2019 ANNUAL REPORT & MEMBERSHIP MEETING
Jan – Dec 2019
Submitted Feb 8, 2020

PMI Mass Bay Chapter
FEB 8, 2020
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.
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.
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.
About PMI Mass Bay Chapter

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

Today it as 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.
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.
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
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.

**2019 Board of Directors**

President – Jennifer Robinson
Executive VP – Valderly 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
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

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:

<table>
<thead>
<tr>
<th>Mentee Name</th>
<th>Mentor Name</th>
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</thead>
<tbody>
<tr>
<td>Lisa Acquiviva</td>
<td>Rakesh Banka</td>
</tr>
<tr>
<td>Gordon Chartier</td>
<td>Peter D'Olimpio</td>
</tr>
<tr>
<td>Patty Delmonaco</td>
<td>Richard Hart</td>
</tr>
<tr>
<td>Bill Mackiewicz</td>
<td>Vidyaranya Manda</td>
</tr>
<tr>
<td>Peter Morris</td>
<td>Mike Nollet,</td>
</tr>
<tr>
<td>Huikun (Marie) Tao</td>
<td>Gene Vasilevsky</td>
</tr>
<tr>
<td>M.T. Yamany</td>
<td>Sharon Botwinik</td>
</tr>
<tr>
<td></td>
<td>Steve Davenport</td>
</tr>
<tr>
<td></td>
<td>Kyujung Hwang</td>
</tr>
<tr>
<td></td>
<td>Gerry Mata</td>
</tr>
<tr>
<td></td>
<td>Heidi Spinella</td>
</tr>
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<td></td>
<td>Ron Welter</td>
</tr>
</tbody>
</table>
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

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
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.
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 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 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
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.

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
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!

Location numbers

3278 dues paying members with 2957 within Rt 495

<table>
<thead>
<tr>
<th>Boston</th>
<th>Outside MA</th>
<th>South Coast</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>368</td>
<td>185</td>
</tr>
<tr>
<td>Cape Cod</td>
<td>40</td>
<td>24</td>
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</table>

<table>
<thead>
<tr>
<th>North</th>
<th>West</th>
<th>South</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total exclude above</td>
<td>979</td>
<td>1096</td>
</tr>
<tr>
<td>Outside 128</td>
<td>446</td>
<td>680</td>
</tr>
<tr>
<td>Inside 128</td>
<td>553</td>
<td>416</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Income</th>
<th>$140,128.01</th>
</tr>
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<tbody>
<tr>
<td>Gross Profit</td>
<td>$140,128.01</td>
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## Expenses

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>AV Charges</td>
<td>150.00</td>
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<tr>
<td>Catering</td>
<td>44,722.63</td>
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<tr>
<td>Contract Labor</td>
<td>15,944.80</td>
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<tr>
<td>Gifts</td>
<td>900.00</td>
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<tr>
<td>Meeting Expense</td>
<td>880.08</td>
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<tr>
<td>Merchant Account Fees</td>
<td>15.00</td>
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<tr>
<td>Miscellaneous</td>
<td>901.13</td>
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<tr>
<td>Other Marketing Expense</td>
<td>1,200.53</td>
</tr>
<tr>
<td>Other Miscellaneous Service Cost</td>
<td>-0.82</td>
</tr>
<tr>
<td>Outsourced Admin Services</td>
<td>21,028.18</td>
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<tr>
<td>Outsourced Admin Supplies</td>
<td>2,172.12</td>
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<tr>
<td>PMI Region 5 Dues/Expenses</td>
<td>3,823.00</td>
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<td>Postage and Shipping</td>
<td>442.36</td>
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<tr>
<td>Professional Expenses</td>
<td>5,921.12</td>
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<tr>
<td>Speaker Fees</td>
<td>5,309.90</td>
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<td>Speaker Travel Expenses</td>
<td>648.48</td>
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<td>Tax Preparation Expense</td>
<td>18.50</td>
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<td>Subscription Services</td>
<td>888.60</td>
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<tr>
<td>Supplies</td>
<td>885.11</td>
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<tr>
<td>Taxes</td>
<td>650.00</td>
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<tr>
<td>Telco/Technology</td>
<td>5,972.91</td>
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<td>Travel</td>
<td>11,301.13</td>
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<tr>
<td>Unapplied Cash Bill Payment Expense</td>
<td>-564.25</td>
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<tr>
<td>Volunteer Expenses</td>
<td>2,887.02</td>
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</tbody>
</table>

**Total Expenses** | **$130,415.43**
**Net Operating Income** | **$16,713.18**
**Net Income** | **$16,713.18**

2019 Annual Report Mass Bay Chapter
## Business Development 2019 Current Sponsors

<table>
<thead>
<tr>
<th>Level</th>
<th>Sponsor Name</th>
<th>Contract End</th>
<th>Status</th>
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<tbody>
<tr>
<td>Gold</td>
<td>Eliassen Group</td>
<td>4/2020</td>
<td>Paid</td>
</tr>
<tr>
<td>Gold</td>
<td>Palisade</td>
<td>6/2020</td>
<td>Paid</td>
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<tr>
<td>Gold</td>
<td>Boston University</td>
<td>6/2020</td>
<td>Paid</td>
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<tr>
<td>Gold</td>
<td>Hawkins Point Partners</td>
<td>8/2020</td>
<td>Paid</td>
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<tr>
<td>Gold</td>
<td>IIL</td>
<td>NA</td>
<td>Paid</td>
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<tr>
<td>Silver</td>
<td>Boston College</td>
<td>6/2020</td>
<td>Paid</td>
</tr>
<tr>
<td>Silver</td>
<td>Northeastern University</td>
<td>8/2020</td>
<td>Paid</td>
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</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Workshops</th>
<th>Quarter 1</th>
<th>Quarter 2</th>
<th>Quarter 3</th>
<th>Quarter 4</th>
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<tbody>
<tr>
<td>Microsoft Tools</td>
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<td>Design Thinking</td>
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<td>Leadership Dev't</td>
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<td>Agile Basics</td>
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<td>Chapter Meetings</td>
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<tr>
<td>Socials</td>
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</tbody>
</table>

- **Workshops**: Microsoft Tools, Design Thinking, Leadership Dev't, Agile Basics
- **Chapter Meetings**: Chapter Meetings
- **Socials**: Socials
THANK YOU

JENNIFER ROBINSON
PRESIDENT, MASS BAY CHAPTER
president@pmimassbay.org
“Quote page image. Culpa qui officia deserunt mollit anim id est laborum. Level 1. Arial 32.”
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.

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