

16 January 2025

2025 Annual Business Meeting

Empowering the Future: From Celebration to
Acceleration



Discussion Topics

Our learning journey

Time	Duration	Topic	Facilitator
6:30 pm – 6:35 pm	5 min.	Welcome and Opening Remarks	Deby Covey, David Doan
6:35 pm – 6:45 pm	15 min.	2024 Chapter Highlights	Deby Covey
6:45 pm – 7:00 pm	15 min.	2024 Finance Summary	Meeta Autrey
7:00 pm – 7:30 pm	30 min.	2024 Chapter Accomplishments	2024 Board of Directors
7:30 pm – 7:35 pm	5 min.	Prioritization of 2025 Initiatives	David Doan
7:35 pm – 8:00 pm	25 min.	2025 Chapter Goals and Initiatives	2025 Board of Directors
8:00 pm – 8:15 pm	15 min.	Breakout Sessions (tentative)	All
8:15 pm – 8:20 pm	5 min.	PMI Los Angeles Wildfires Relief and Recovery	David Doan, Social Impact
8:20 pm – 8:30 pm	10 min.	Q&A and Closing	All

6:30 pm – 6:35 pm

Welcome and Opening Remarks

Facilitators: Deby Covey, David Doan





Passing the Torch

**Deby Covey,
2023- 2024
President**

**David Doan,
2025
President**



6:35 pm – 6:45 pm

2024 Chapter Highlights

Facilitator: Deby Covey



50th Anniversary Sizzle

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2024 – A Year to Remember

Chapter Highlights

JANUARY

CHAPTER 500 CLUB

Chapter is recognized for utilizing Chapter Guest pass to provide members an opportunity to test out the chapter

JUNE

50TH ANNIVERSARY CELEBRATION

Chapter turns **50** and celebrates at Universal Studios Hollywood where we first held PM training back in **1997**

SEPTEMBER

NORTH AMERICA GLOBAL SUMMIT AND LEADERSHIP INSTITUTE MEETING (LIM)

Chapter helps PMI host the largest LIM globally here in Los Angeles and brought in more members to this event than any other chapter

APRIL

PMWB INITIATIVE

Chapter is selected to launch PMI's Project Management Without Borders (PMWB) initiative along with PMI-Poland

AUGUST

NORTH AMERICA REGION CHAPTER OF THE YEAR

Chapter is recognized as the #1 large chapter (over 1,500 members) in North America and a semi-finalist for Global Chapter of the Year

SEPTEMBER

PMI GLOBAL CHAPTER OF THE YEAR

Chapter is recognized as PMI's Global Chapter of the Year with **29%** membership growth; **80%** retention; and Social Impact Initiatives



Our Valuable and Awesome Volunteers

Celebrating those who contributed and made a difference to the PMI-LA community

89

Number of active volunteers

6,442

Number of total hours logged across all volunteers

72

Average number of hours per volunteer

29

Number of volunteers (non-Board members) who participated in the Midyear Strategic Planning Meeting



PMI-LA Awards

2024 Volunteer Awards

The Los Angeles Chapter of the Project Management Institute (PMI-LA) has established these award to:

- Honor teams and individuals for project or process achievements and deliverables
- Honor individuals for their achievements, accomplishments and overall performance throughout the year that have made a significant positive impact on the chapter.
- There are 3 types of the awards:
 - Special Recognition Award – Team
 - Special Recognition Award – Individual
 - Charlie Lopinsky Award

This year we have 3 individual awards, 1 team award, and 1 Charlie Lopinsky award.

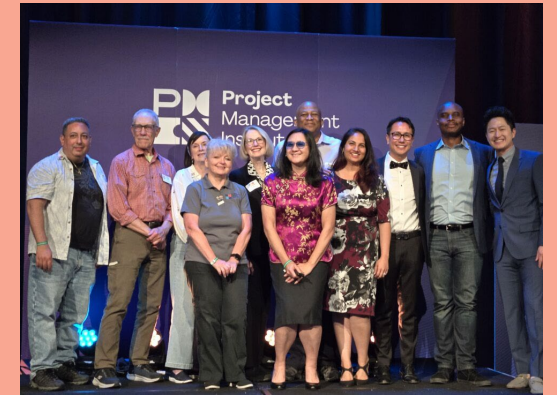
Chapter End of Year Volunteer Appreciation Event

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PMI-LA Awards

Special Recognition Team Award

- Meeta Autrey
- Amelia Mochny
- Britt Scholnick
- David Doan
- Deby Covey
- Edmund Martinez
- Ida Harding
- James Jackson
- Mariana Michelino
- Michelle Covey
- Patti Myhre
- Pierre Vernet
- Rose Otowo
- Sean Kennedy
- Simon Twu
- Steve Marlin
- Svetlana Averbukh
- Vick Madenian



50th
Anniversary
Task Force

PMI-LA Awards

Special Recognition Individual Awards

1

Special Recognition Individual Award

Tracy Bader



2

Special Recognition Individual Award

Angelo Salazar



3

Special Recognition Individual Award

Barbara Cooke



PMI-LA Awards

2024 Charlie Lopinsky Volunteer of the Year

Faye Wu has consistently demonstrated exceptional dedication and made significant contributions to PMI-LA since joining in August 2022. Her commitment to excellence and willingness to go above and beyond make her an ideal candidate for the award.

Faye's impact is evident in her multifaceted involvement:

- Dual Volunteer Roles: Faye actively contributes to both the Marketing and Operations teams, demonstrating her versatility and commitment to PMI-LA's success.
- Exemplary Deliverables: Faye consistently delivers high-quality work, exceeding expectations in terms of detail and timeliness.
- Strategic and Analytical Mindset: Faye possesses a strong analytical approach, consistently seeking ways to optimize and sustain programs like the Leadership Development Program.
- Leadership and Collaboration: Faye's "can-do" attitude and collaborative spirit inspire those around her.
- Alignment with PMI-LA's Mission: Faye consistently ensures her work aligns with PMI-LA's mission, goals, and priorities.
- Active Engagement: Beyond her core volunteer roles, Faye actively participates in PMI-LA events, including the 50th Anniversary Celebration, and even volunteered for the PMI 2024 Global Summit, demonstrating her commitment to the broader PMI community.



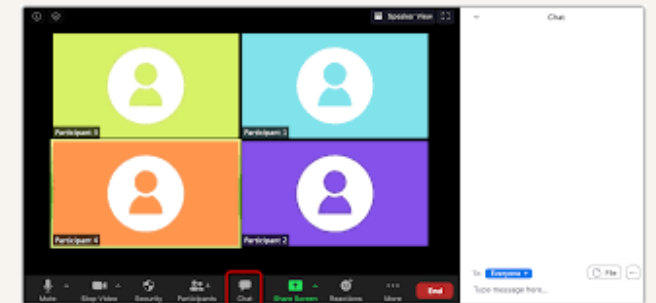
FAYE

WU

Member Feedback

Now, it's time for you to provide your feedback on our 2024 highlights

- We highly value your candid constructive feedback and will discuss changes that can be made in our strategic initiatives.
- Share your comments and feedback on how PMI-LA did in 2024. What did you like or dislike?
 - Use the Zoom Chat feature and enter your comments
- Please share ideas on how we can serve you better. What would you like to see different?



6:45 pm – 7:00 pm

2024 Finance Summary

Facilitator: Meeta Autrey



2024 Finance Summary

Total Chapter Revenue and Expenses

	2023 Actuals	2024 Budget	2024 Actuals	Variance
Total Chapter Revenue	99,143	134,082	91,039	43,043
Total Chapter Expenses	75,434	130,473	92,005	38,468
Chapter Operating Net	23,709	3,609	-966	

Current Assets as of December 31, 2024

Checking Account	\$94,068
Savings Account – Money Market	\$149,753
Savings Account – CD	\$157,503
Investment – CDs	\$70,157
PayPal	\$19,260
Total	\$490,741

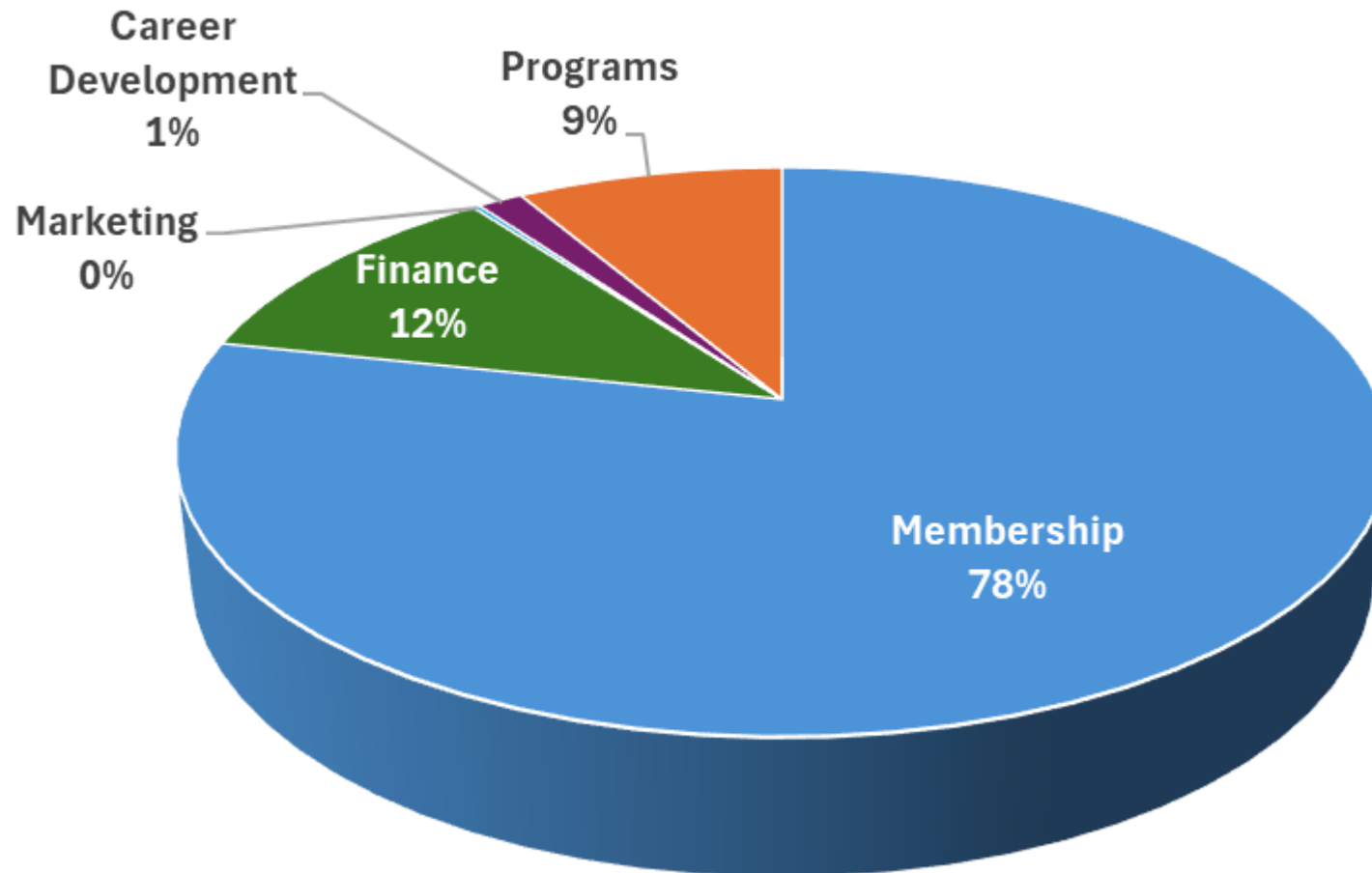
Items of Note:

- 2025 Expenses Prepaid (Storage, VRM, PMP Prep)
- 2024 Budget was planned with understanding that non-operational expenses would impact reserves.
 - **Non-Operating Revenue = 38,440**
 - **Non-Operating Expenses = 79,138**
- Chapter Net Loss = **41,663**
- All information pending final review by CPA during tax



2024 Finance Summary

2024 Revenue Streams



Membership Revenue

- Chapter Dues are \$30 per Member Annually
- Revenue: ~ \$71.3K

Programs

- Events Revenue: ~ \$7.7K

Career Development

- Events Revenue: ~ \$1.3K

Marketing

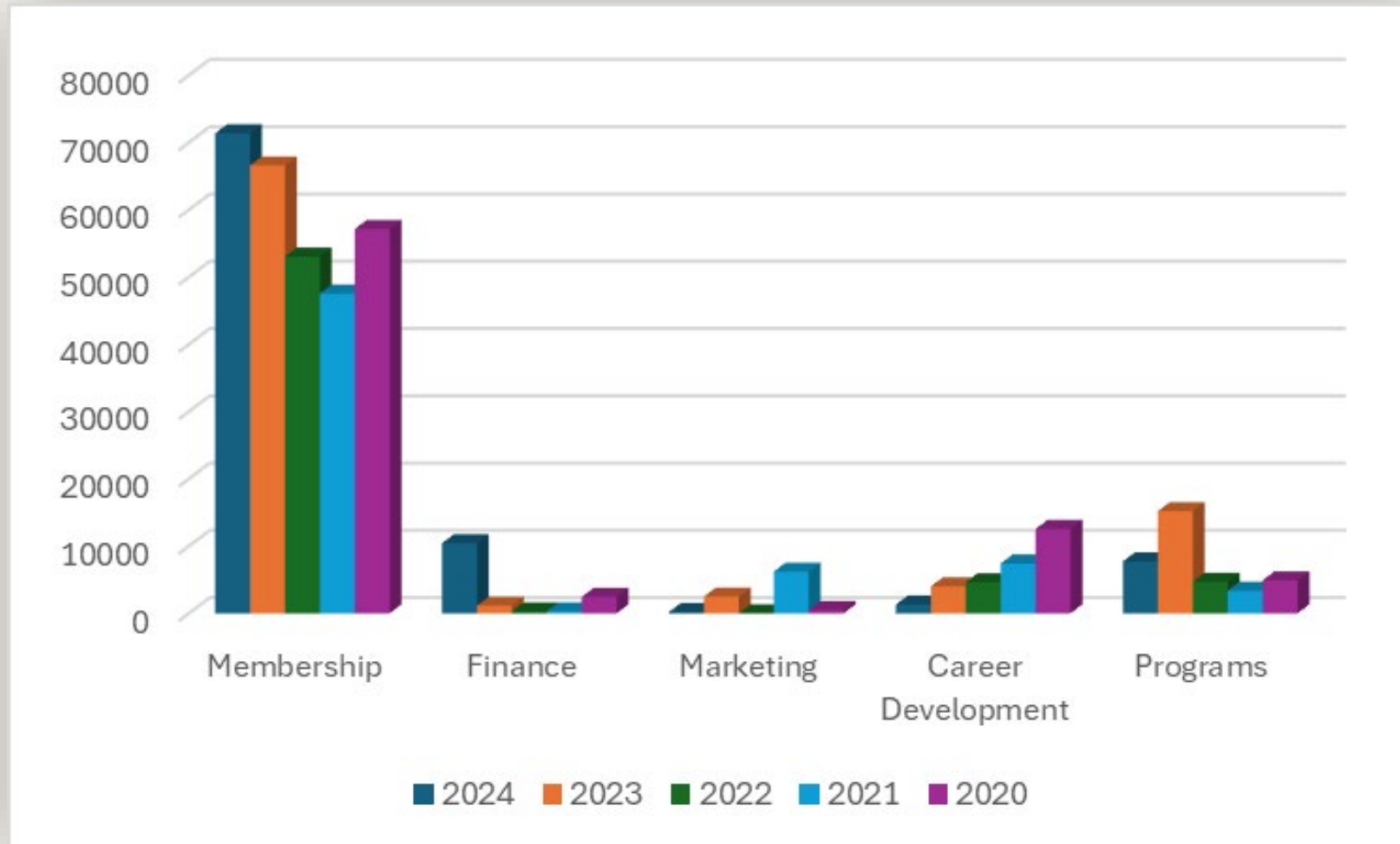
- Sponsorships: \$200

Finance

- Interest Earnings and Credit Card Rewards: ~\$10.4K

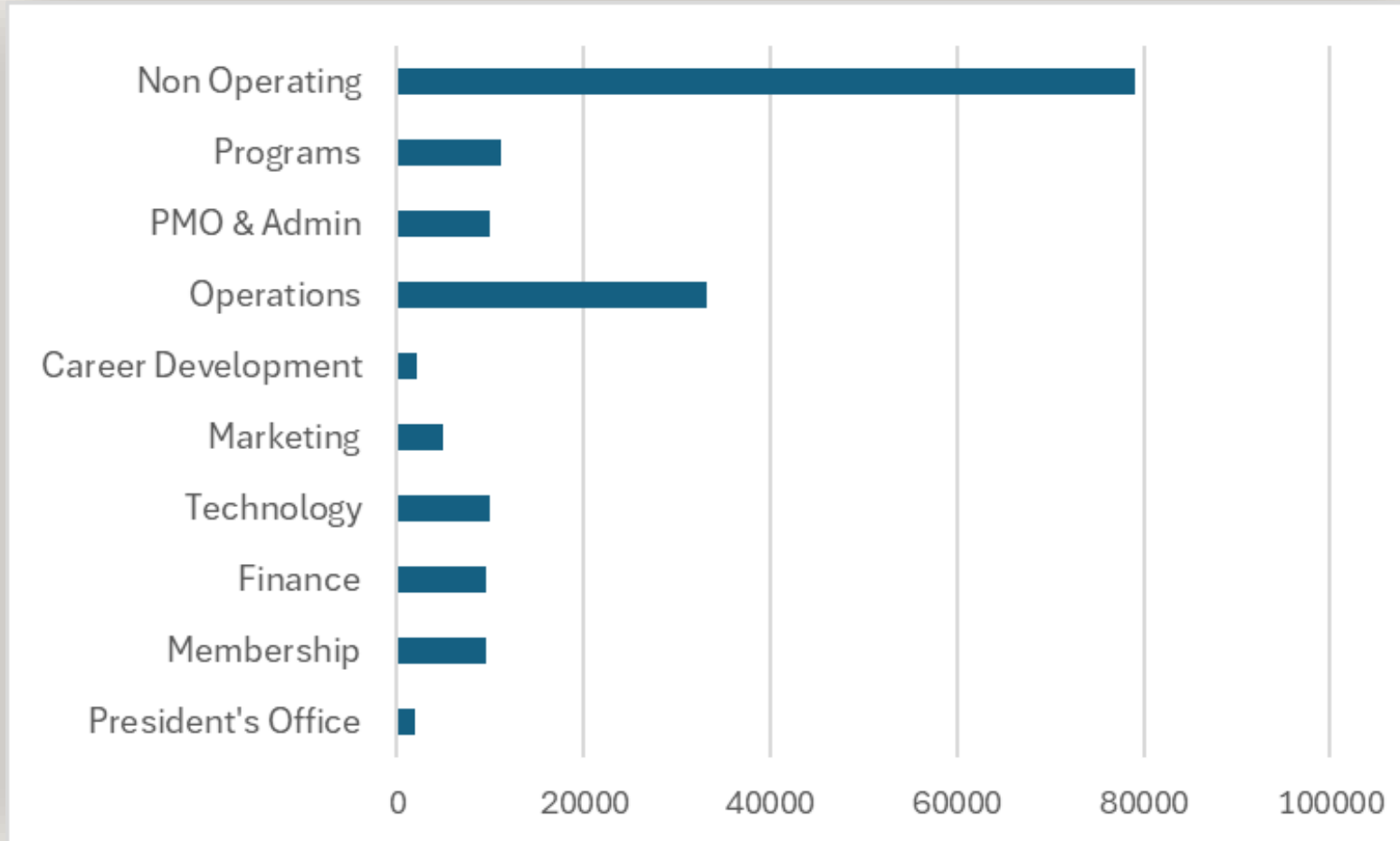
2024 Finance Summary

5-Year Revenue Trend by Portfolio



2024 Finance Summary

2024 Expense Distribution

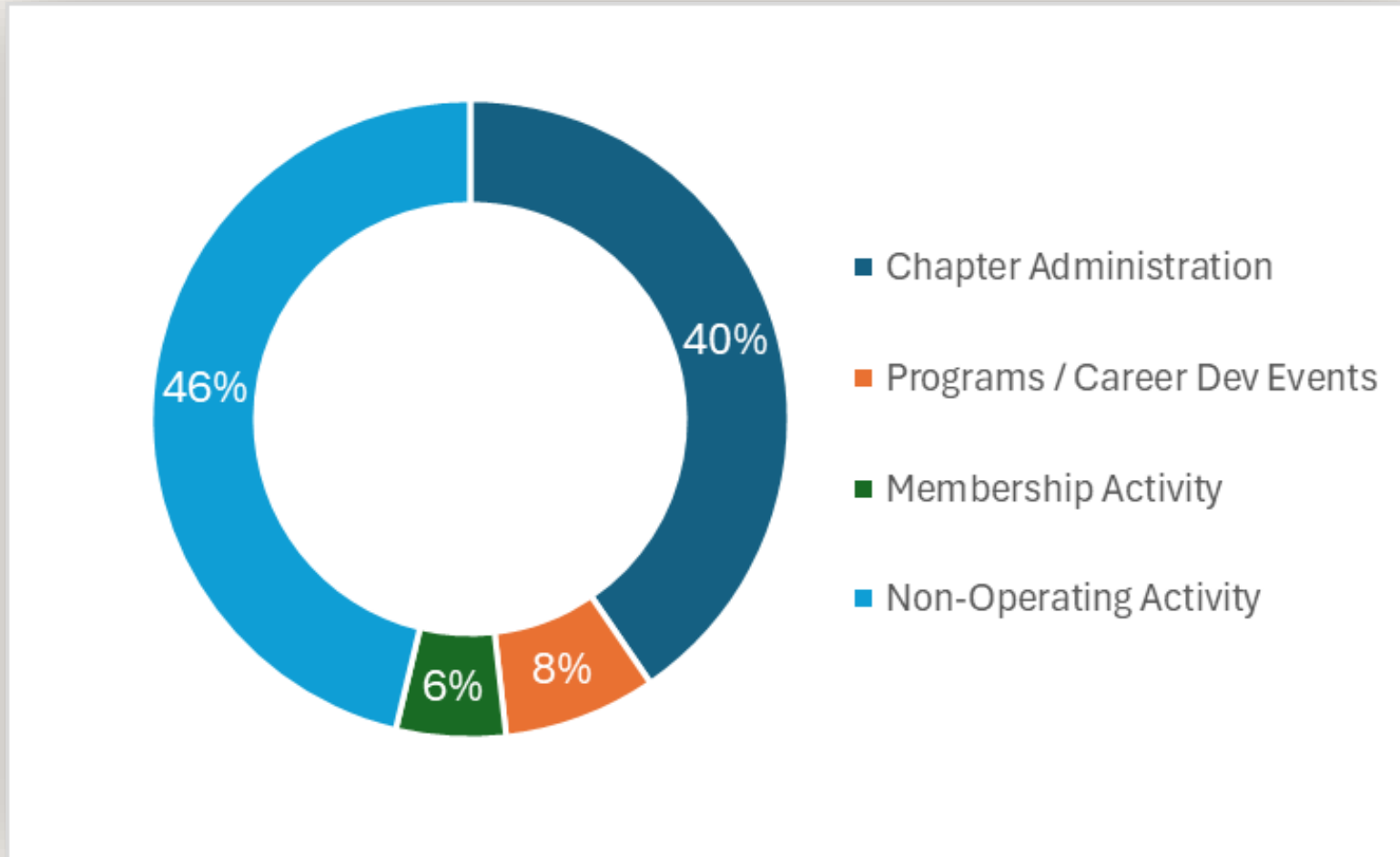


Items of Note:

- Non-Operating Expenses include any costs associated with special non-operational / non-recurring activities. 2024 saw a few initiatives here:
 - 50th Anniversary Celebration and Special Merchandise
 - Piloted PMI's PMWB initiative.
 - PMI Global / LIM was hosted in Los Angeles

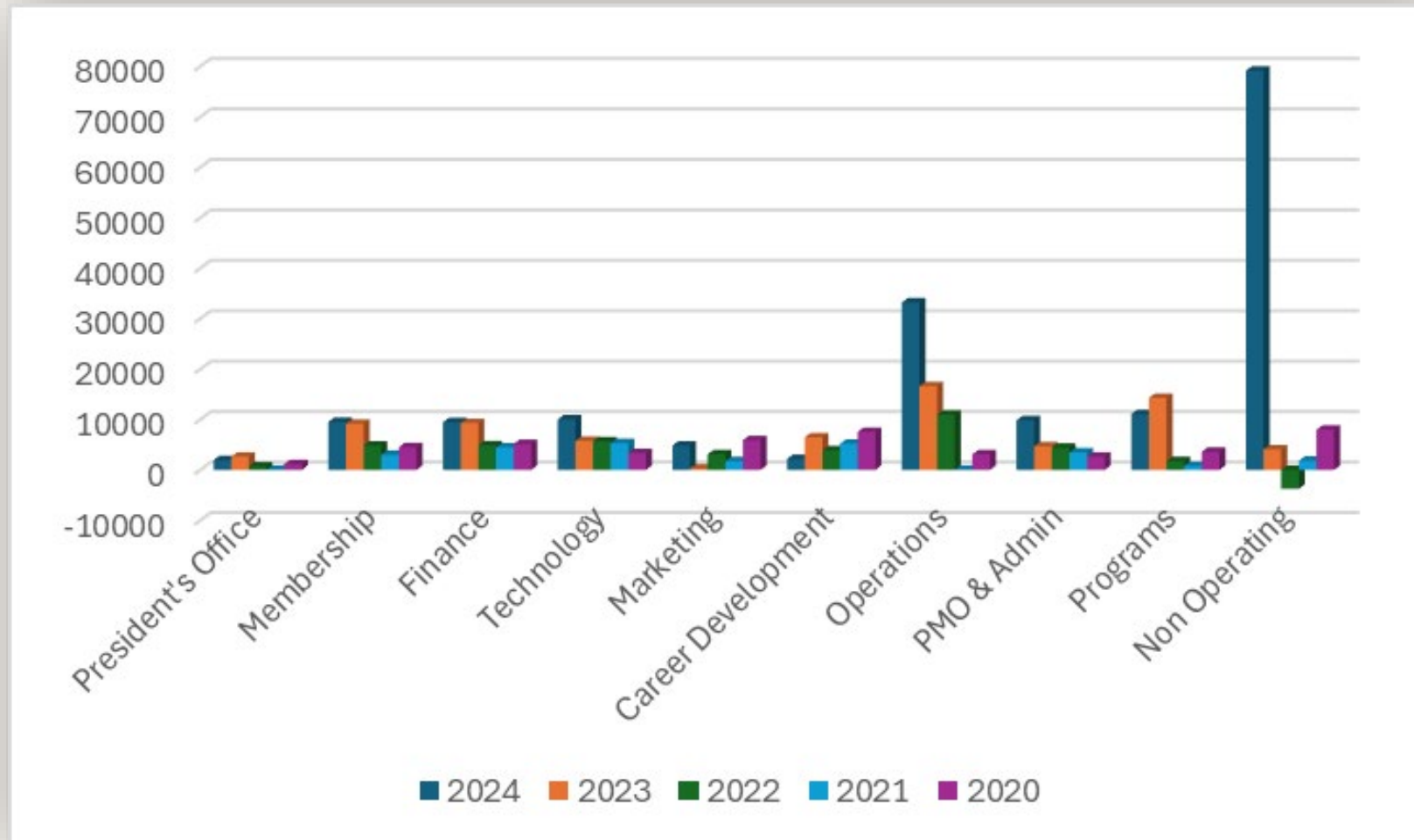
2024 Finance Summary

Where Your Dues Go



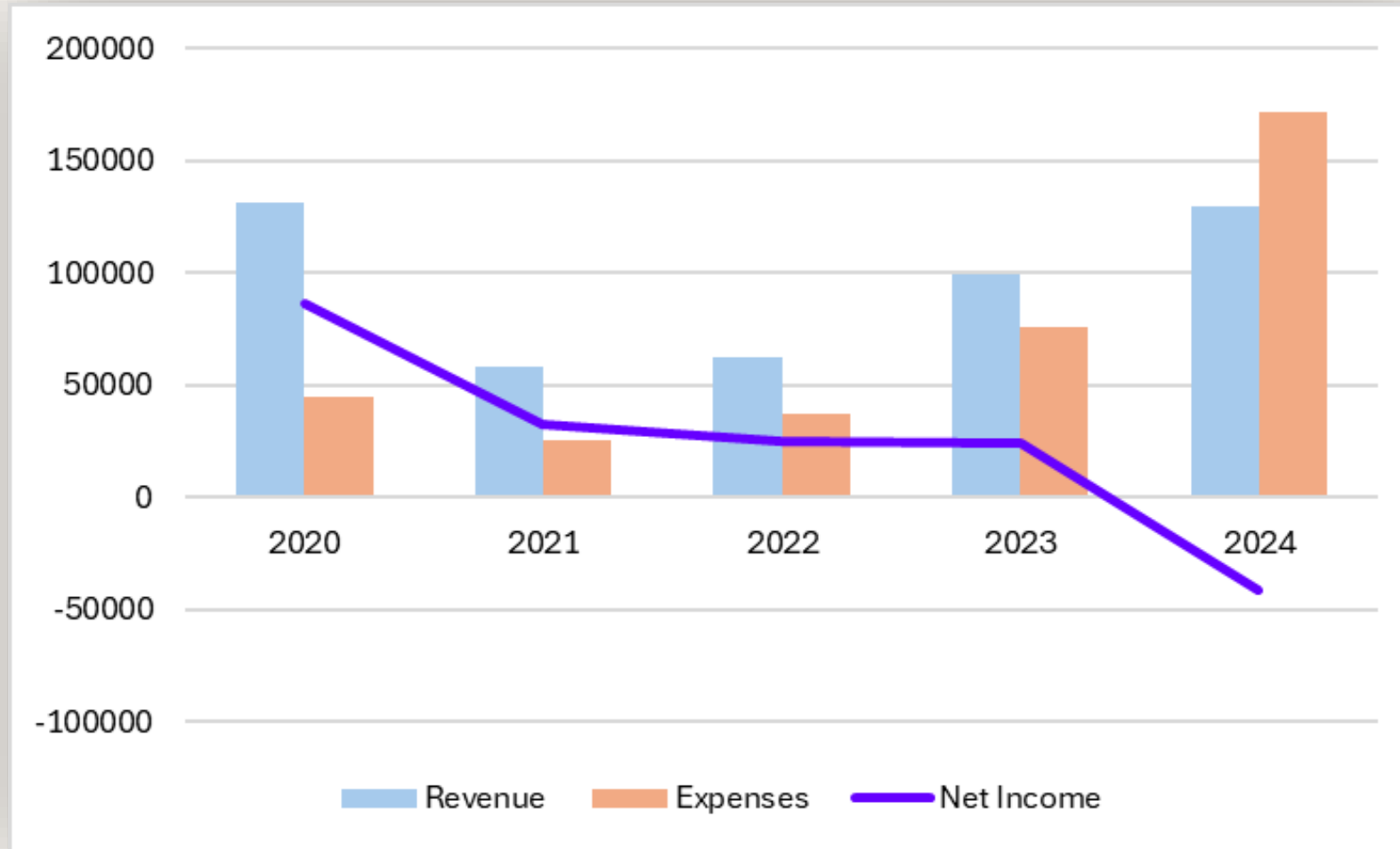
2024 Finance Summary

5-Year Expenses Trend by Portfolio



2024 Finance Summary

5-Year Chapter Net Income Trend



7:00 pm – 7:30 pm

2024 Chapter Accomplishments

Facilitators: 2024 Board of Directors



Board of Directors

2024 | Quarter 1



Deby Covey
President



David Doan
VP of Operations /
President-Elect



VP of Finance



Rose Otowo
VP of Marketing &
Communications



Nancy Watanabe
VP of Membership



Sean Kennedy
VP of PMO &
Administration



Pardha Akalamkam
VP of Program



James Jackson
VP of Technology



Vick Madenian
VP of Career
Development



Svetlana Averbukh
Immediate
Past President



Board of Directors

2024 | Quarters 2-4



Deby Covey
President



David Doan
VP of Operations /
President-Elect



VP of Finance



Rose Otowo
VP of Marketing &
Communications



Danielle Benson
VP of Membership



Sean Kennedy
VP of PMO &
Administration



Phoebe Johnson
VP of Program



James Jackson
VP of Technology



Vick Madenian
VP of Career
Development



Svetlana Averbukh
Immediate
Past President



Board of Trustees

2024



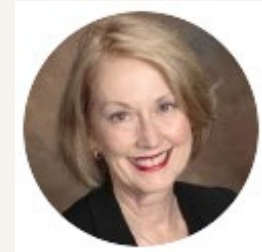
Barb Cooke
President 2008



AJ Jafari
President 2010



Kay Rathfelder
President 2015



Ida Harding
President 1999 - 2000

2024 Accomplishments

President



Deby Covey,
2024 President

- ✓ Continue to increase Membership through targeted marketing campaigns, and corporate outreach
 - ✓ Increase from 2,268 to 2,572 members (~ 12% growth)
- ✓ Continue to maintain membership retention through ongoing activities and in-person events throughout Los Angeles County
- ✓ Combined Commitment of 5,000 hours to PMI Hours for Impact with a Partnership Program for all projects that adhere to the United Nations 17 Sustainable Development Goals (SDGs)
 - ✓ Met 2,500 hours – 2023, 6 months in framework set up with over 1,600 hours; 2024, PMI changed the Social Impact Hours criteria and over 1,000 hours were submitted
- ✓ 50th Anniversary Celebration – Look for additional special events throughout the year – Big celebration will be at Universal Studios on June 1!
 - ✓ Universal Studios Hollywood event held June 1st with Social Impact Day 2 on June 2nd. 50th Celebration cakes, history books, and gifts handed out at all in-person events!
- ✓ September – Global PMI Summit will be held in Los Angeles **PMI Chapter of the Year!**

2024 Accomplishments

VP of Operations/President-Elect



David Doan,
2024 VP of
Operations/
President-Elect

Responsibility: Responsible for Operations and works with the President to be mentored for the role of President.

- ✓ Completed the Board of Directors' and Trustees' interviews to identify barriers, challenges, and common themes. Provided recommendations to address improvement opportunities.
- ✓ Completed the Volunteer Onboarding Toolkit:
 - ✓ Part 1: Benefits and Value of Volunteering
 - ✓ Part 2: Volunteer Application and Team Assignment
 - ✓ Part 3: PMI-LA Chapter Orientation
- ✓ Completed the Volunteer Engagement Program deliverables:
 - ✓ Strategies to Promote Volunteer Engagement
 - ✓ Volunteer Experience Survey
 - ✓ Volunteer Focus Group Questions
 - ✓ Volunteer Exit Interview Questions



2024 Accomplishments

VP of Operations/President-Elect



David Doan,
2024 VP of
Operations/
President-Elect

- ✓ Completed the following Leadership Development Program (LDP) deliverables:
 - ✓ Leader Candidate Application
 - ✓ Individual Development Plan (IDP)
 - ✓ Leader Candidate Self-Evaluation Form
 - ✓ Board Member or Trustee Evaluation Form
- ✓ Completed the Leadership Succession Planning Program: Strategies for Sustainable Nonprofit Growth
- ✓ Completed and administered the DEIAB Member Survey and summarized the survey respondents
- ✓ Completed the following DEIAB deliverables:
 - ✓ DEIAB Playbook
 - ✓ DEIAB Charter
 - ✓ DEIAB Policy and Procedures
 - ✓ DEIAB Launch and Workplan



2024 Accomplishments

VP of Finance



Meeta Autrey,
2024 VP of
Finance

Responsibility: Maintain and strengthen PMI-LA financial health.

- ✓ Continued improvements for the Finance team: develop desk procedures and cross-train volunteers
- ✓ Engaged external auditors for soundness examination of chapter financial and operational procedures
- ✓ Enhance vendor management process; this project was started in 2023 and will be formally rolled out to support best practices for third-party engagements.
- ✓ Continued supporting the Social Impact initiatives and plan for chapter events such as Beach Clean-ups and Day(s) of Giving at LA Food Bank
- ✓ Project Lead for the 50th Anniversary Celebrations
- ✓ Supported Chapter needs for the September Global Summit

2024 Accomplishments

VP of Programs



Phoebe Johnson,
2024 VP of
Programs

Responsibility: Produce a variety of impactful and engaging Programs to increase the visibility and value of PMI-LA Chapter.

- ✓ Continued to improve the Programs team and events despite the leadership transition which occurred in Q2
- ✓ Improved team collaboration, training and added more volunteers to support growing needs Programs team
- ✓ Continued to grow the Book Club and held their first in person event since 2020
- ✓ Grew the virtual Multi-Chapter Meeting partnerships and events – saw an increase of four additional chapters and in discussions to include the Small Chapter Community
- ✓ Held the Flagship Meeting in different regions within LA County with a variety of topics ranging from stakeholder management to military PMOs
- ✓ Implemented surveys for every event to ensure real time feedback
- ✓ Reinstated the Morning Meetings after an 18-month hiatus
- ✓ Continued to maintain Speaker Database and the Location Heatmap to support the development of events

2024 Accomplishments

2024 Program Registrations



Phoebe Johnson,
2024 VP of
Programs

Programs (as of 12/31/2024) • V = Virtual • IP = In-Person	# of Events		# Registered Members		# of Registered Non-Members		Average # of Registered Members Per Event	
	V	IP	V	IP	V	IP	V	IP
Book Club	4	1	88	18	14	5	22	14
Morning Meetings	1	-	12	-	-	-	-	12
Evening Meetings	2	-	20	-	-	-	10	-
Flagship Meetings*	1	4	116	113	-	14	116	32
Multi-Chapter Meetings**	17	-	451	-	96	-	27	-
Industry Networking Meetings	-	1	-	26	-	1	26	1
Total	25	6	687	157	110	20	N/A	N/A

*The January 11 Flagship Meeting is the virtual Annual Business Meeting.

**The number of registered members and non-members do not include other Chapters' participants for these Multi-Chapter Meetings.

Flagship Meeting (September) |

“Managing Business Application of AI Toward Realization of Value”

https://drive.google.com/file/d/1oQbvpNQvELeBXAGHITKXJyauH78Cs8jS/view?usp=drive_link

2024 Accomplishments

2024 Programs Comparison



Phoebe Johnson,
2024 VP of
Programs

Year • V = Virtual • IP = In-Person	# of Events		# of Registered Members		# of Registered Non-Members		Total	
	V	IP	V	IP	V	IP	V	IP
2020	28	5	961	119	67	8	1,028	127
2021	28	1	1,313	21	116	2	1,429	23
2022	30	5	707	105	291	22	998	127
2023	18	6	518	278	102	96	620	374
2024	25	6	687	157	110	20	797	177

Compared to 2023, in 2024 ...

- there was a **39% increase** of events that were held by the Programs team.
- there was a **33% increase** in registered members for virtual events.
- the number of in-person registrants **decreased by 53%**.
- the Programs team saw a **29% increase** in registration for virtual events.



Flagship Meeting (November) |

“Translating Military Project Management to Civilian PMOs”

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2024 Accomplishments

VP of Membership – took office in May



Danielle Benson,
2024 VP of
Membership

Responsibility: Managed member and volunteer engagement with the chapter and provided non-PDU opportunities for member value.

✓ **Membership Growth & Retention**

- ✓ Held two New Member Orientation events
- ✓ Planned two Membership Networking events; executed one Networking event
- ✓ Events were virtual and in-person during the year

✓ **Volunteer Opportunities**

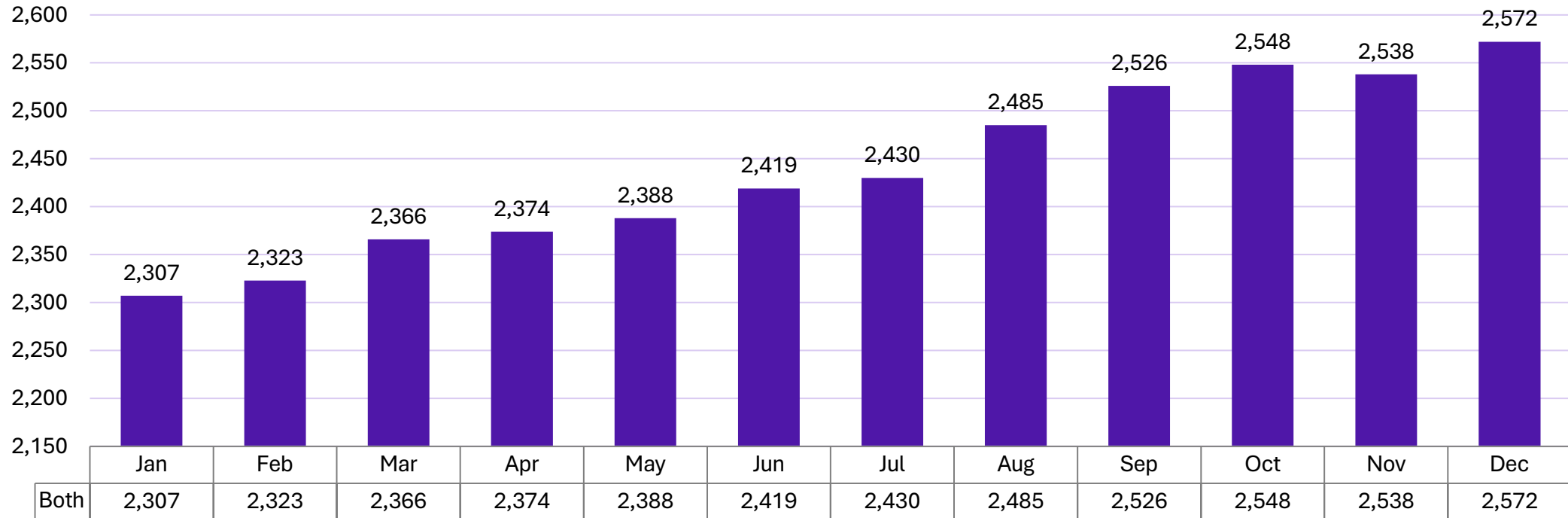
- ✓ Continued to post open chapter positions on the PMI-LA website for member growth and volunteer development
- ✓ Continued to promote Volunteer opportunities to get involved with PMI-LA's sustainability initiative(s)
- ✓ Worked with PMI to provide local Global Summit volunteers

2024 Accomplishments

2024 Membership Numbers



Danielle Benson,
2024 VP of
Membership



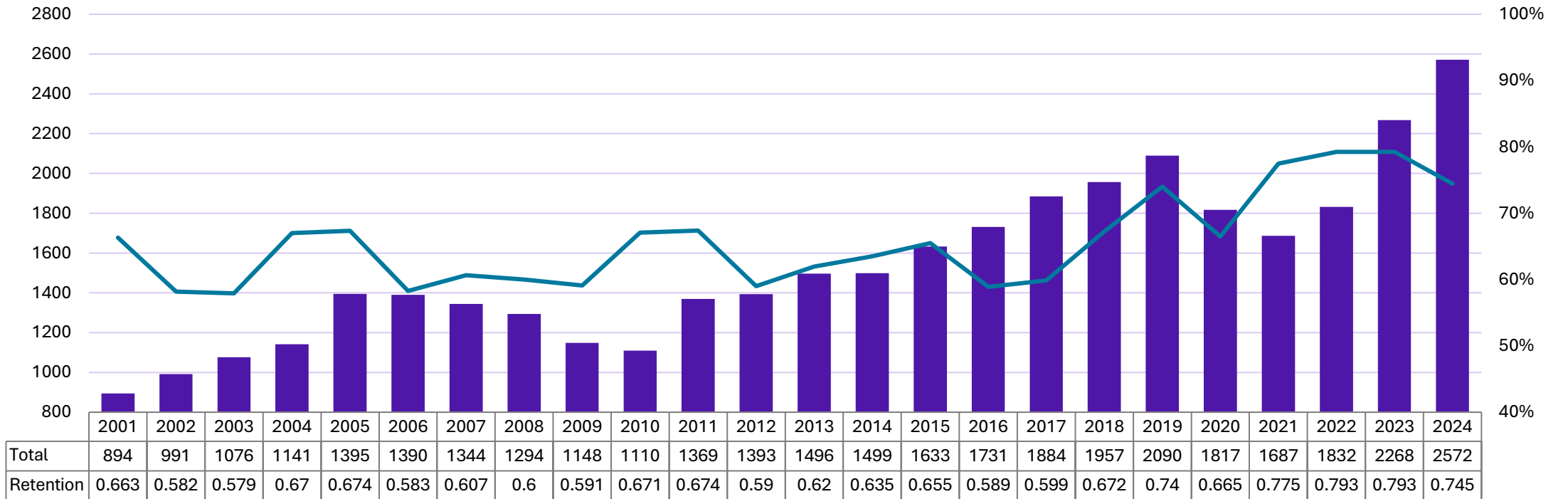
2024 Accomplishments

Historical Membership Numbers



Danielle Benson,
2024 VP of
Membership

Total Members and Retention Rate



■ Total — Retention

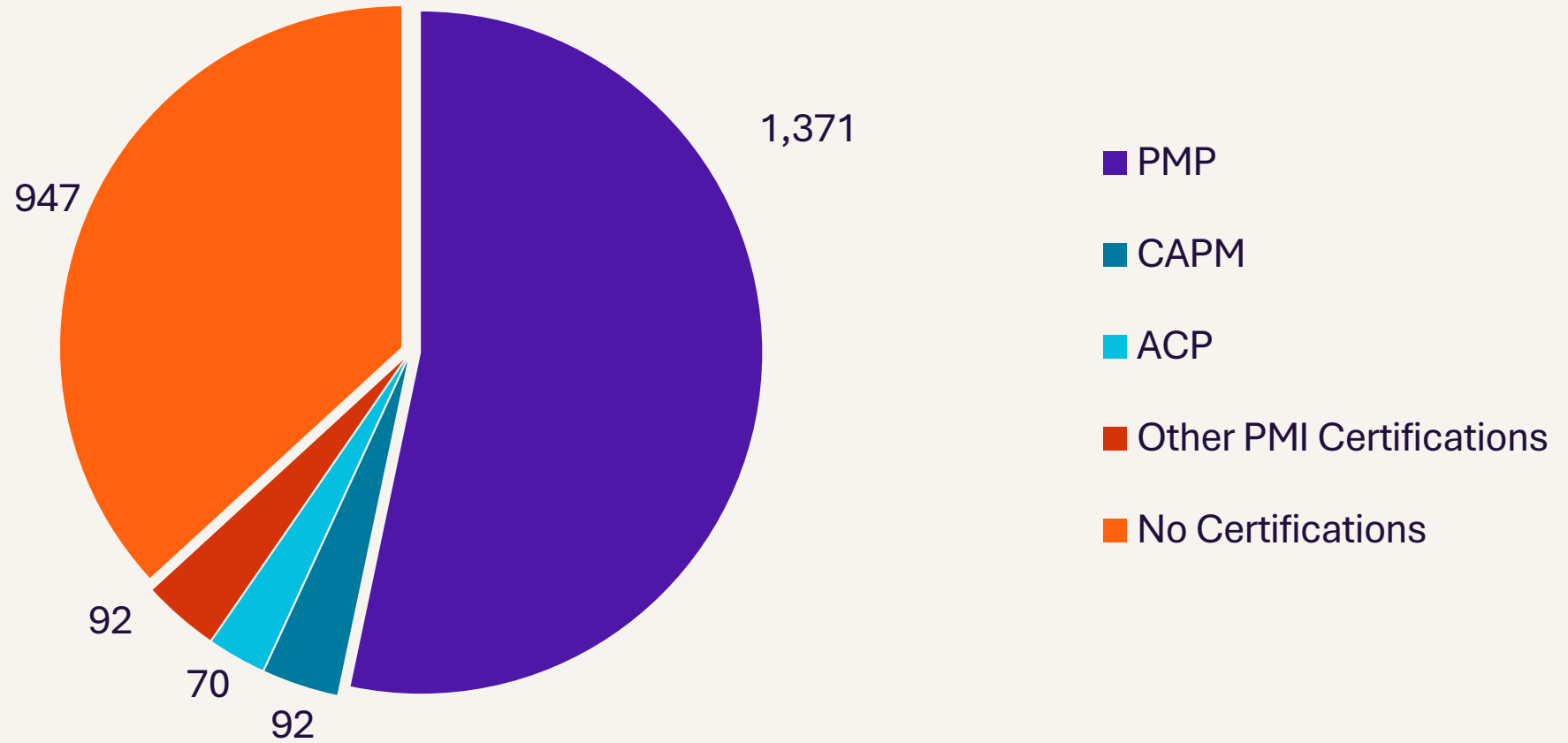


2024 Accomplishments

2024 End of Year Membership Certifications



Danielle Benson,
2024 VP of
Membership



Volunteer Recruitment Event (March)

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2024 Accomplishments

2024 Membership Event Registrations



Danielle Benson,
2024 VP of
Membership

Event	Event Date	Members	Non-Members	Total
Volunteer Recruitment Event (in-person)	March 9	36	7	43
Q2 New Member Orientation (virtual)	April 23	30	3	33
Chapter Networking Event Q3 (in-person)	August 27	44	9	53
Q4 New Member Orientation (virtual)	October 7	62	1	63
Chapter EOY Volunteer Appreciation Event (in-person)	December 12	55	0	55
		227	20	247

2024 Accomplishments

2024 Membership Events Comparison



Danielle Benson,
2024 VP of
Membership

Year	# Events	Members	Non-Members	Total
2021	5	165	18	183
2022	4	104	3	107
2023	4	158	23	181
2024	4 (2 virtual, 2 in-person)	191	13	204

Compared to 2021-2023, in 2024 ...

- There was a huge increase in attendance by members, especially for the October NMO
- In-person meetings draw interest from non-members

2024 Accomplishments

VP of Career Development



Vick Madenian,
2024 VP of Career
Development

Responsibility: Provide Career Development opportunities for the project management community.

- ✓ Career Development Events
- ✓ Demos of Project Management Related Tools & Services
- ✓ Mentorship Program
- ✓ PMP Prep Classes (set up and training)

2024 Accomplishments

2024 Career Development Events



Vick Madenian,
2024 VP of Career
Development

Career Development Event	Date	# of Members	# of Non-Members	Total
Mentorship Program	2024	38	*	38
Chapter Events (3)	2024	89	*	89
Vendor Events (5)	2024	*	*	*
Starting the work of Authorized PMP Prep Course offering for 2025 (training of instructors, simulating 5 weekend schedules, etc)	2024	N/A	N/A	N/A
				127+

Note: * No access to this data

2024 Accomplishments

2024 Career Development Events Comparison



Vick Madenian,
2024 VP of Career
Development

Year	# Events	Members	Non-Members	Total
2023	30	156	19	175
2024	8	127+	*	*

Compared to 2023, in 2024 ...

- 2024 had fewer events as well as continuous PMP, CSM, CSPO, Leadership sessions throughout the year due to:
 - Intentional strategic decision to focus on Career Development specific events
 - Vendors' business model changes from "commission based" (no pre-investment for the Chapter) to "direct sales" (requiring pre-investment for the Chapter)

2024 Accomplishments

VP of PMO & Administration



Sean Kennedy,
2024 VP of PMO &
Administration

Responsibility:

Lead a process-oriented PMO to support cross-functional project management, administrative, and secretarial duties for the PMI-LA Chapter. This includes maintaining official records, managing contracts, preserving chapter assets, and providing project management oversight for new initiatives and cross-functional efforts.

Accomplishments:

Strategic Planning and Framework Development

- ✓ Finalized the **Strategic Vision, Implementation Plan, and Iteration Plan/Roadmap** to guide departmental initiatives.
- ✓ Established a **Master Backlog** and **Departmental Architecture** to prioritize and organize projects.
- ✓ Defined an **Organizational Approach** to align with chapter goals.

2024 Accomplishments (Cont.)

VP of PMO & Administration



Sean Kennedy,
2024 VP of PMO &
Administration

Systems and Tools Implementation

- ✓ Developed and tested a **Resource Hub MVP** to centralize chapter tools and resources.
- ✓ Implemented **CoPilot**, a semi-automated notetaking tool that leverages artificial intelligence to enhance communication and documentation workflows.
- ✓ Designed and tested the **Project Intake & Assessment System MVP**, enhancing project prioritization and tracking processes.
- ✓ Implemented **Trello** as the chapter's project management platform, providing training and custom boards to streamline collaboration.

Operational and Change Management

- ✓ Defined **Sprint Planning** processes, introducing sprints and iterations to improve project execution.
- ✓ Initiated the **Change Management Plan**, with a draft currently in the finalization stage to ensure smooth adoption of PMO tools and processes across the chapter.
- ✓ Designed a comprehensive **Organizational Structure** to clarify roles and improve team collaboration.

Social Impact

2024 Events: Making a difference in the LA community

Event	Description
Flagship Meeting	Downtown Women's Center – Snack Packs (2)
Flagship Meeting	Midnight Mission – Hygiene Kits
Future Cities	Trophies & Snacks
Dream Center	Christmas Toy Giveaway
Heal the Bay (2)	Coastal Cleanup Day 2024, Nothin' But Sand Beach Cleanup on Earth Day.
Good Karma LA	Hygiene Kits

Heal the Bay Beach Cleanup (Santa Monica)

https://drive.google.com/file/d/11CYMKkEqacmXlOz32ZkdtBM7efXiQEuH/view?usp=drive_link

Social Impact

Project Management Without Borders (PMWB)

Project Management Without Borders (PMWB) connects professionals with nonprofits and NGOs to deliver projects aligned with the UN's Sustainable Development Goals, addressing critical global challenges.

Successes

- Met project timeline with strong coordination.
- Effective leadership, check-ins, and Trello use.
- Valuable content created for future projects.
- High turnout, positive engagement, and team dedication.

Obstacles

- Permitting reduced capacity.
- Volunteer fatigue and route challenges.

Improvements Needed

- Start marketing earlier; refine sponsor outreach.
- Enhance logistics (e.g., transportation, roles, and tools).
- Clarify partner coordination and reporting.

Impact

- Donation goal achieved.
- Positive feedback from partners and attendees.



Priya Means Love 5K Awareness Walk

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2024 Accomplishments

VP of Marketing & Communications



Rose Otowo,
2024 VP of
Marketing &
Communications

Responsibility: Maintain and strengthen PMI-LA Marketing and Communications.

- ✓ Membership growth – Targeted campaigns and focus on Social Media to reach Project Managers not a part of PMI-LA
- ✓ Retention – Continue Marketing events and fun facts to membership
- ✓ PMI Hours for Impact – Market chapter opportunities to the greater Los Angeles area
- ✓ Sponsor engagement
- **Accomplishments:**
 - ✓ Developed promotional materials for the 50th Anniversary event and effectively marketed it across all Chapter online platforms, resulting in a highly **successful celebration**.
 - ✓ Partnered with the Global team to promote GS24, leading to our Chapter receiving the award for "**Most Registrations**" at the event.
 - ✓ Recruited and trained **eight (8)** new volunteers for roles in Google Analytics, Newsletter/email writing, LinkedIn analytics and Canva design.

2024 Accomplishments

VP of Marketing & Communications



Rose Otowo,
2024 VP of
Marketing &
Communications

- ✓ Designed Chapter-branded promotional materials that boosted social media engagement by over 100%. - Successfully launched the **Chapter's TikTok account**.
- ✓ Produced short informational videos for Social Media to enhance the Chapter's thought leadership positioning.
- ✓ Collaborated with the Membership team to launch the **Volunteer Spotlight program**.
- ✓ Worked with PMWB to promote the Priya Means Love Walk event, which turned out to be a significant success.
- ✓ Engaged our members across various platforms by providing informational tips, quotes, and interactive polls on project management topics.
- ✓ Achieved a high member retention rate of nearly **75%**.
- ✓ Managed Chapter branding on the website and implemented necessary updates.
- ✓ Published the weekly **Scrolling Deck** on the Chapter website.
- ✓ Implemented PMI Global's **new branding guidelines** in the design of our marketing materials.
- ✓ Actively participated in Board of Directors meetings.

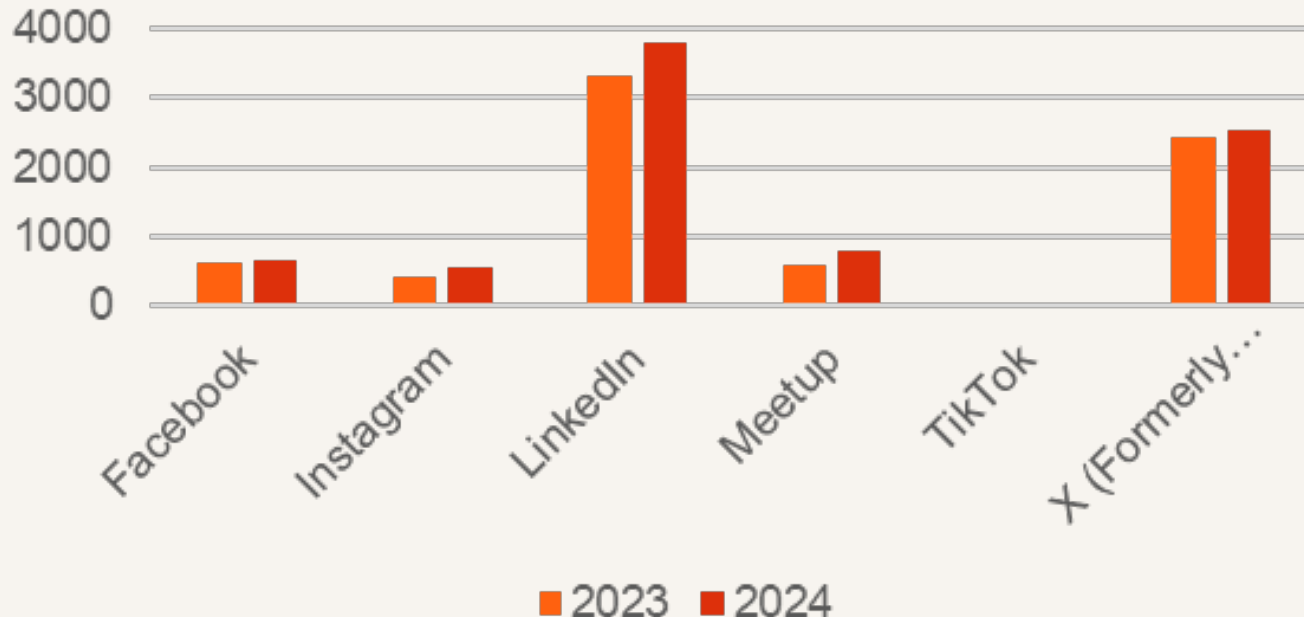
2024 Accomplishments

VP of Marketing & Communications



Rose Otowo,
2024 VP of
Marketing &
Communications

Social Media



- ✓ Social media growth in 2024:
 - ✓ **Twitter** following increase from 2,430 to 2,527 (~97 followers); **4% increased**
 - ✓ **LinkedIn** following increased from 3,300 to 3,810 (~510 followers); **15% increased**
 - ✓ **Facebook** following increased from 618 to 665 (~47 followers); **8% increased**
 - ✓ **Meetup** following increased from 601 to 794 (~193 followers); **32% increased**
 - ✓ **Instagram** following increased from 430 to 564 (~134 followers); **31% increased**
 - ✓ **TikTok** was **added** to our Chapter social media portfolio to better engage a new audience

2024 Accomplishments

VP of Technology



James Jackson,
2024 VP of
Technology

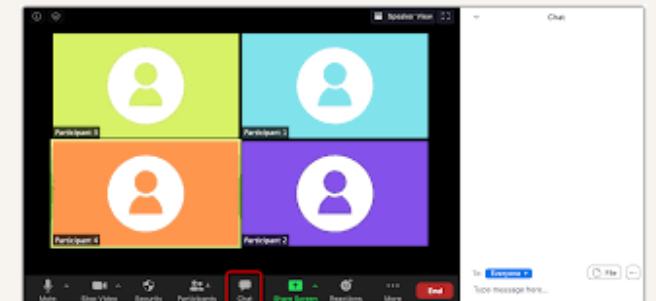
Responsibility: Ensure Chapter technology keeps with current industry standards as well as manage access across chapter tools.

- ✓ Reorganized the PMI-LA Website backend systems efficiency in operations and eased volunteer onboarding.
- ✓ Worked with the PMO & Administration team on the evaluation and implementation of the collaborative Trello application and the Artificial Intelligence (AI) productivity tool Microsoft Copilot.
- ✓ Conducted creative website design sessions with the Marketing, Programs, Membership, and 50th Anniversary teams.
- ✓ Helped increase chapter efficiency with the revamp of inquiry routing, Speaker Database creation, SharePoint organization process, improvement of security with Microsoft Defender, and migration to a faster website platform.
- ✓ Maintained and updated the PMI-LA website to ensure timely and quality dissemination of Member and PM-Community relevant content provided by all departments.
- ✓ Managed the administration of the PMI-LA Office365 tools.
- ✓ Provided Board and Committee training on IT best practices, Copilot, and website operations.

Member Feedback

Now, it's time for you to provide your feedback on our 2024 accomplishments

- We just reviewed a lot of information. This is a natural pause for you to ask questions and share comments on what you have heard and learned about PMI-LA 2024 reflections.
- Share your comments and feedback on how PMI-LA did in 2024. What did you like or dislike?
 - Use the Zoom Chat feature and enter your comments
- Please share ideas on how we can serve you better. What would you like to see different?



7:30 pm – 7:35 pm

Prioritization of 2025 Initiatives

Facilitator: David Doan



2025 Projects and Initiatives

Top 2025 projects and initiatives

2025 Project/Initiative*	Owner	# of Votes
1. Migration Planning to PMI VEP	PMO	9
2. Bylaws	Trustees	8
3. Chapter of the Year Celebration	Membership	8
4. Professional Development Day (PDD)	Career Development & Programs	6
5. Los Angeles Climate Week	PMO	4
6. Online Community	Operations	4

*Given the need to support wildfires relief efforts in Los Angeles, PMI-LA may need to re-prioritize or adjust the scope of our Top 6 projects and initiatives for 2025. We appreciate your understanding as we adapt to these extraordinary circumstances and focus on supporting our community's recovery.



7:35 pm – 8:00 pm

2025 Chapter Goals and Initiatives

Facilitators: 2025 Board of Directors



Board of Directors

2025



David Doan
President



Meeta Autrey
VP of Operations /
President-Elect



Robert Shake
VP of Finance



Rose Otowo
VP of Marketing &
Communications



Danielle Benson
VP of Membership



Sean Kennedy
VP of PMO &
Administration



Phoebe Johnson
VP of Program



James Jackson
VP of Technology



Vick Madenian
VP of Career
Development



Deby Covey
Immediate Past-
President



Board of Trustees

2025



Barb Cooke
President 2008



AJ Jafari
President 2010



Svetlana Averbukh
President 2022 - 2023

Team Player | Kaitlin Logsdon

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2025 Goals and Initiatives

President



David Doan,
2025 President

- **Ensure successful execution of the Top 6 priorities in 2025:**
 - Remove blockers and provide support
 - Regularly communicate progress with stakeholders
 - Ensure that sufficient resources are allocated Monitor and evaluate progress
- **Maximize project success to elevate our community** by applying the suggested actions (Start or Continue, Stop or Redesign) outlined in the “[PMI:Next – Guidance for Chapter Operations](#)” that PMI has suggested each chapter to consider.
- **Embody the “[PMI Culture Values & Behaviors](#),” apply the suggested exercises in the “[PMI Culture Guidebook](#),”** and internalize them into the work that PMI-LA is doing and holding ourselves accountable to influence culture in a positive way through collaboration and decision making.
- **Launch the Leadership Development Program (LDP) pilot program**



2025 Goals and Initiatives

VP of Operations/President-Elect



Meeta Autrey,
2025 VP of
Operations/
President-Elect

Primary Goal: Outreach, Outreach and more Outreach!



Additional Goals:

- Be a Resource for Various Teams:
 - Technology Team with PMI-Required Updates (PMI Volunteer Engagement Platform [VEP], Website)
 - Programs and Career Development with Professional Development Day (PDD) Planning Efforts
- Plan & Execute Annual Conference Schedules for BoD & Chapter Leaders
- Plan & Execute Strategy Sessions for Key Volunteers






2025 Goals and Initiatives

VP of Finance



Robert Shake,
2025 VP of
Finance

- **Enhance Financial Transparency**
 - Deliver **real-time financial dashboards**  Power BI and actionable reports to enhance visibility and trust.
 - 2025 Milestone: Present a comprehensive mid-year financial review at the business meeting.
- **Drive Revenue Growth and Diversification**
 - Secure sponsorships and grants to support innovative chapter programs and initiatives.
 - Forge a strategic alliance with  **USC**, specifically Bovard College and its [MS in Project Management program](#), to open pathways for academic collaboration and professional development.
- **Strategic Budgeting for Member Impact**
 - Prioritize resources for career advancement, professional development, and networking opportunities.
 - Champion funding for social impact programs, including 
- **Military Outreach: Bridging Communities - 203,231** civilian U.S. military veterans residing in **LA County!**
 - Expand outreach efforts to serve active-duty service members and veterans.
 - Provide career transition support through tailored mentorship, networking, and educational initiatives.

Risk Taker | Phoebe Johnson

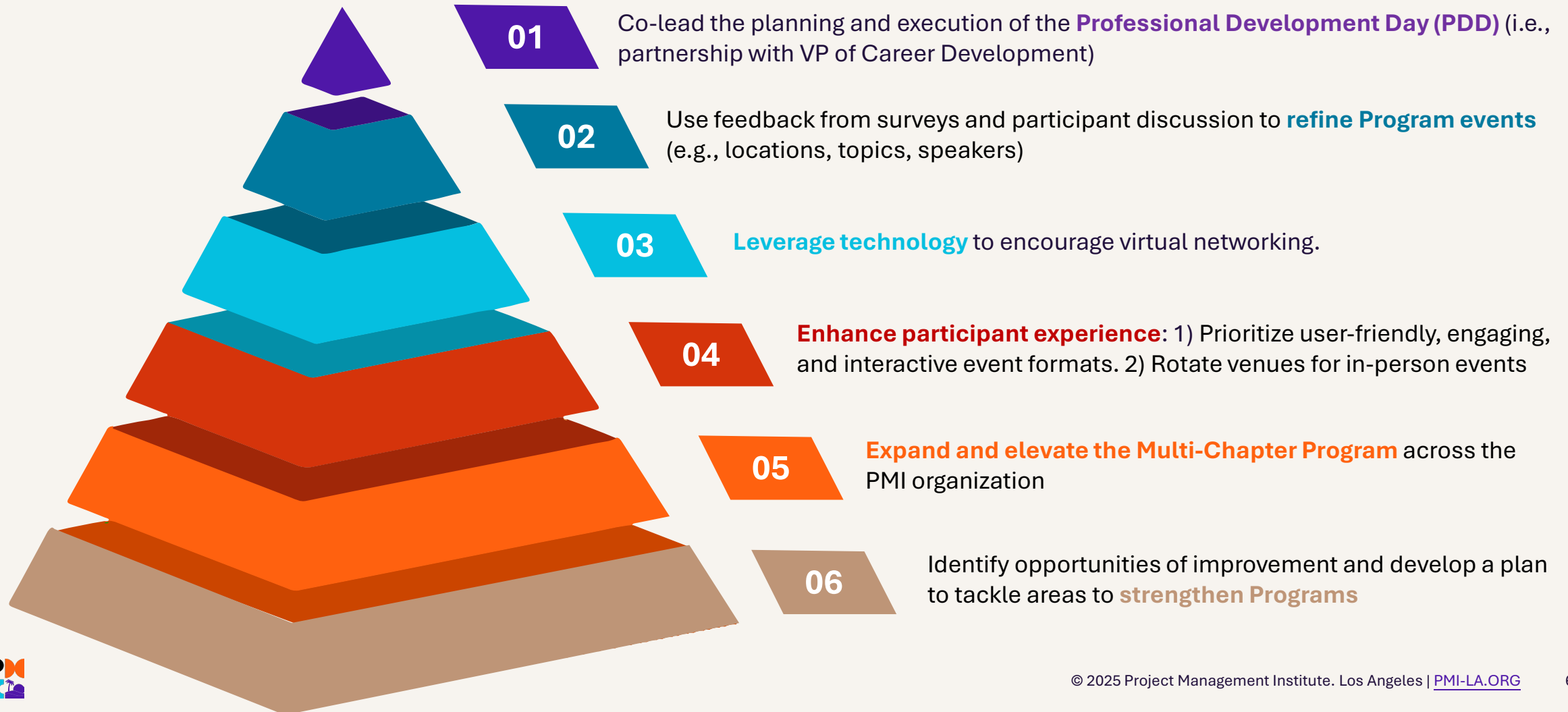
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2025 Goals and Initiatives

VP of Programs



Phoebe Johnson,
2025 VP of
Programs



2025 Goals and Initiatives

VP of Membership



Danielle Benson,
2025 VP of
Membership

Increase recruitment and retention for PMI-LA Members

Building Connections, Careers, and Community

Recruitment: Increase number PMI-LA Members by 5%.

1. Quarterly orientation sessions for new and prospective members.
2. Collaborate with other committees to put on programs focused on people in the early part of their career or people looking to switch into project management from another field.

Retention: Maintain ~70% retention.

1. Quarterly networking events with a theme (e.g., people looking for work, people looking to break into project management)
2. Twice yearly program on how to complete the PMP application
3. Collaborate with other committees to put on events focused on people in the early part of their career or people looking to switch into project management from another field.

Recognition: Thank the volunteers for the work they do.

1. Promo codes that allow those volunteering at an event to attend for free
2. Annual EOY Volunteer Recognition Event.
3. Awards for Volunteers: Individual, Special Recognition, and Charlie Lopinsky Volunteer of the Year Award
4. Monthly Volunteer Spotlight

2025 Goals and Initiatives

VP of Career Development



Vick Madenian,
2025 VP of Career
Development

- ✓ Career Development Events (Chapter and Vendor): 3-5
- ✓ Mentorship Program: at least 1 10-week session (Spring) and strive for a second session in Fall
- ✓ PMP Prep Classes: 1 session
- ✓ Professional Development Day (PDD): 1 session

Problem Solver | Angelo Salazar

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Roadmap

Sprints for PMO & Admin 2025



Sean Kennedy,
2024 VP of PMO &
Administration



TBD / 2025

Hardening 2024 Builds, Initiatives, & Supportive PMO

Solidify and memorialize tools/initiatives built or kicked off in 2024 (PMWB, Social Impact, Trello, Copilot, Project Intake & Assessment, Resource Hub, Supportive PMO).



TBD / 2025

Social Impact

Finalize operational plan and build Talent Pool MVP for Social Impact initiatives, including PMWB.



TBD / 2025

Internal Operations

Identify and strengthen operational inefficiencies within PMO & Admin.

Game Player | Steve Marlin

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2025 Goals and Initiatives

VP of Marketing & Communications



Rose Otowo,
2025 VP of
Marketing &
Communications

1. **Enhance Brand Awareness and Grow Social Media Following:** Increase brand recognition of the Chapter within the local project management community. We plan to do this by launching the *“What Lights You Up”* **“Brand Platform of Light the Way”** social media campaign. We have set an ambitious growth target of **20%** for LinkedIn and Instagram, respectively.
2. **Grow membership by 5% by the end of 2025**, with a focus on underrepresented groups in project management, revamp our Military Outreach program targeting stakeholders in the LA area, students and increase our TikTok following by **50%**.
3. **Improve Communication Strategy:** Enhance internal and external communication effectiveness, achieving a **10%** increase in engagement metrics (open rates, click-through rates) for the Chapter's newsletter and other email communication.
4. **Leverage Technology and Digital Platforms:** Implement new digital tools such as AI and SEO to streamline marketing efforts and improve the Chapter's visibility in local search results.
 - i. **Initiatives:** We will continue to collaborate with Technology in website design sessions to elevate user experience, and update the most relevant information.

2025 Goals and Initiatives

VP of Marketing & Communications



Rose Otowo,
2025 VP of
Marketing &
Communications

5. **Position PMI-LA in the PM *Thought Leadership* Space:** Launch a monthly blog featuring thought leadership articles and interviews by PM experts, Chapter members and guest contributors. Other idea is starting a podcast.
6. **Strengthen Relationships with Current Sponsors and Solicit New Ones:** Improve communications with our sponsors, which includes regular check-ins, providing updates on Chapter activities and continuing to highlight them in the Chapter's marketing materials and platforms. Recruit new ones at Flagship events. We aim to add **2** new sponsors in 2025.
7. **Continue to Maintain Quality Adherence to PMI Global's Brand Guidelines:** Ensure that all our promotional material meet the minimum branding requirements as set forth by Global maintaining the knowledge and capability amongst our designers through frequent trainings and re-trainings.

That's our 2025 7-Point Agenda!

2025 Goals and Initiatives

VP of Technology



James Jackson,
2025 VP of
Technology

- Software consolidation under Technology to improve efficiency
- Gap analysis and migration to a new Volunteer Tracking System
- Assist with rollouts for:
 - Trello
 - Microsoft Copilot
 - Password vault solution
- Ongoing support as needed

8:15 pm – 8:20 pm

PMI Los Angeles Wildfires Relief and Recovery

Facilitators: David Doan, Social Impact Team



PMI Los Angeles Wildfires Relief and Recovery

PMI-LA is taking action to ensure that we provide support to our members and Los Angeles community

-  **Taking Action:**

1. Formed a dedicated **PMI Los Angeles Wildfires Relief & Recovery Task Force**.
2. Launched “[PMI-LA Los Angeles Wildfires Relief and Recovery Survey](#)” to assess member needs and provide support.
3. Created an [Amazon Wishlist](#) for donors to buy supplies that nonprofit organizations in need of donations. We are asking PMI to promote this donation drive to all other PMI Chapters.
4. Created a “[PMI-LA Community: Wildfires Support Network](#)” Facebook Group for community support and information sharing.
5. Creating a dedicated PMI-LA webpage that will include trusted organizations and resources for members to access.
6. Developing checklists, project plans, and guides for those impacted (evacuation, rebuilding, financial assistance, insurance guide, etc.).

-  **Collaborating & Connecting:**

1. Partnering with local nonprofits to provide volunteer support and resources. We have reached out to the 17 nonprofit organizations that we have relationships with to see how we can help.
2. Connecting with PMI's global community for insights on rebuilding and sustainability.
3. Seeking guidance from the PMI and PMWB on wildfires recovery and other disaster recovery efforts.

-  **Long-Term Vision:**

1. Compiling knowledge on rebuilding for climate resilience and sustainability.
2. Developing proactive guidance for nonprofits on volunteer capacity building and other challenges.

-  **Stay Informed:**

1. Our PMI-LA Board of Directors will socialize and update all of this information to our PMI-LA members at this virtual PMI-LA 2025 Annual Business Meeting for updates.
2. Watch for ongoing communication via email, newsletter, and social media.





PMI Los Angeles Wildfires Relief and Recovery

PMI-LA is taking action to ensure that we provide support to our members and Los Angeles community



PMI Los Angeles Chapter Wildfires Relief & Recovery

Jan 12, 2025 | Los Angeles, CA

PMI Los Angeles Wildfires Relief & Recovery Survey

The recent wildfires in Los Angeles have deeply affected our community. During this challenging time, we want to support those impacted.

This survey will help us understand your current situation and identify ways we can support each other. Your responses will be kept confidential and used to coordinate assistance within our PMI-LA community. The survey includes questions about:

- Your current location and status
- Any assistance you may need (housing, supplies, etc.)
- Resources you may be able to offer to others

We encourage every member to participate in the survey regardless of whether you have been directly impacted by the fires. Your input can assist those in need. We stand together as a community, and your participation in this survey is a crucial step in ensuring everyone receives the help they need. Thank you for your time and cooperation.

Sincerely,

The PMI-LA Board of Directors



Community: Wildfires Support Network

11 members



[+ Invite](#) [Share](#) [Joined](#) [▼](#)

[Discussion](#) [People](#) [Events](#) [Media](#) [Files](#)



8:20 pm – 8:30 pm

Q&A and Closing

Facilitators: All



Why Join PMI-LA

https://drive.google.com/drive/folders/1_IYl4Ow3GiXhg_TlrPZqaWhs-fuH0r_

Closing

Accessing the 2024 Summary on PMI-LA website

- This PowerPoint presentation will be uploaded to the PMI-LA Chapter website within a week.

- Access the presentation here:

- **About** > **Governance** > **Annual Reports** > **2024 Summary**

The screenshot shows the PMI-LA website header with the logo, navigation links (CONTACT US, FAQs, ADMIN LOGIN, MEMBER LOGIN, JOIN OR RENEW PMI), and a main menu (About, Membership, Calendar, Career Development, Programs, Marketing, Members Only, Jobs!). A dropdown menu is open under 'About', showing 'About PMI-LA', '2025 PMI-LA Board of Directors Candidates' Statements', 'President's Corner', 'PMI-LA Trustees', 'Governance', 'Wall of Fame', and 'Social Impact'. The 'Governance' dropdown is further expanded, showing 'Strategic Plan', 'Chapter Bylaws', 'Board of Directors Meetings', and 'Annual Reports'. An orange arrow points to the 'Annual Reports' link. Below the navigation, the page content includes a 'Welcome to PMI Los Angeles' section and a '2024 PMI-LA Board of Directors' section.

Upcoming Events

Registration & more information available on the PMI-LA website

- **01/28/2025 – Multi-Chapter Meeting:** Shattering Glass Ceilings: Break Barriers and Pave the Way (Virtual)
- **02/18/2025 – Multi-Chapter Meeting:** Shattering Glass Ceilings: Break Barriers and Pave the Way (Virtual)
- **02/22/2025 – Book Club** | "The Systems Thinker: Essential Thinking Skills For Solving Problems," by Albert Rutherford (Virtual)
- **02/22/2025 - PMI-LA 2025 Volunteer Recruiting Event** (Manhattan Beach Public Library)



The collage features four distinct images. Top left: A woman with glasses and a brown top. Top right: A man with glasses in a suit. Bottom left: The book cover for 'THE SYSTEMS THINKER' by Albert Rutherford, which includes the subtitle 'Essential Thinking Skills For Solving Problems, Managing Chaos, and Creating Lasting Solutions in a Complex World' and an illustration of interlocking gears. Bottom right: A red 'VOLUNTEERS NEEDED' sign with several colorful hands raised in front of it.

2025 Flagship Meetings

Flagship meetings are in person events



Feedback Needed!

Earn your PDUs by answering this survey!

Go to

www.menti.com

Enter the code

5988 2057



Or use QR code

Questions & Comments





Thank you!