

# 2019 ANNUAL REPORT & MEMBERSHIP MEETING

Jan – Dec 2019

Submitted Feb 8, 2020

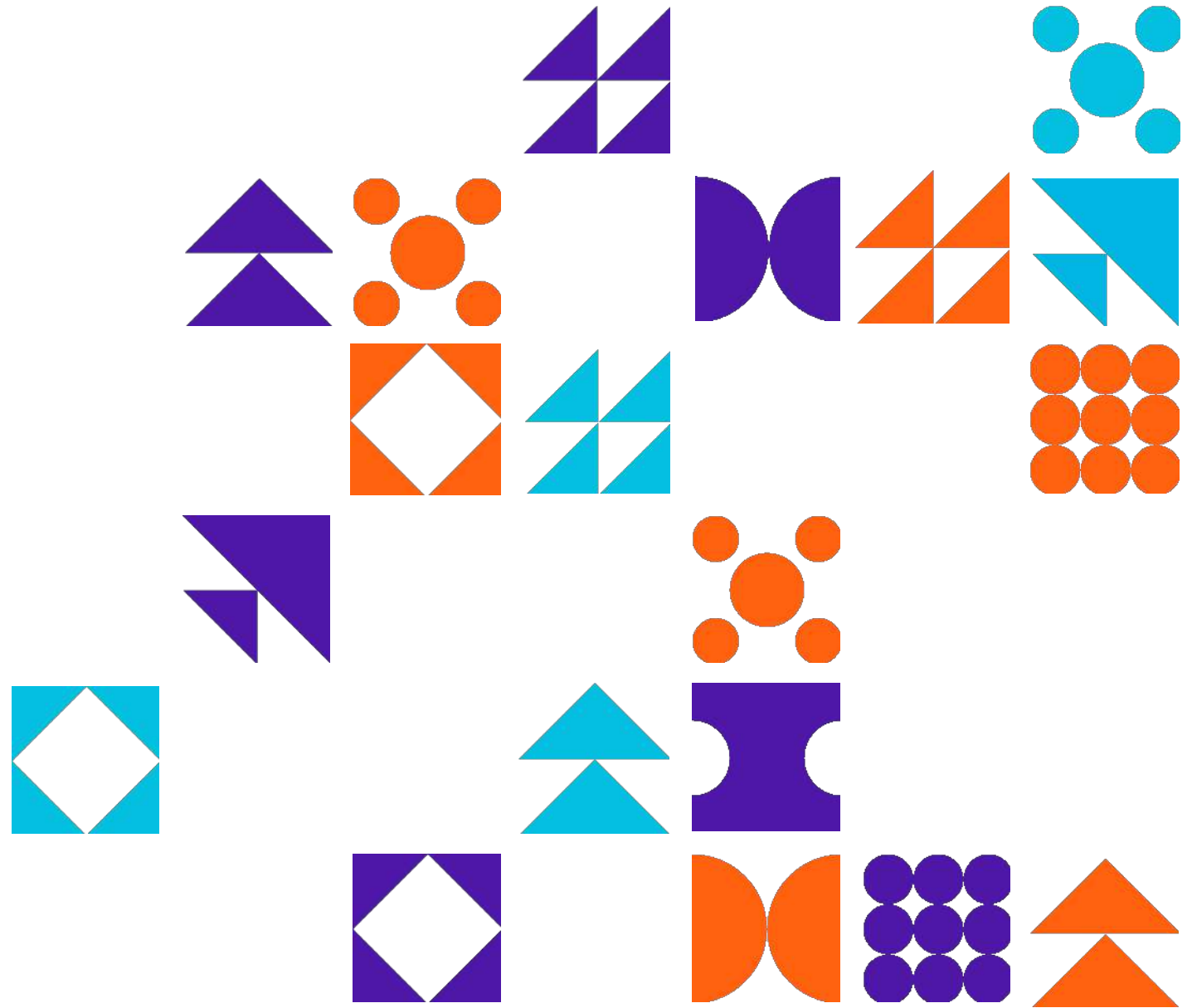
PMI Mass Bay Chapter  
FEB 8, 2020



# ANNUAL REPORT

Presented online Feb 8, 2020 by  
PMI Mass Bay Chapter

[Info@pmimassbay.org](mailto:Info@pmimassbay.org)



# Agenda

**ANNOUNCEMENTS**

**ABOUT PMI & THE CHAPTER**

**CHAPTER BOARD & COMMITTEES**

**CORE SERVICES**

**PROFESSIONAL DEVELOPMENT**

**COMMUNICATIONS**

**MEMBERSHIP & CREDENTIAL SURVEY**

**FINANCIALS**

**BUSINESS DEVELOPMENT**

**STRATEGY REVIEW & UPDATES**

# Announcements

## Elections

Nominating Committee is in process interviewing nominees for

- Executive Vice President
- VP Finance & Treasurer
- VP Professional Development
- VP Volunteers & Membership

Members should see official Ballots from PMI Global HQ by end of February. Voting is open for 30 days. Meet the candidates at events in February & March.

## Volunteers

Get involved & make a difference!

Open positions for Event Coordinator and Online Research.

# 100%

Mass Bay Chapter is a Volunteer led organization. Just 70 volunteers and board leaders bring you the education, events, and programming available throughout the year.

Get involved!  
Add your voice.

# Announcements

## **PMI Branding**

New Brand – New Logo.

Chapter Logo is too detailed for current brand standards. It needs a refresh or a re-do. The volunteer committees are working toward a suitable icon for Boston, Mass Bay, and Project Management.

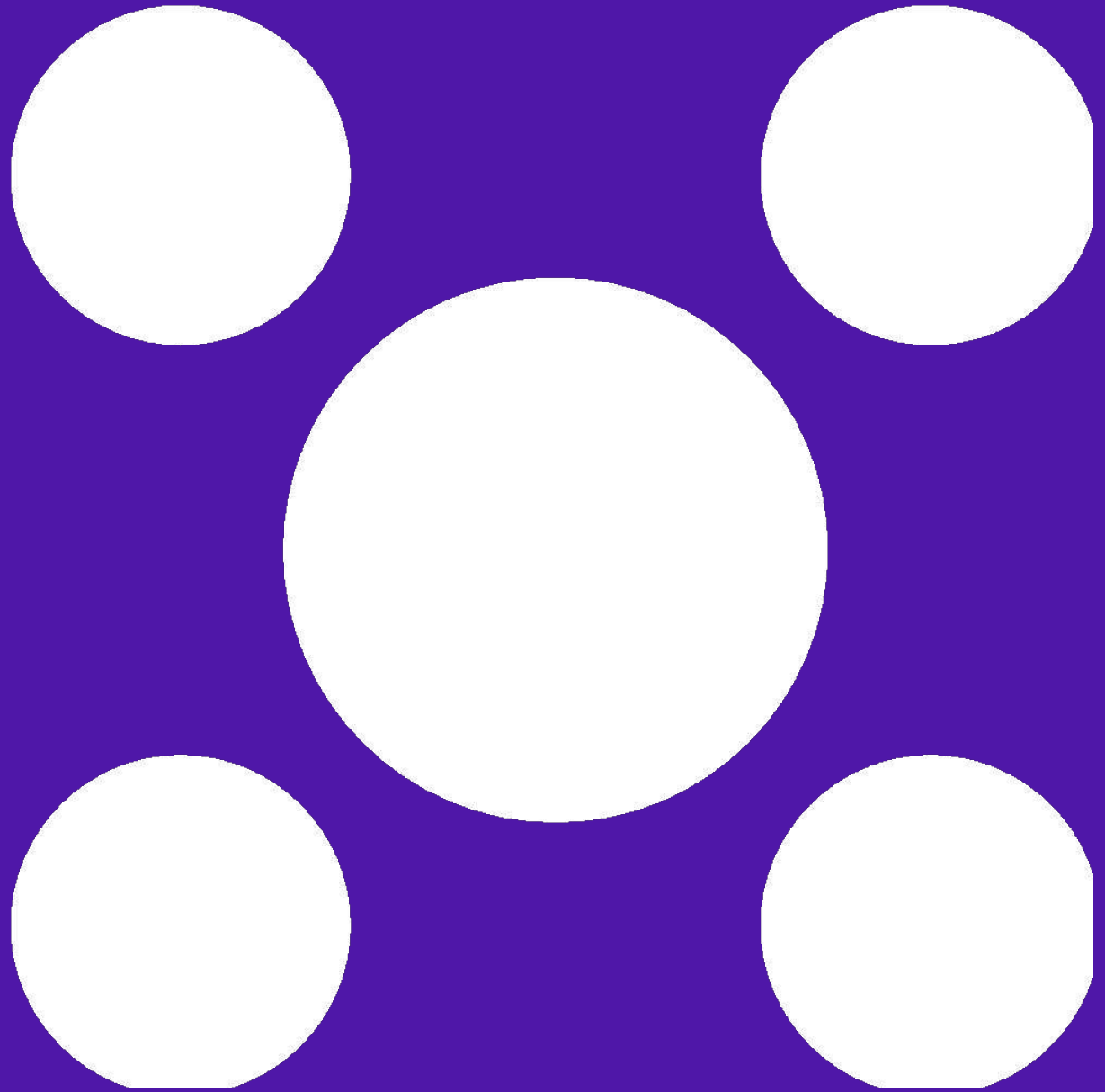
## **Flex & Disciplined Agile**

PMI has made several acquisitions in the past year to build on an increasingly agile world. Look for more MBC Agile focus and collaboration in the upcoming years.

# The FLEX

approach is an industry leading agile approach based on Lean-Thinking and patterns that improves an organization's ability to achieve business agility

# PMI GHQ & REGION 3



# About Project Management Institute

Project Management Institute (PMI) is the world's leading association for those who consider project, program or portfolio management their profession.

Founded in 1969, PMI delivers value for more than three million professionals working in nearly every country in the world through global advocacy, collaboration, education and research. We advance careers, improve organizational success and further mature the project management profession through globally-recognized standards, certifications, communities, resources, tools, academic research, publications, professional development courses and networking opportunities.

As part of the PMI family, ProjectManagement.com creates online global communities that deliver more resources, better tools, larger networks and broader perspectives.

# About PMI Mass Bay Chapter

In 2018 PMI Mass Bay Chapter celebrated its 40<sup>th</sup> year of incorporation. It was founded in 1978, by a team of Project Managers, in the government sector. It was the 8<sup>th</sup> chapter established!

Today it has grown to over 3,500 members. The all volunteer leadership & operations teams produce educational and networking events every month to educate and promote the profession.

We operate like a small start up focused on providing development & career advancement for Project Managers within the confines of Rt 495 ZIP codes.



# One of Many

Mass Bay Chapter is one of 125 world-wide chapters across 80 countries and is a component in Region 3 – a consortium of 18 chapters in the northeast of North America including Northeast Canada & all New England states. Chapters are open to PMI members and led by volunteers. Participate to enjoy events, meet new peers, network and share your knowledge and experience.

**2020**  
**LIM<sub>R3</sub>**

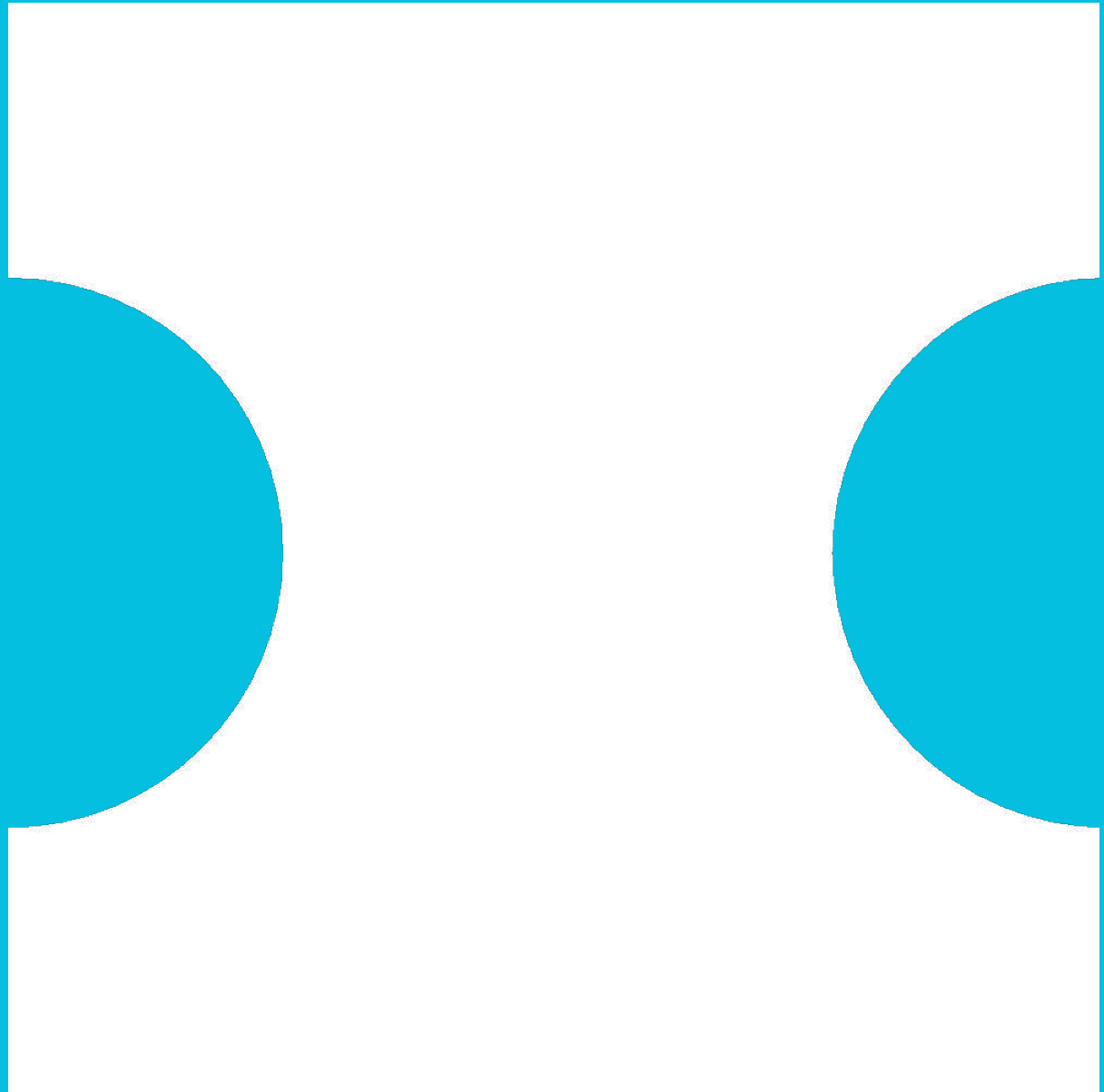
**will be held in  
Burlington VT**

# Regional Involvement

MBC attended the Region 3 Leadership Meeting in 2019 in Ottawa Canada. The event brings together over 100 leaders from PMI GHQ and regional chapters from the US & Canada to learn more about how to lead the chapter, keep up with PMI strategy and discover new opportunities for chapter membership.

MBC Leaders attended Leadership Institute Meeting in Philadelphia to learn better ways to serve our own community with sessions from experts on management, communications, and the PMI strategic direction.

# CHAPTER BOARD & COMMITTEES



# 2019 Board of Directors

President – Jennifer Robinson

Executive VP – Valdery Moura, Jr.

VP Finance & Treasurer – F. Phil Cartagena

VP Professional Development – Greg Paul

VP Business Development – Srinivasa Karri

VP Marketing – Michele Ainsworth

VP Technology – Chet Lang

VP Volunteers - Open Position

2019

The 2019 board was seated on July 1 2019.

Each year half of the board seats are up for election to fill a 2-year term.

# Roundtable Leaders

**Boston Metro:** Andrew Allen & Aleksandr Sorokin

**Boston Noontime:** Bob Louton & Amy Hand

**MetroWest:** Harish Kumar & Beena Bhatia

**PMO:** Deb Cote

**HealthCare:** Pam Breach, Tammy Chu & Caroline

Donahue-Oulette

## PMO

The certification round table was founded in 2019 to support the chapter needs to assist members in understanding the application process to sit for the PMP exam.

# Mentorship Program

Directors: Patty Delmonico & Bill Mackiewicz

19 mentee participants (2018 - 2019). The mentors were:

Lisa Acquiviva

Rakesh Banka

Sharon Botwinik

Gordon Chartier

Peter D'Olimpio

Steve Davenport

Patty Delmonico

Richard Hart

Kyujung Hwang

Bill Mackiewicz

Vidyaranya Manda

Gerry Mata

Peter Morris

Mike Nollet,

Heidi Spinella

Huikun (Marie) Tao

Gene Vasilevsky

Ron Welter

M.T. Yamany

10/1/19

Each year MBC supports a Mentoring program that starts in September.

# Special Events Teams

## Professional Development Conference

Michele Ainsworth, Phil Cartagena, Chet Lang, Greg Pau, Jennifer Robinson

## Career Clinic Leader

Eric Ramras

## 2019 Elections Committee

Gina Abudi & Rita Reed

2020

In 2020, look for Deep-Dive day long Workshops on MS Project, Agile, Design Thinking

# Technology Team

Leadership: Chet Lang and Jonathan Barbato

Digital Media: Johanna Katherine Forero Silva

Information Technology Services: Bob Joyal

Consultant: (Former VP) Will Wagner

New Members: Fabiano Sanches and Mark Henderson

2020

In 2020 look for a sleeker, simplified website with robust digital content including podcasts, webinars and video features.



# National Volunteer Week

Taking a moment here to acknowledge all the work and creativity the chapter member volunteers bring to our organization in the past year.

Thank you.

Please watch for your volunteer recognition letter in April - the week of 19-25, 2020, to coincide with National Volunteer Recognition Week.

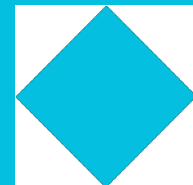
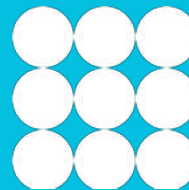
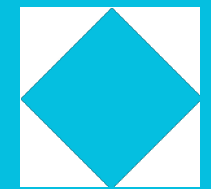
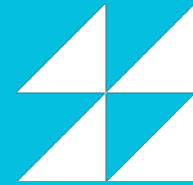
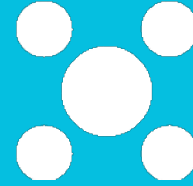
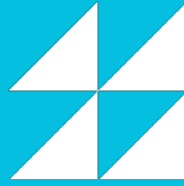
Each year MBC supports a Mentoring program

# CORE SERVICES

# Core Services

PMI GHQ describes the essential services a chapter must provide to its members. The existing Catalog of Core and Extended Services purpose was to support the strategic alignment and business planning of chapters by aligning services to PMI's Balanced Scorecard objectives and providing minimum target metrics for chapters to deliver.

# PROFESSIONAL DEVELOPMENT



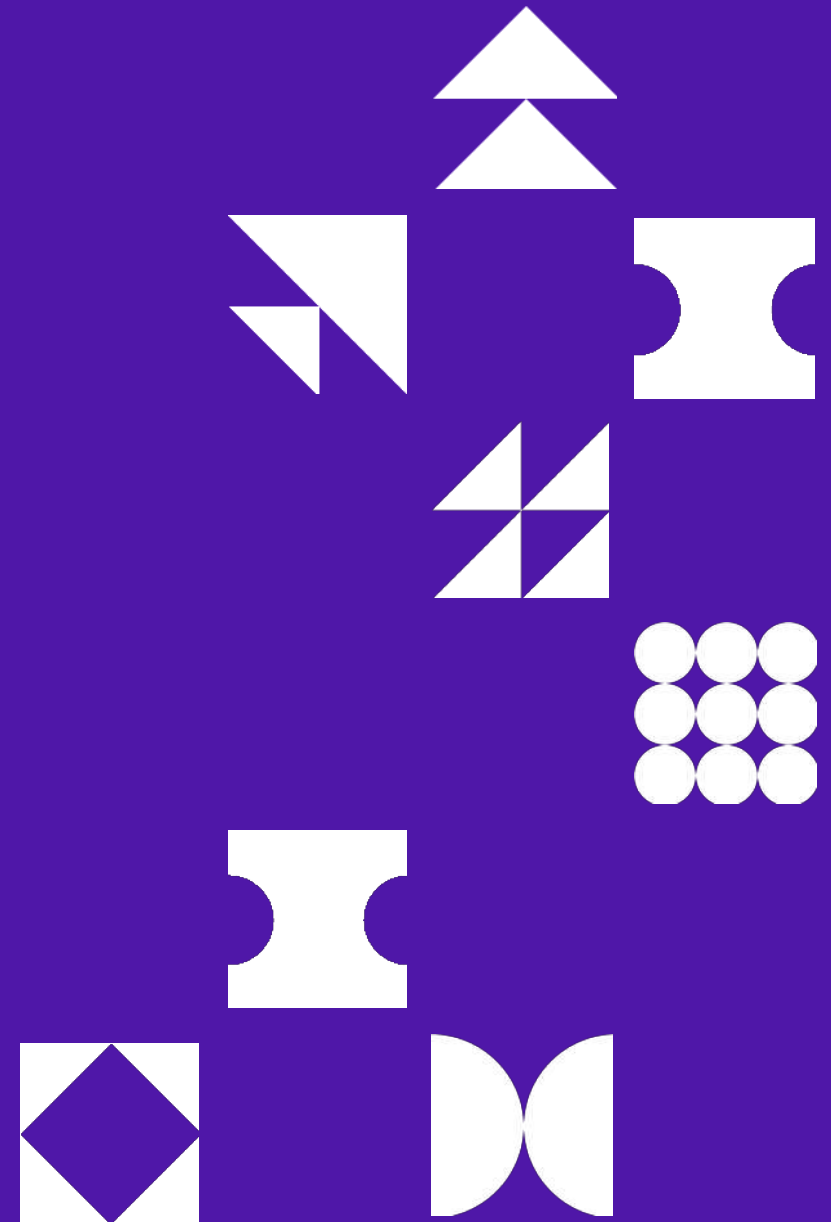
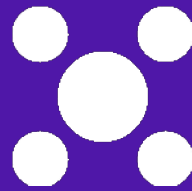
# Professional Development Core Services 2019

- Chapter Meetings: 7 meetings held thru the year
- Professional Development Conference: 1 held in September
- Networking Events: 2 socials. Red Sox Game in July and December Sip & Paint event.
- Chapter Roundtables: 49 held in Boston, North and West of town
- Host Multiple events in a month: Yes! 3-6 events each month except summer time.
- Joint meeting with neighbor chapter: none were held
- Work with other chapters to address regional initiatives
- Credential Prep Course - none offered
- Project Management Training - none offered

# Professional Development Goals for 2020

- Chapter Meetings: 9 meetings throughout PMI MBC service area
- Networking Events: Baseball game, scavenger hunt, holiday social
- Chapter Roundtables: 40 with a new Medical Devices group meeting in Mansfield
- Host Multiple events in a month: we're going to smash it with workshops, chapter meetings, and multiple roundtables
- Joint meeting with neighbor chapter: Potential for CMass, New Hampshire, and/or Rhode Island
- Work with other chapters to address regional initiatives: Will explore more direct participation with 2021 R3LIM
- Credential Prep Course - one planned for May / June for current exam & one end of year for the new one
- Project Management Training - 4 workshops planned around hard and soft topics within Project Management

# COMMUNICATIONS



# Communications Core Services

Communications with Members: general broadcast occurs weekly

Member Recognition:  
Website

Targeted Marketing  
Social Media

Focus Groups or Forums  
Enhanced Website  
Multi-language Website



# Communications Core Services Goals for 2020

Communications with Members  
Member Recognition  
Website

Targeted Marketing  
Social Media

Focus Groups or Forums  
Enhanced Website  
Multi-language Website

# MEMBER BENEFITS

# Member Benefit Core Services

Member Introduction & Benefits Package: yes, Monthly meetings

Volunteer Opportunities: yes, Email & on VRMS

Mentoring: Annual program

Networking Opportunities: Yes

Learning & Sharing Opportunities: could do better

Resume Posting & Employment Opportunities: Career Fair

Knowledge Delivery: NA

Ask the Expert: Yes

Affinity Programs: Yes

Extended Calendar

Knowledge Building Collaboration

Best Practices

Discussion topics

Content Information FAQs

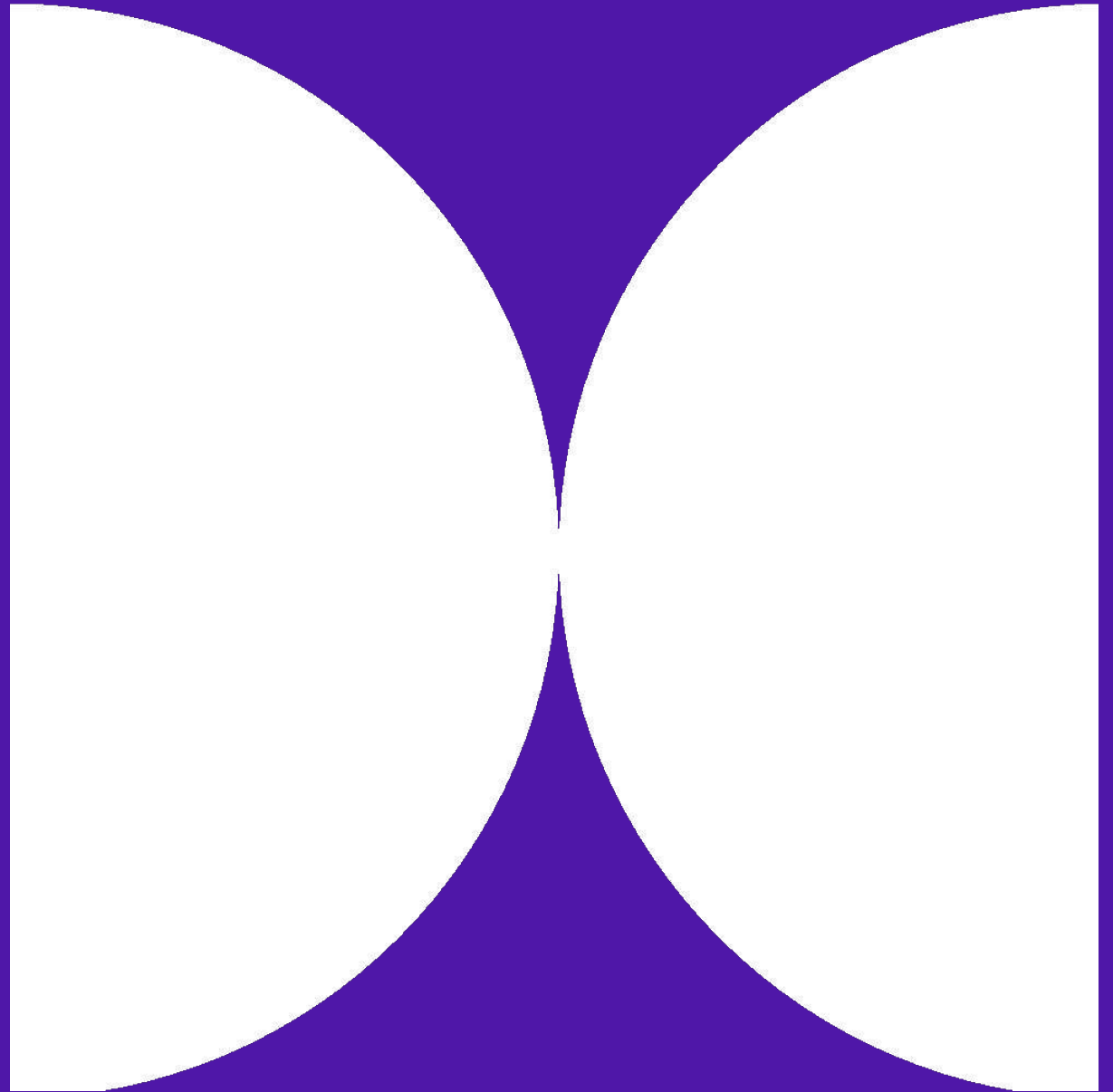
# Member Benefit Core Services Goals for 2020

Member Introduction & Benefits Package  
Volunteer Opportunities

Mentoring  
Networking Opportunities  
Learning & Sharing Opportunities  
Resume Posting & Employment Opportunities  
Knowledge Delivery

Ask the Expert  
Affinity Programs  
Extended Calendar  
Knowledge Building Collaboration  
Best Practices  
Discussion topics  
Content Information FAQs

# MEMBERSHIP & CREDENTIALS



# Membership Stats

Current Members: 3391

New members in 2019: 675

PMP Certification: 2250

Other PMI Certs: 170

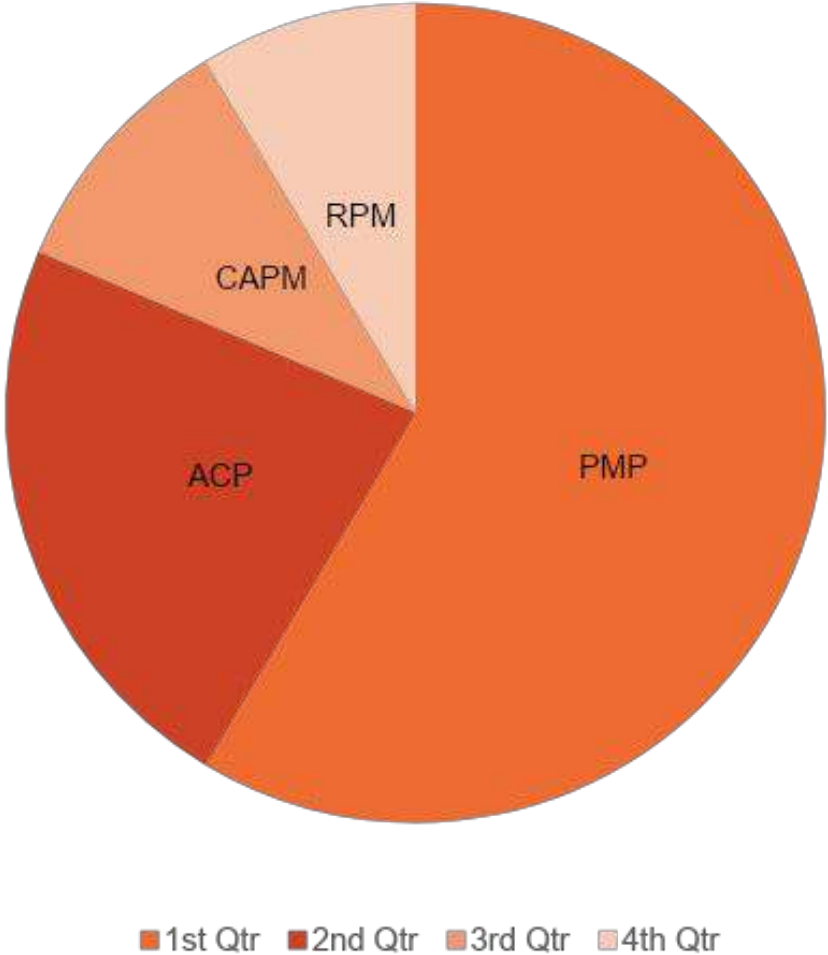
# Industry Stats

IT 651  
Other 447  
HealthCare 417  
Financial Services 329  
Pharma 287  
Consulting 278  
Manufacturing 123  
Government 109  
Training 99  
Energy 82  
Construction 75  
Aerospace 65  
Telecom 54  
Food/Bev 33

# Certification Stats

PMP 2250  
ACP 75  
CAPM 57  
RMP 14  
PgMP 13  
SP 5  
PBA 4  
PfMP 2

## SALES





# Location numbers

**3278** dues paying members with **2957** within Rt 495

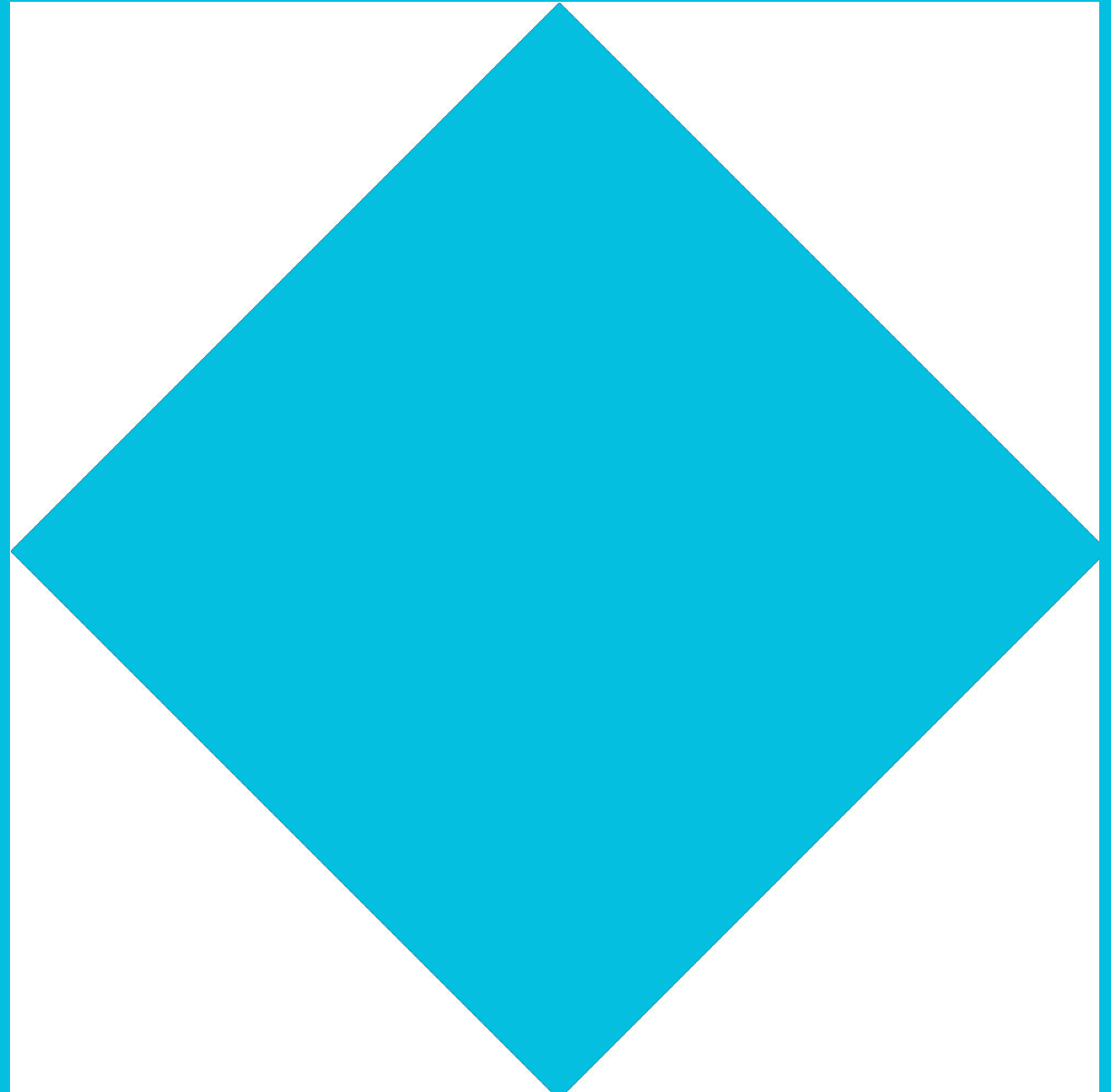
Boston	<b>368</b>	Outside MA	<b>185</b>
Cape Cod	<b>40</b>	South Coast	<b>24</b>

	North	West	South
Total exclude above	<b>979</b>	<b>1096</b>	<b>560</b>
Outside 128	<b>446</b>	<b>680</b>	<b>422</b>
Inside 128	<b>553</b>	<b>416</b>	<b>138</b>

North was considered as east of Rt 3. West between Rt 3 and Rt 1 south of Boston. South was east of Rt 1. South Coast - south of 495.



# FINANCIALS & BUSINESS DEVELOPMENT



# 2019 In Review

Income	\$149,128.61
<b>GROSS PROFIT</b>	<b>\$149,128.61</b>
Expenses	
AV Charges	150.00
Catering	44,722.63
Contract Labor	15,964.80
Gifts	900.00
Meeting Expense	880.98
Merchant Account Fees	15.00
Miscellaneous	901.13
Other Marketing Expense	1,300.53
Other Miscellaneous Service Cost	-0.82
Outsourced Admin Services	21,028.18
Outsourced Admin Supplies	2,172.12
PMI Region 3 Dues/Expenses	3,823.00
Postage and Shipping	442.36
ProfDev Expenses	5,921.12
Speaker Fees	9,309.90
Speaker Travel Expenses	645.48
State Filing Expense	18.50
Subscription Services	888.60
Supplies	<b>885.11</b>
Taxes	850.00
Telco/Technology	<b>5,972.91</b>
Travel	<b>11,301.13</b>
Unapplied Cash Bill Payment Expense	-564.25
Volunteer Expenses	2,887.02
<b>Total Expenses</b>	<b>\$130,415.43</b>
<b>NET OPERATING INCOME</b>	<b>\$18,713.18</b>
<b>NET INCOME</b>	<b>\$18,713.18</b>



# Business Development 2019 Current Sponsors

Level	Sponsor Name	Contract End	Status
Gold	Eliassen Group	4/2020	Paid
Gold	Palisade	6/2020	Paid
Gold	Boston University	6/2020	Paid
Gold	Hawkins Point Partners	8/2020	Paid
Gold	IIL	NA	Paid
Silver	Boston College	6/2020	Paid
Silver	Northeastern University	8/2020	Paid

# Business Development & Outreach Goals

Target for 2020 is \$9000 since we don't plan to offer PDC for 2020



# Corporate Partnership

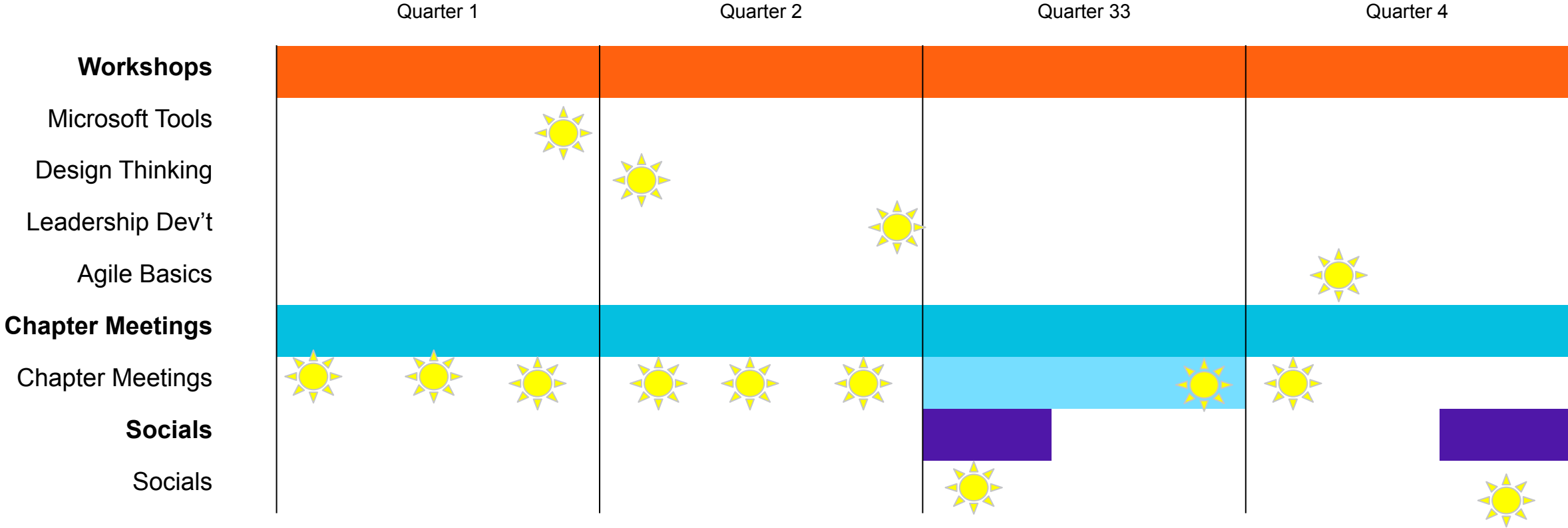
Thank you to Athena Health and Constant Contact for the use of their space for chapter meetings in 2019



# STRATEGY REVIEW



# 2020 Event Plans



■ Workshops1   
 ■ Chapter Mtngs   
 ■ Socials4

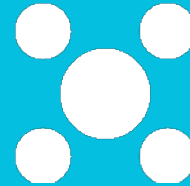
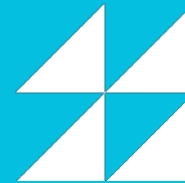
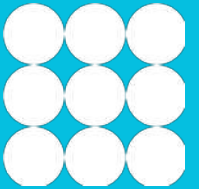
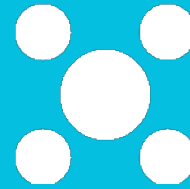
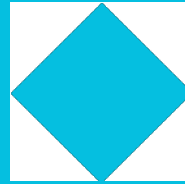




**Project  
Management  
Institute.**



THANK YOU



JENNIFER ROBINSON  
PRESIDENT, MASS BAY CHAPTER  
[president@pmimassbay.org](mailto:president@pmimassbay.org)

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**NAME LEVEL 2**

**TITLE OR COMPANY LEVEL 3**



Level 1

**level 2**

Level 3

LEVEL 5 NAME

Level 1

**level 2**

Level 3

LEVEL 5 NAME

Level 1

**level 2**

Level 3

LEVEL 5 NAME



**UNITED STATES**  
Washington, D.C.

**PENNSYLVANIA**  
Newtown Square

**BRAZIL**  
Rio de Janeiro

**ARGENTINA**  
Buenos Aires

**BELGIUM**  
Brussels

**BULGARIA**  
Sofia

**UAE**  
Dubai

**INDIA**  
New Delhi

**REPUBLIC OF SINGAPORE**  
Singapore

# Operations Chairs 2019

AVP Events – Diana Andler

AVP Speakers – Al Grusby

Marketing – Annette Holland

AVP Technology – Jonathan Barbato

AVP Sponsorship – Vidyaranya Manda

Bookkeeper – Deepti Garg

## AVPs

Leaders in the chapter operational teams commit for at least a year, but may serve longer. They offer advice to the Board from their respective teams.