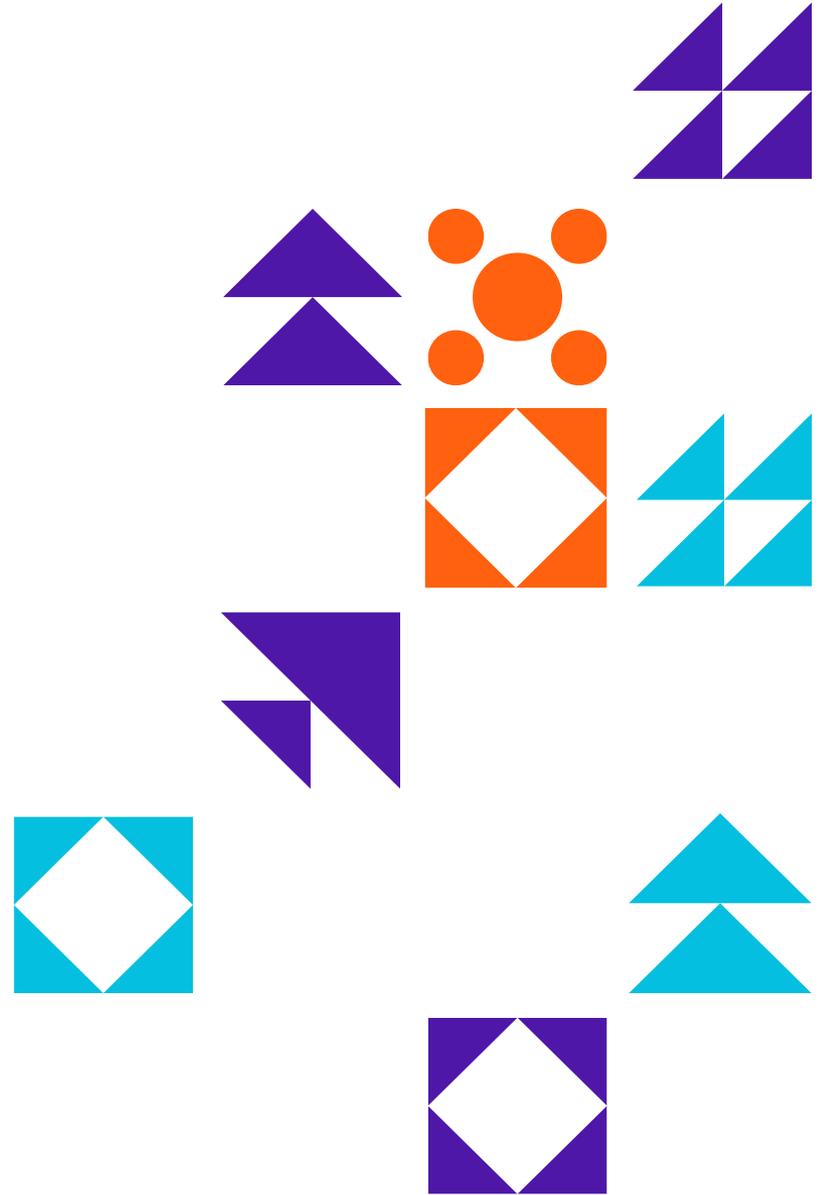


# 2020 Chapter Business Summary

January 14, 2021

Presented by Dennis Chang, Past President



Inside and Outside Our Chapter

# INITIATIVES

# Flashback: 2020 Vision

## President, Dennis

1. PMI-LA valuable & accessible
  - Home for LA PMs
  - Tool for LA PMs
2. Operational Platform for the new Decade
  - Start with basics
  - Build up with new volunteers
3. Build a Sustainable Leadership Team
  - Make it fun
  - Share the fun

# **VP of Strategy/President-Elect → VP of Operations/President-Elect – Svetlana (SK)**

- Partner with the President to Establish the 2020 Platform
- Priority focus: Support the Professional Development

# 2021 Member Feedback

Please enter in the CHAT anything that you would like to see this year that would “engage” you as a member?

# Vp of Finance - Meredith

## Responsibility:

Maintain and strengthen PMI-LA financial health

## 2020 Priorities

- ✓ Recruit Finance Committee
- ✓ Review and update financial policies and procedures
- ☒ Report PMI-LA finances monthly to BoD
- ✓ Prepare semi-annual financial reports for taxes, audit, and for Chapter
- ✓ Maintain PMI-LA financial accounts & records

# VP of Administration → VP of PMI & Administration - Yolanda

- One Tool to locate all Organizational Processes – focus on single data repository with levels of access for Public/Members (Website), Volunteers (O365 Teams), and BoD Members
- One Calendar for all internal and external events to avoid conflicts; assist to schedule marketing promotion; fundamental database of PMI-LA
- Asset Management – location of Chapter Laptops & Projectors; development of Responsibility Contract

# VP of Communications → VP of Technology - Vick

- By-laws change from Communications to VP of Technology expected in 2020 - Done
- take us to a data driven organization – all data consolidated into 1 location (O365/SharePoint) – all tools consolidated
- Use technology to make the entire chapter more streamlined – Full year of use of new technologies
- Event check-in thru technology – no Face-to-face meetings, deferred until Fall 2021
- Website – analyze and utilize new features – on-going
- O365 – Restructure for BoD transitions – Need to document and train full transition of changing aliases.

# VP of Marketing & Outreach →

## VP of Marketing & Communications- Deby

- Google Analytics Review of current new processes compared with last year – GA was not functional from our website before December, measured engagement by Mailchimp open clicks and Social Media increased following
- SEO: Search Engine Optimization – website SEO is tied to GA (so was not possible on 2020)
- Cross Functional Processes to get necessary information to Marketing Earlier – implemented campaign tracked on TEAMS and meet weekly with all Marketing teams
- Outreach: Academic – Continue work with USC/Downtown LA Program – Shifted to Zoom, alternate months, with some unique engagement ideas for students including networking with other chapters and “Hiring Tips” session with companies that are hiring
- Outreach: Military – Continue Military Discounts; Another USS IOWA Programs Event – shifted to only offering Military discounted classes via Zoom

# VP of Programs - Meeta

- VP Programs transition in March 2020
  - Vacant position filled by Meeta Autrey by Board nomination and approval.
- Programs events moved to virtual due to the Pandemic
  - With the County restrictions, the volunteer team had to quickly pivot to online events. While attendance was possible from your own home, it was beneficial to continue having the meetings hosted by local Directors and their amazing volunteer teams allowing members local to the area stay connected.
  - Schedules for local events also stayed the same (North LA - bi-monthly, Pasadena - monthly morning meetings, South Bay - quarterly)
  - Costs reduced to \$5 for members to cover nominal administrative costs.
  - A new Flagship team was recruited in preparation for quarterly onsite/rotational meetings, once permitted. The team is trained and will continue to plan quarterly virtual meetings until such time that we are permitted to go back. A huge thank you to Kathrine, one of our co-directors of Flagship meeting, for putting on today's event.

# VP of Programs - Meeta

- Adoption of Zoom for events / increased attendance
  - One of the challenges faced was learning to host Zoom meetings very quickly (as have a LOT of us this year). However, this also gave us an opportunity to serve our members in a virtual setting and we saw a lot more participation for our events, including the Book Club.
- Volunteer team updates
  - A huge thank you to all the current Program team volunteers for supporting the chapter this year. Going remote didn't require as many volunteer hours as onsite events go, but we hope to return to local onsite networking event this year. We are always looking to add to our team in preparation for the onsite requirements so if anyone is interested in hosting or being part of their local chapter meeting, or would like to support the Programs team in a remote/administrative role, please reach out to Kimberly, our new VP Programs for 2021!

# VP of Professional Development → VP of Career Development - James

- Shift from Professional Development to Career Development by including more soft skills training in addition to educational classes
- Pivot to virtual events due to COVID-19
- Conduct Annual Survey to determine 2021 training needs
- Mentorship Program
- Job Board improvement

# VP of Membership – Eric

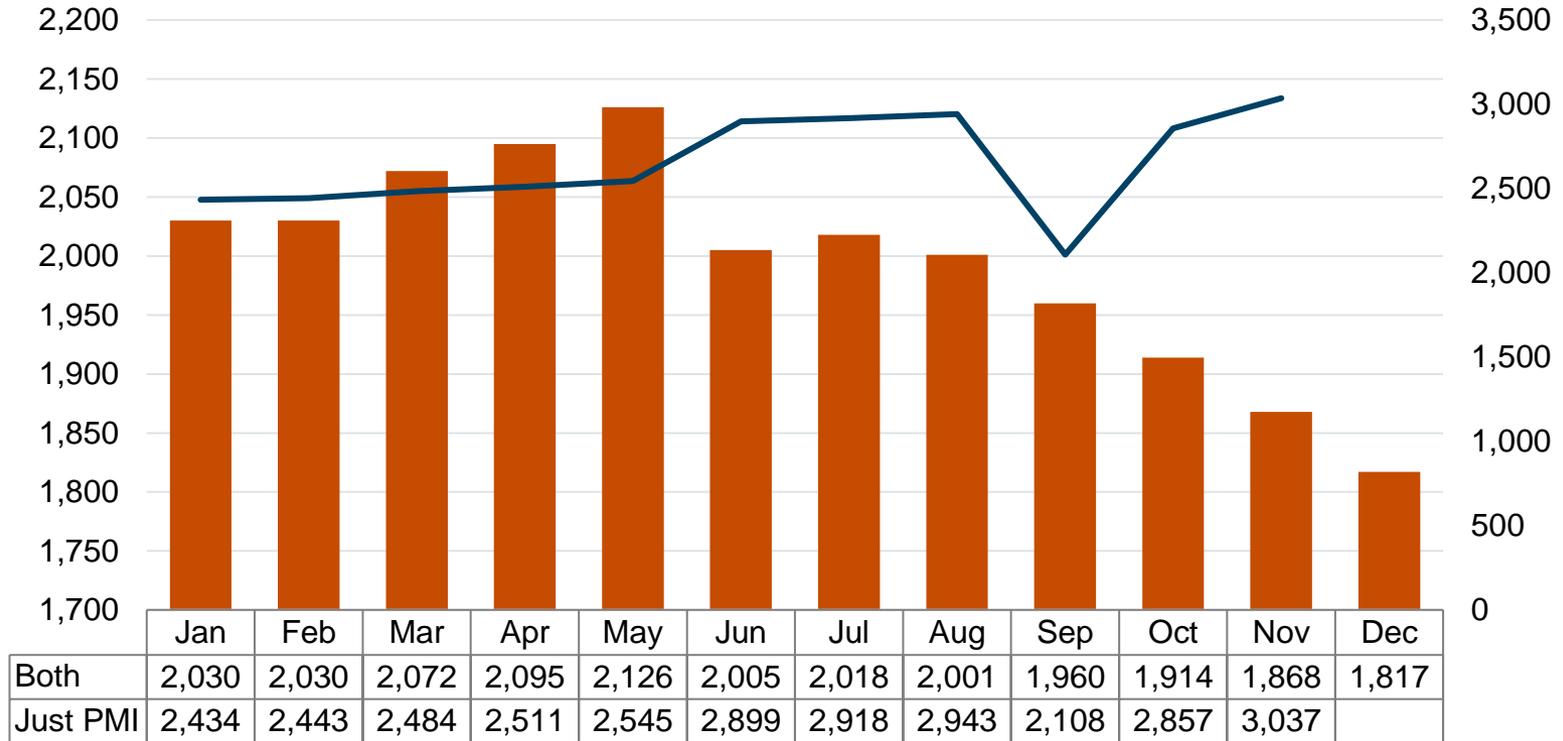
- Shift from in-person to Zoom networking events
- Total Active Volunteers: 79
- Total New Volunteers: 25
- Completed 2020 Events
  - Volunteer Recruiting
  - Virtual Game Night
  - Evening of Meditation
  - End of Year Volunteer Appreciation

Inside and Outside Our Chapter

# ENGAGEMENT

# 2020 Membership Numbers

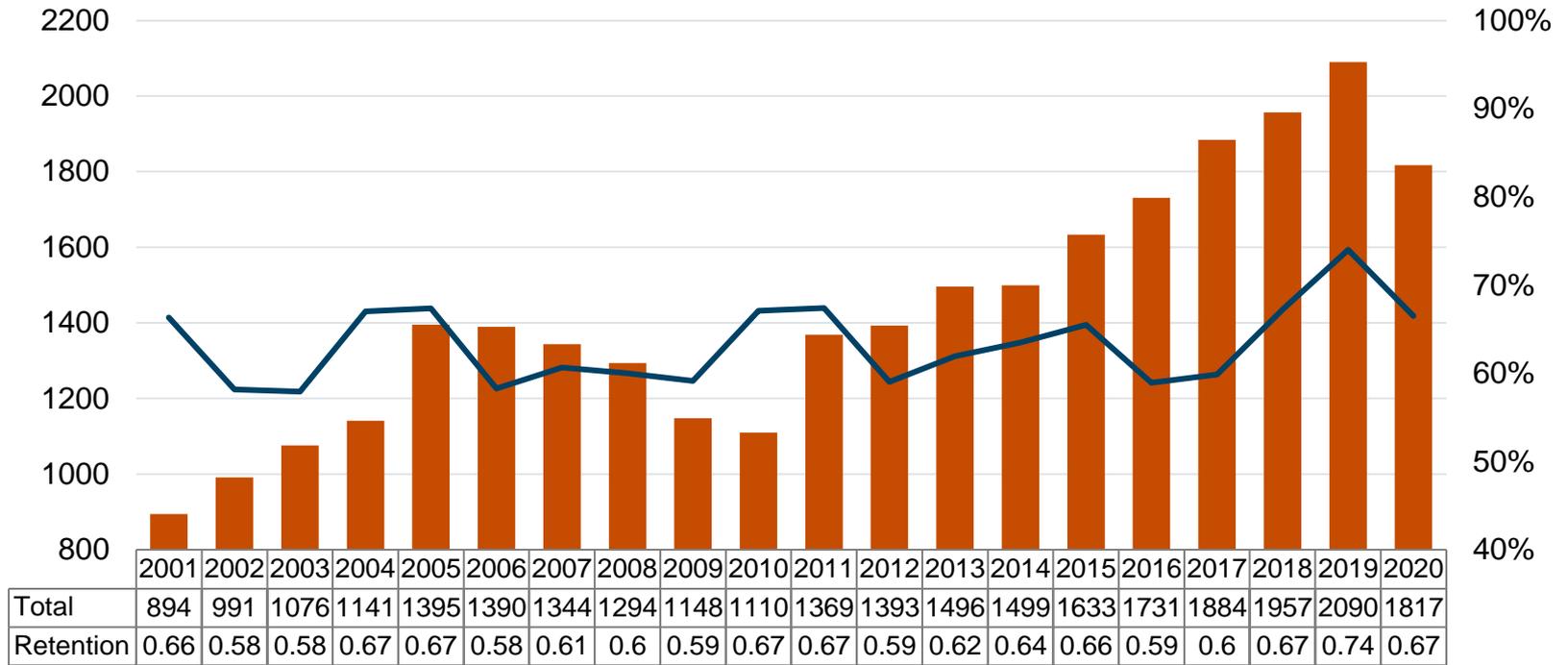
## Members in LA of the Chapter and PMI



Both Just PMI

# Historical Membership Numbers

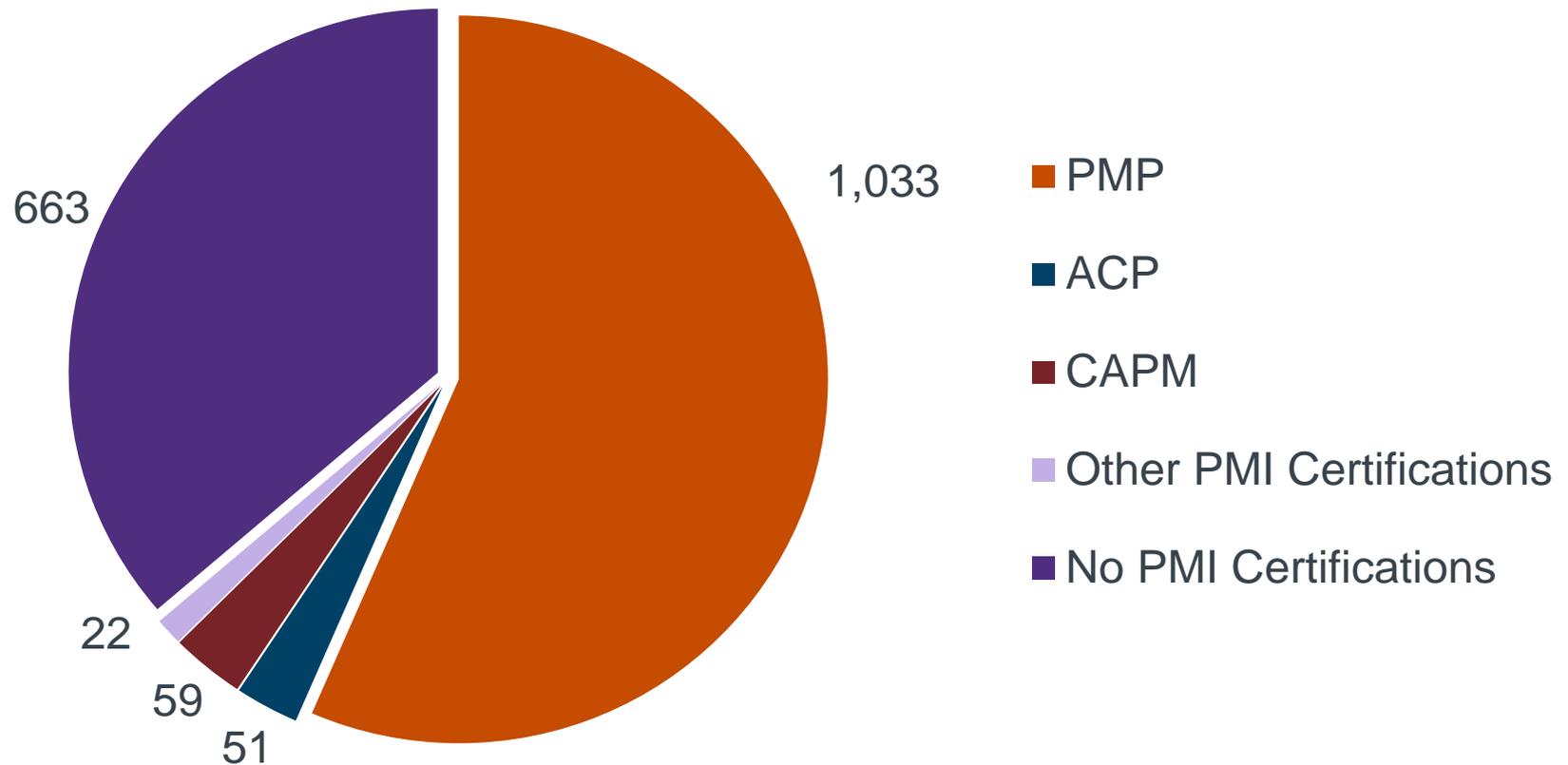
## Total Members and Retention Rate



■ Total    — Retention



# End of Year Membership Certifications



# Programs Registration

Program	Meetings F2F/Virtual	Members F2F/Virtual	Non- Members F2F/Virtual	Average F2F/Virtual
Culver City *	1 / 1	27 / 33	2 / 4	29 / 37
DTLA & Academic Outreach **	0 / 3	0 / 97	0 / 17	0 / 38
North Los Angeles	1 / 5	18 / 233	6 / 32	24 / 53
South Bay	0 / 3	0 / 59	0 / 5	0 / 21
Live Webinar	0 / 5	0 / 140	0 / 9	0 / 30
Pasadena ***	3 / 6	74 / 309		25 / 52
Book Club ***	0 / 5	0 / 90		0 / 18
	<b>5 / 28</b>	<b>119 / 961</b>	<b>8 / 67</b>	

\* Culver City– includes AGM, Daimler Trucks North America

\*\* Downtown changed format to Evening Meeting with higher attendance

\*\*\* Free Events, so attendance is different from Registrations

# Career Development Events

Professional Development	# of Members	# of Non-Members	Total
CAREER DEV   Servant Leadership that Gets Sh*t Done	4	2	6
CAREER DEV   The Art of Leading a Team that Gets Sh*t Done	21	2	23
CAREER DEV   The Brand Called You	97	0	97
CAREER DEV   The Brand Called You Interactive Workshop Series	6	0	6
CAREER DEV   Your Competitive Advantage	33	0	33
PMP Prep Course - March 7 to April 4	8	2	10
PMP Bootcamp   Sept. 18-19 and Sept. 26-27 2020	7	1	8
PMP Bootcamp   Oct. 17-18 and Oct. 24-25 2020	4	0	4
Dream Job Catcher   Intentional Career and Successful Job Search	50	6	56
The 2021 PMP Exam Presentation	34	10	44
	<b>264</b>	<b>24</b>	<b>287</b>

# Membership Event Registrations

Program	Members Registered	Non-Members Registered	Total Attending
Volunteer Recruiting Event	32	2	34
Networking – Never Have I Ever	30	0	30
Meditation to Reduce Stress	30	0	30
	<b>92</b>	<b>2</b>	<b>94</b>

2020 Snapshot and 2018-2020 Trends

# FINANCE

# Financial Overview

	2019 Actuals	2020 Budget	2020 Actuals	Variance
Total Chapter Revenue	102,373	88,745	71,483	-17,262
Total Chapter Expenses	78,343	112,856	44,494	-68,362
<b>Chapter Net</b>	<b>24,031</b>	<b>-24,111</b>	<b>26,990</b>	<b>51,101</b>

## Current Assets as of Dec. 31, 2020

Checking Account	\$212,223
Investment Account	\$149,703
CD's	\$68,900*
PayPal	\$19,714
<b>Total</b>	<b>\$450,540</b>

\*Estimate

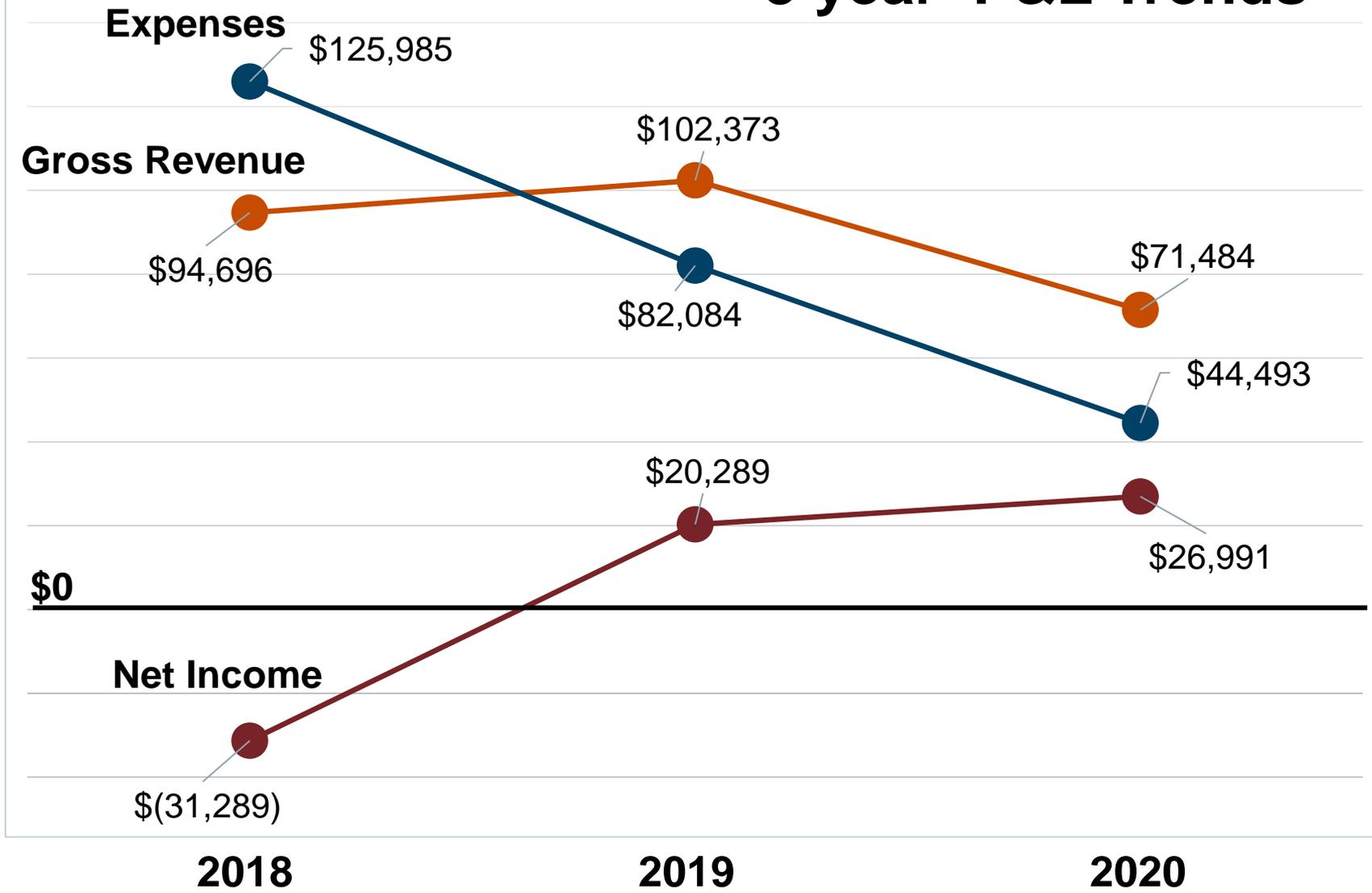
## Reserves Ratio

Assets	\$450,540
Expenses	\$44,494
	10.13

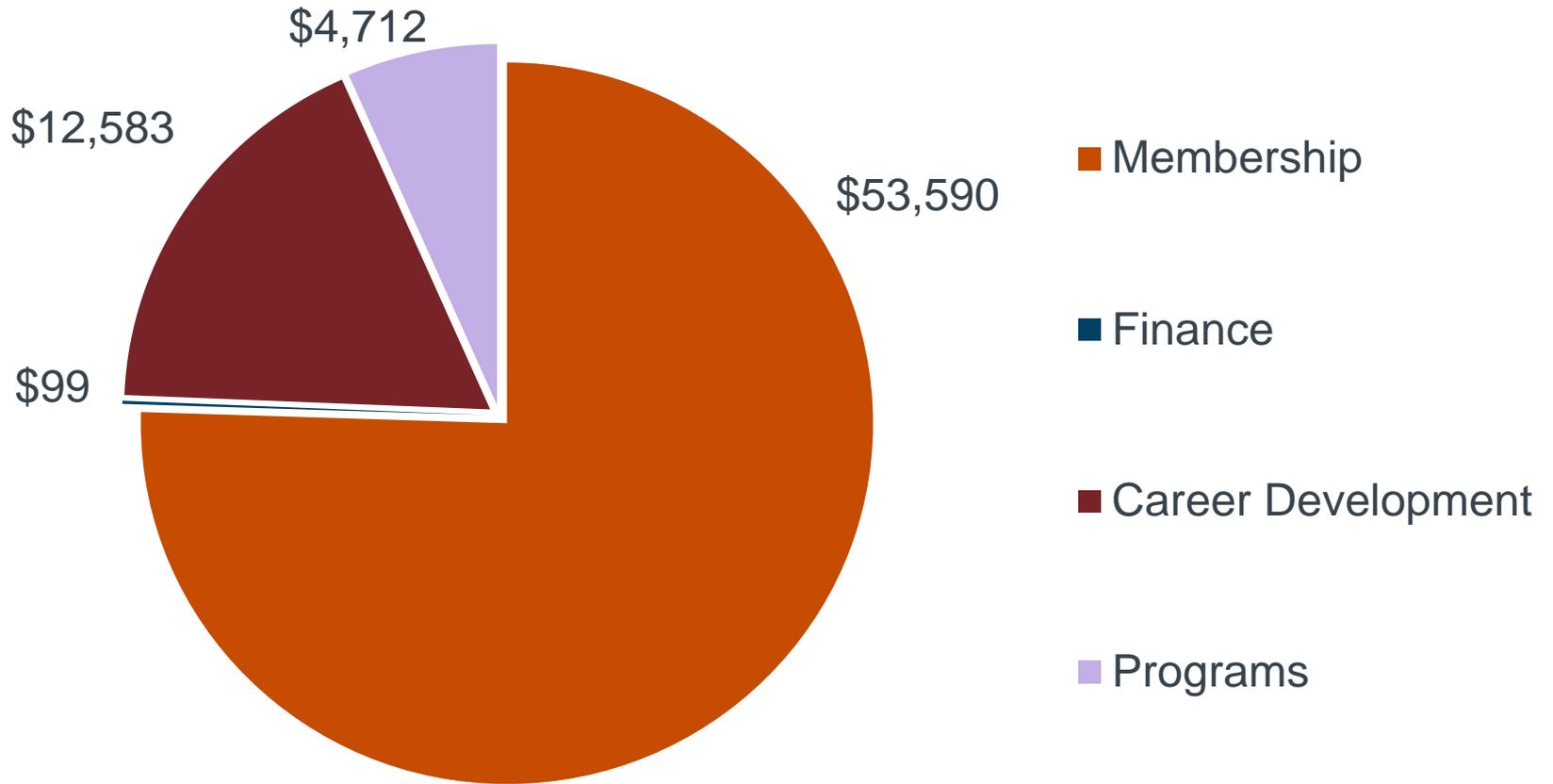
## Surplus Capital

\$368,535

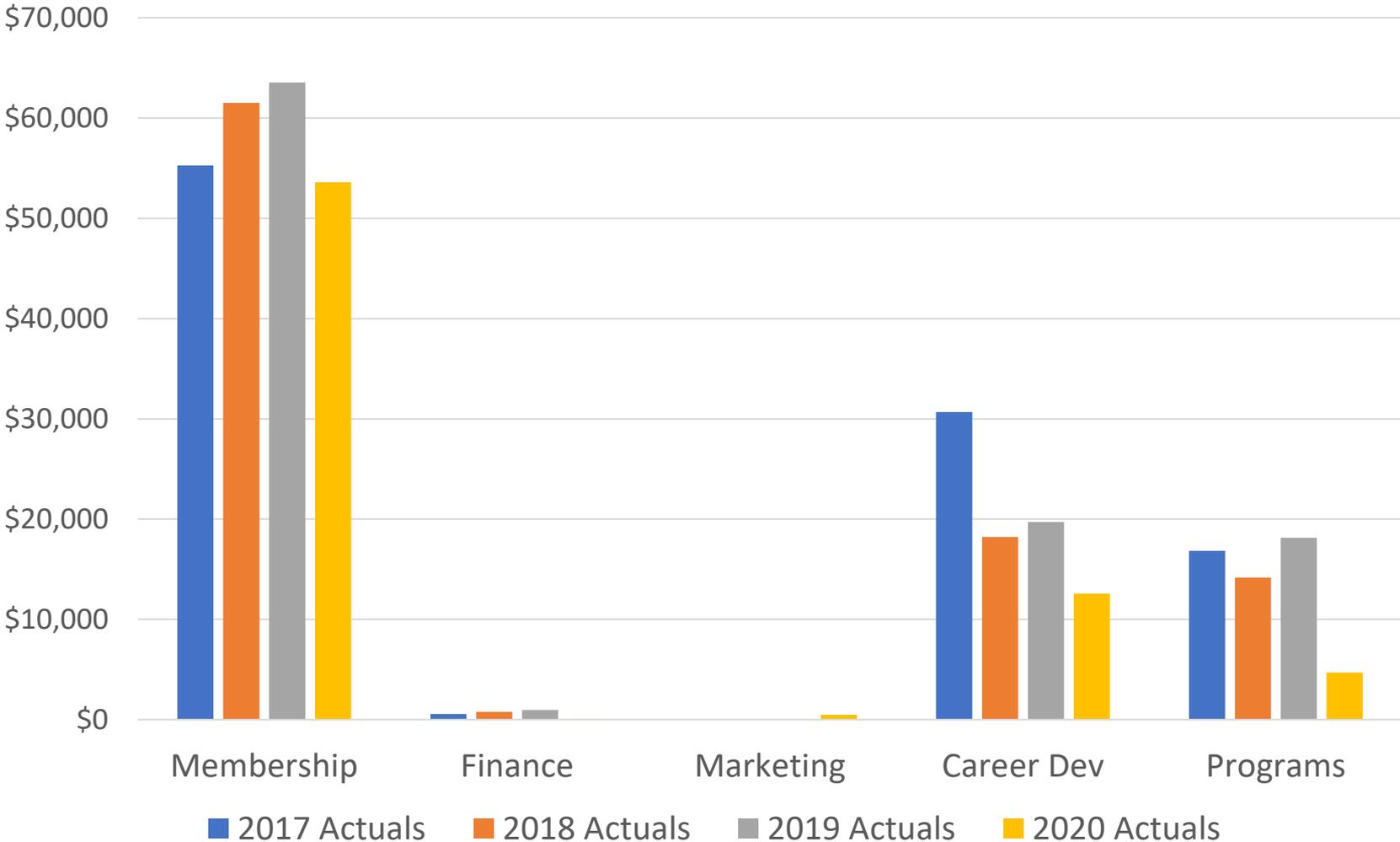
# 3 year P&L Trends



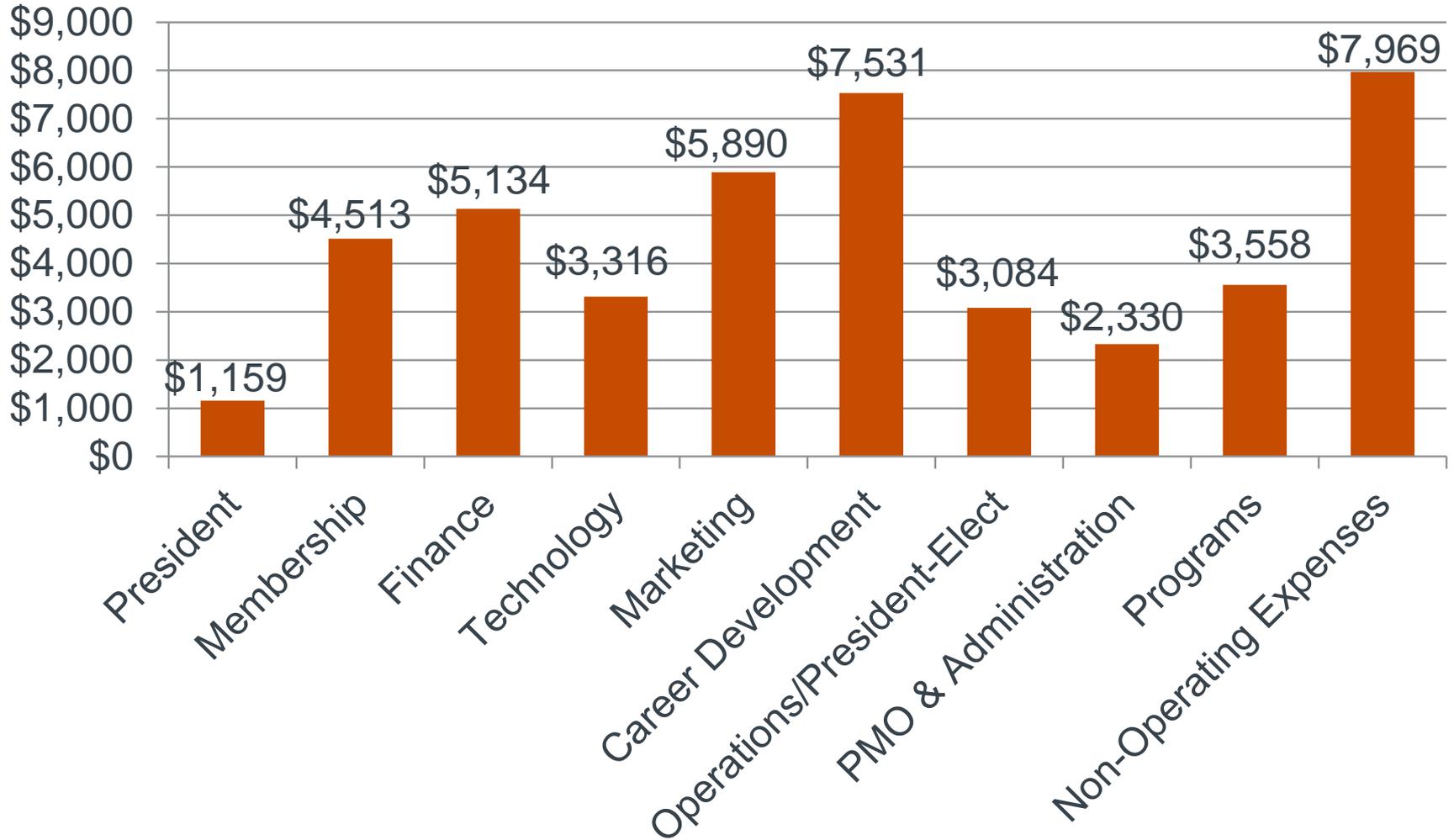
# 2020 Revenue



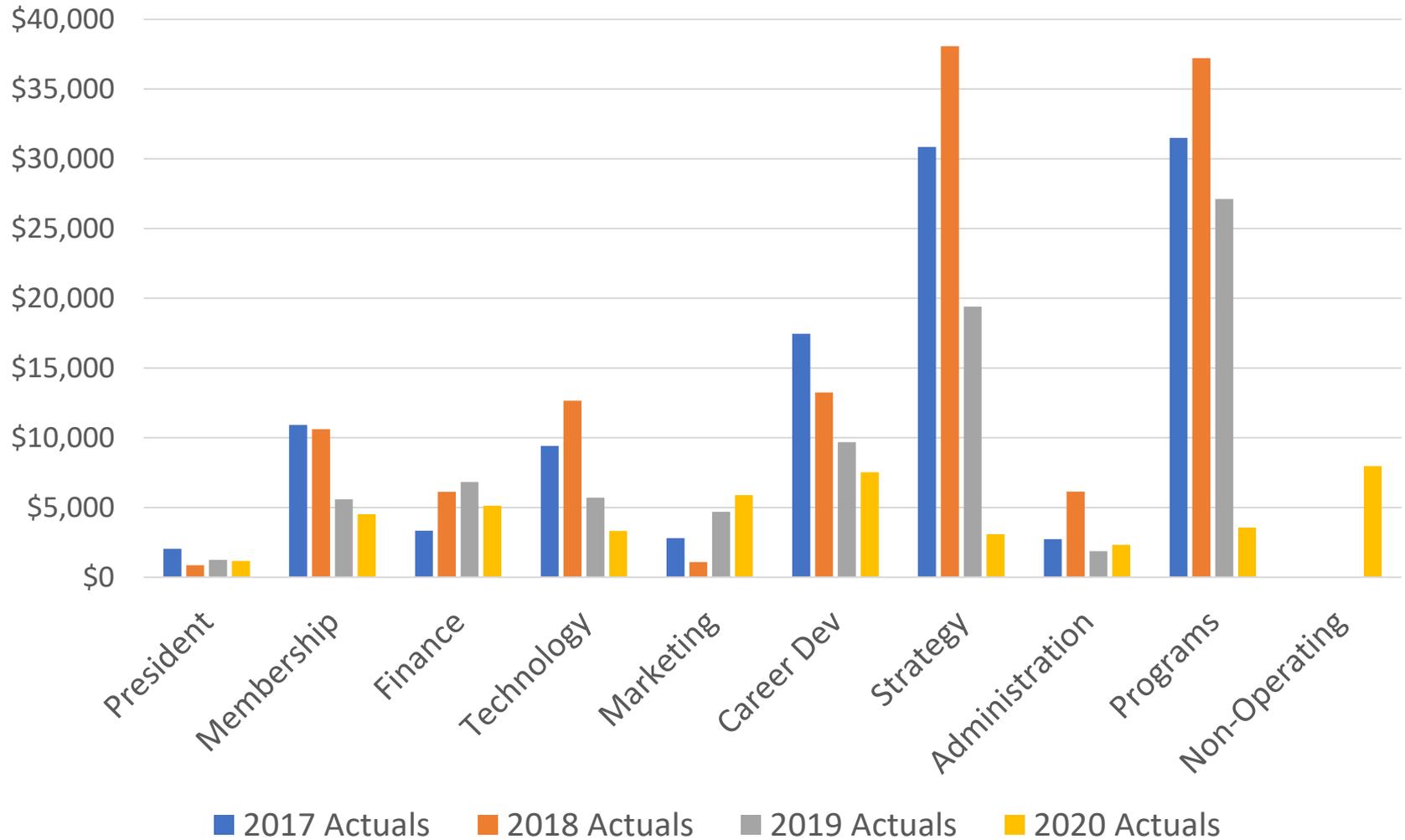
# Revenue Trends by Portfolio



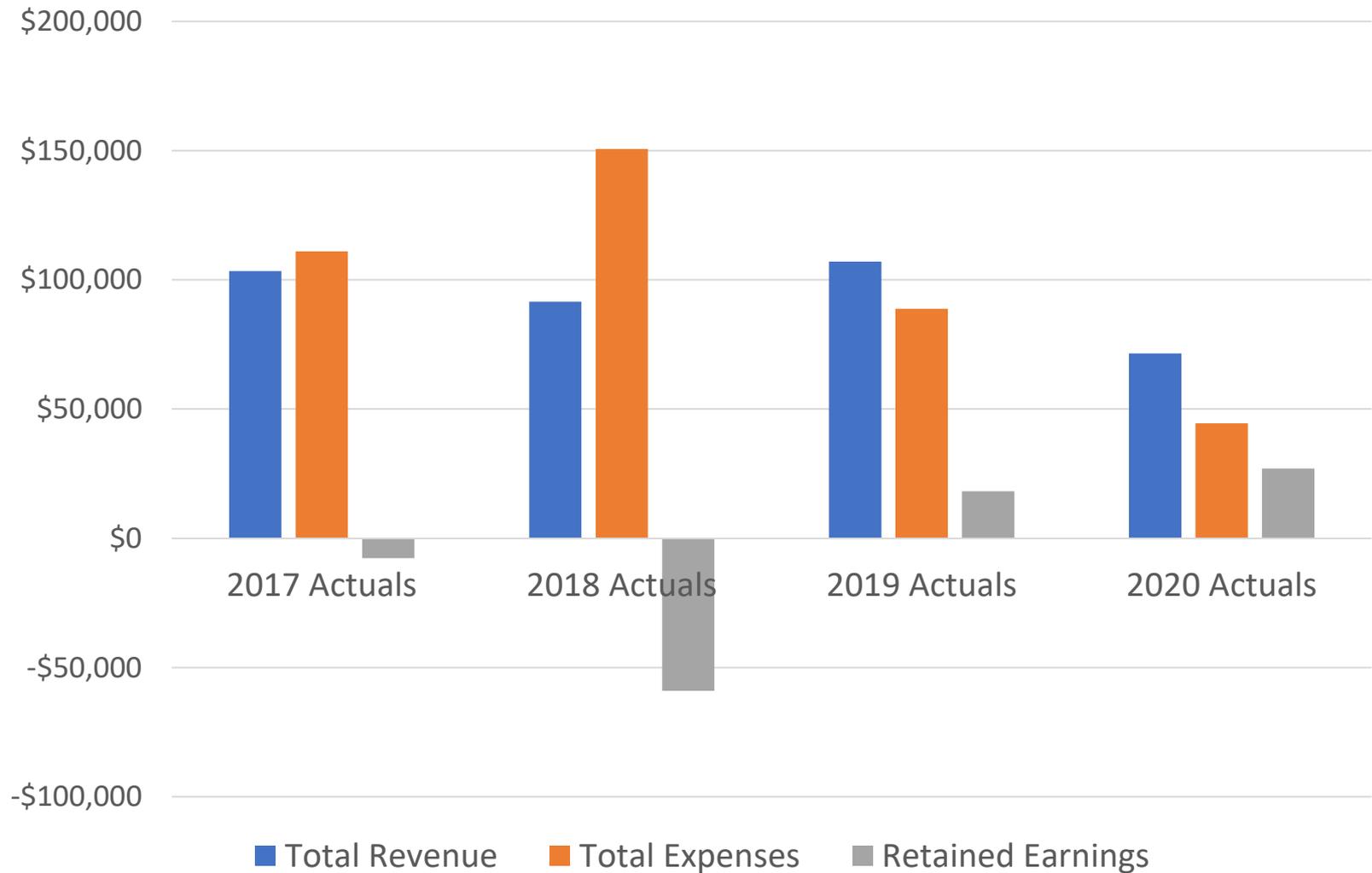
# 2020 Expenses



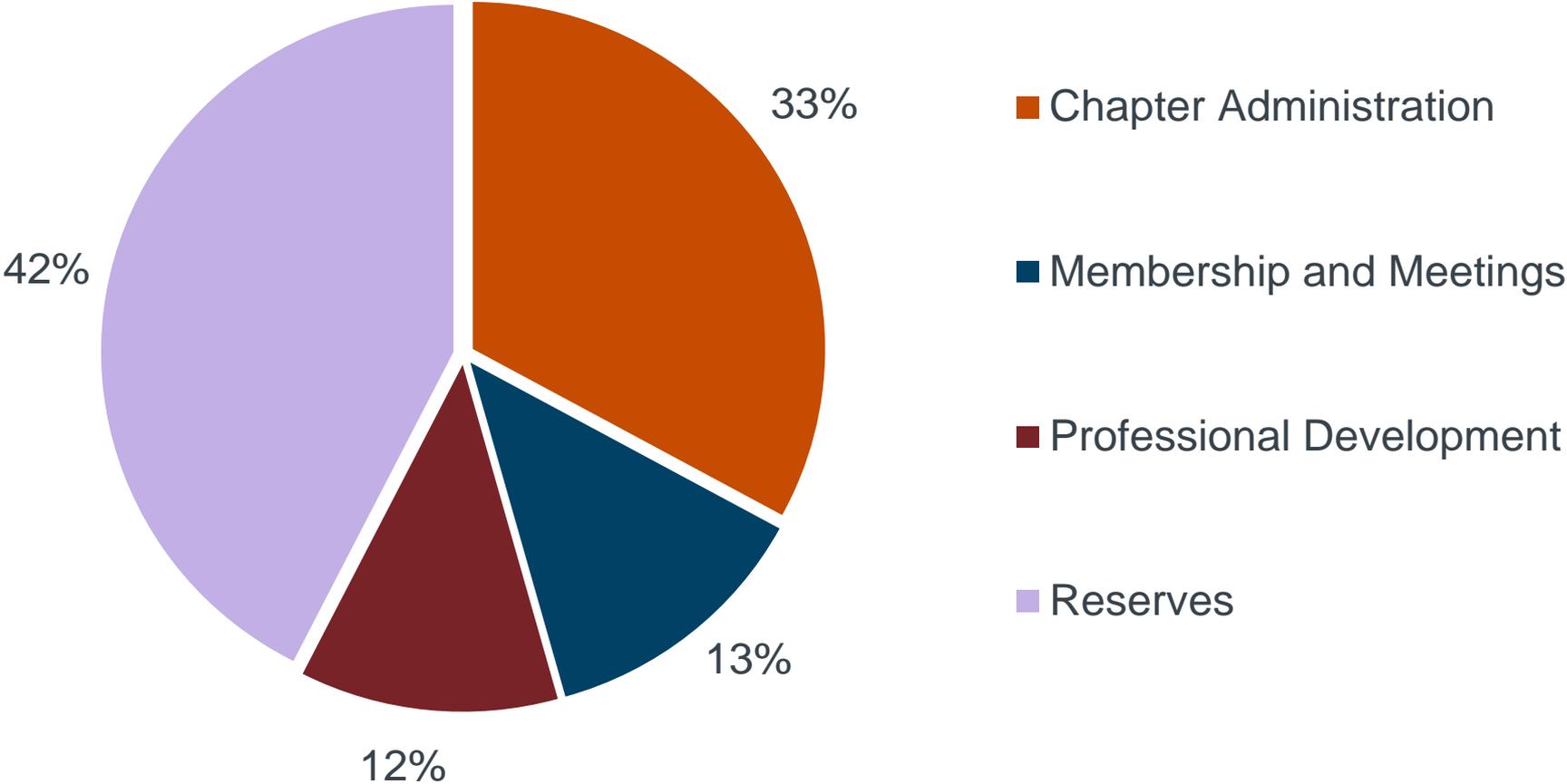
# Expense by Portfolio



# Chapter Financial Trends



# Where Your Dues Go

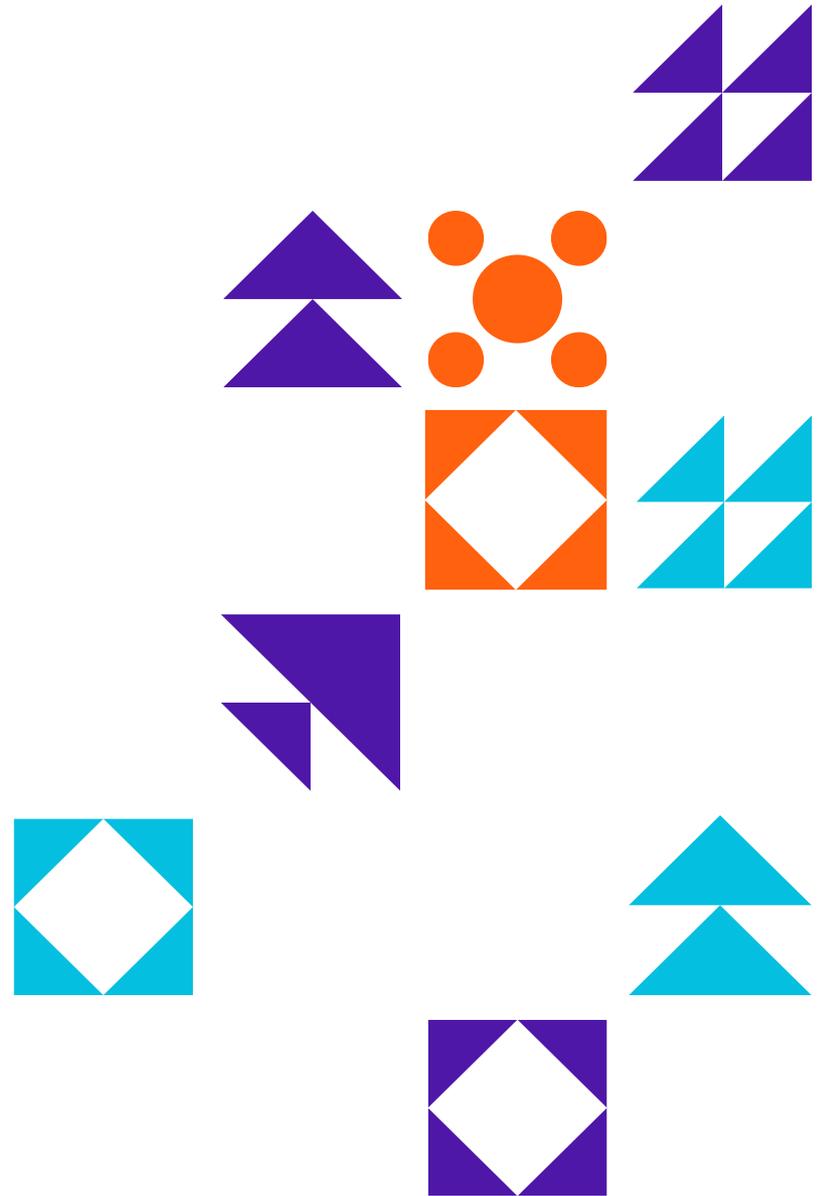




# What's new for 2021?

January 14, 2021

Presented by Svetlana Averbukh, President and the 2021 Board



# 2021 Vision

## President, Svetlana

- Maintain the PMI-LA Chapter benefits
- Continue membership retention and attract young people to the chapter
- Increase Member engagement via interesting and stimulating programs and educational activities
- Collaborate with other chapters
- Attract more Chapter Volunteers and train new volunteers for Leadership positions

# VP of Operations/President-Elect – OPEN

- Partner with the President to Establish the 2021 Platform
- Priority focus: Support Leadership development

# Vp of Finance - Meredith

## Responsibility:

Maintain and strengthen PMI-LA financial health

## 2021 Priorities

- Develop desktop procedures
- Report PMI-LA finances monthly to BoD
- Prepare a successor
- Set the stage for an independent financial review

# VP of Technology - Syreeta

- Recruiting for Technology Team – build the team out to a minimum of 3 members
- Recognition page for New Members, Newly Certified Members, Awards Recipients, in addition to streamlining the Lee Mandley Volunteer of the Month postings
- Implementation of Change Committee to oversee changes to the website

# VP of PMO & Admin - Charles

- Operational maintenance of chapter.
- Assist Tech to facilitate Programs and Marketing initiatives.
- Asset Management
  - Further management and control of physical inventory.
  - Streamline, make use and preserve chapter's digital assets.

# VP of Marketing & Communications - Deby

- Google Analytics Review of current new processes compared with 2 years ago
- SEO: Search Engine Optimization
- Work on fully automating New Members email campaign
- Work with Membership on implementing a Renewal Campaign
- Continue to increase Social Media Presence
- “Return from COVID-19” Celebration!

# VP of Career Development - James

- Career Employment events throughout the year
- Implement new Job Board

# VP of Programs - Kimberly

## Chapter Meetings

- Continue with ZOOM meetings through June 2021
- Transition into in-person meetings 3<sup>rd</sup> and 4<sup>th</sup> quarter
- Identify new Flagship location

## Chapter Programs

- Identify key opportunities to partner with other Chapters
- Develop Tedx and Networking opportunities to drive member engagement
- Recruit Tier 1 Speakers
  - Top Leaders from Fortune 100 Companies
  - Social Media Influencers

# VP of Membership – Eric

- Planned 2021 Events
  - Volunteer Recruitment
  - New Member Orientation
  - Chapter Networking Event 1

# Q&A for Members

Based on the information you just received about the chapter, please enter in the CHAT anything that you would like to see this year that would “engage” you as a member?