li>○ Develop business plans for all budgeted activities</li> <li>○ Approve plans and budgets based on applicable criteria (mapping to strategy, addressing priorities, etc.).</li> <li>○ Develop accurate and timely financial reports</li> <li>○ Follow proposal process when submitting unbudgeted requests and unforeseen commitments</li> <li>○ Solicit members to audit financial records annually, during the first quarter of fiscal year</li> <li>○ Provide a financial review / status to the full Board during their quarterly combined sessions.</li> </ul> <p><b>Future Activities:</b></p> <ul style="list-style-type: none"> <li>○ Develop process for redistributing / realigning budgeting activities</li> <li>○ Develop a "Reserve Plan"</li> <li>○ Develop succession plan for owners of key events/services</li> </ul>	<ul style="list-style-type: none"> <li>○ VPs</li> <li>○ Governance Board</li> <li>○ CFO, VP Finance</li> <li>○ Board</li> <li>○ CFO, VP Finance</li> <li>○ CFO</li> <li>○ Governance Board</li> <li>○ CFO</li> <li>○ Board</li> </ul>