



LOS ANGELES CHAPTER

Chapter Business Summary 2018

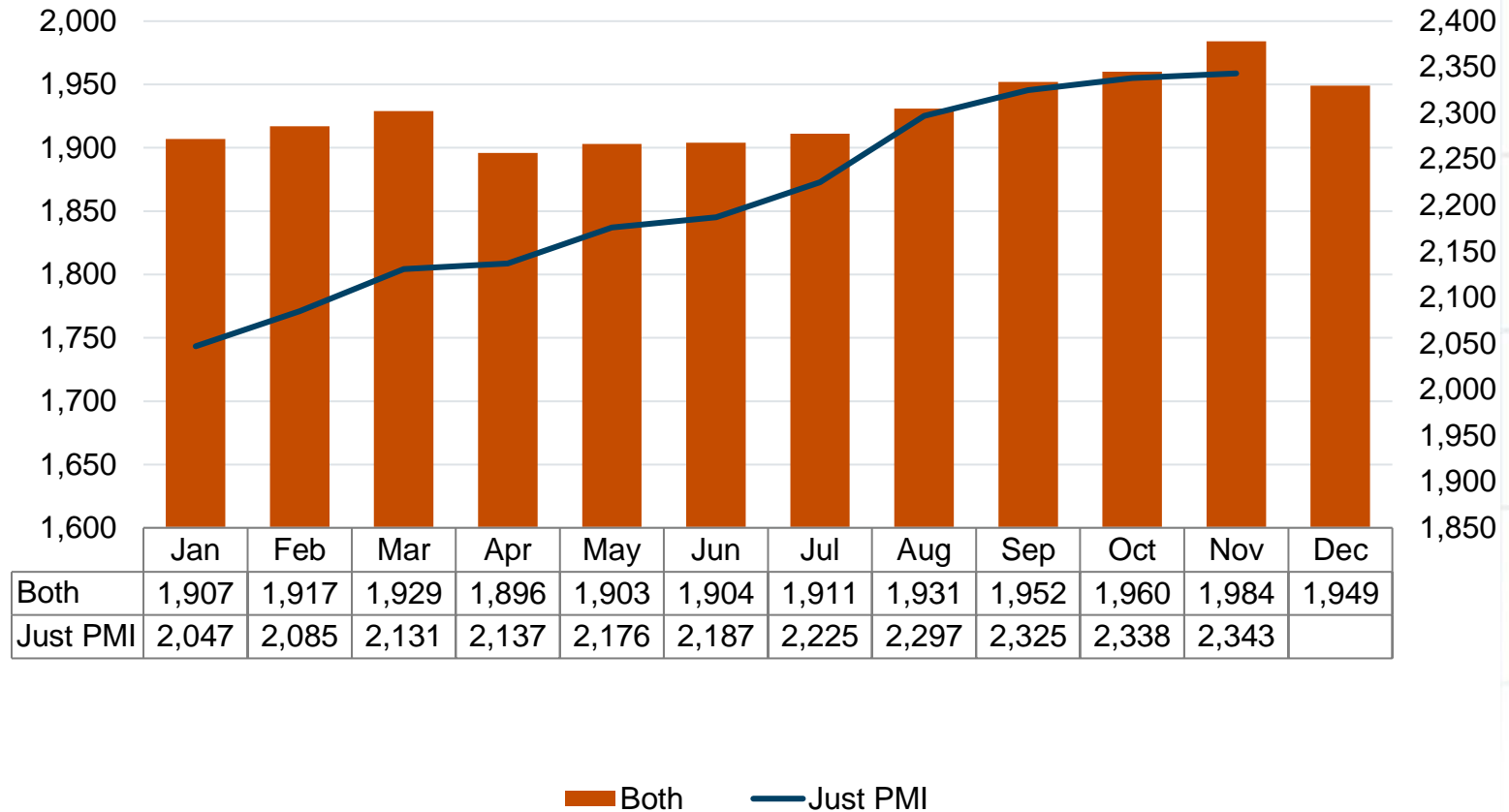
Presented by Eduardo Henriquez, Past President

Inside and Outside Our Chapter

ENGAGEMENT

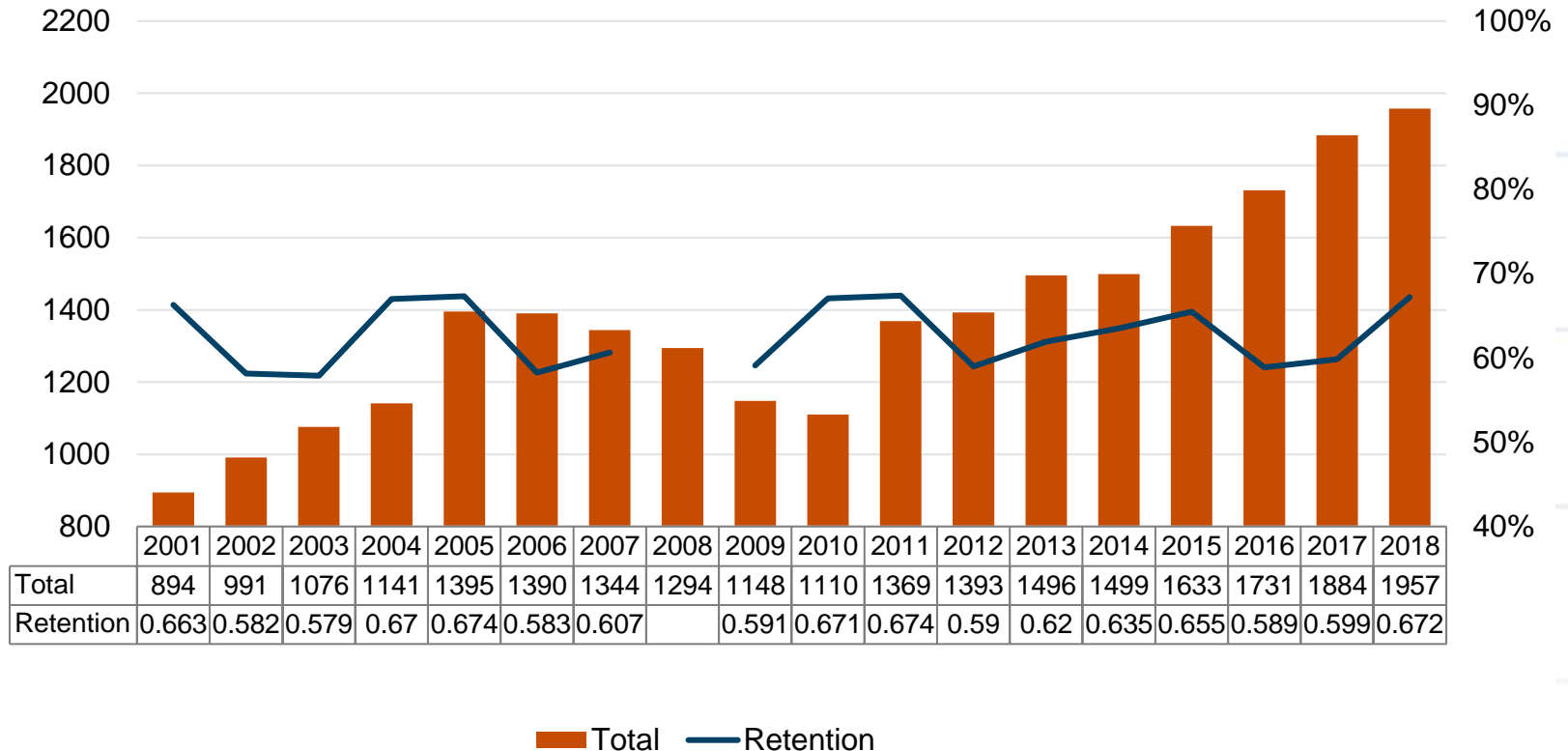
2017 Membership Numbers

Members in LA of the Chapter and PMI

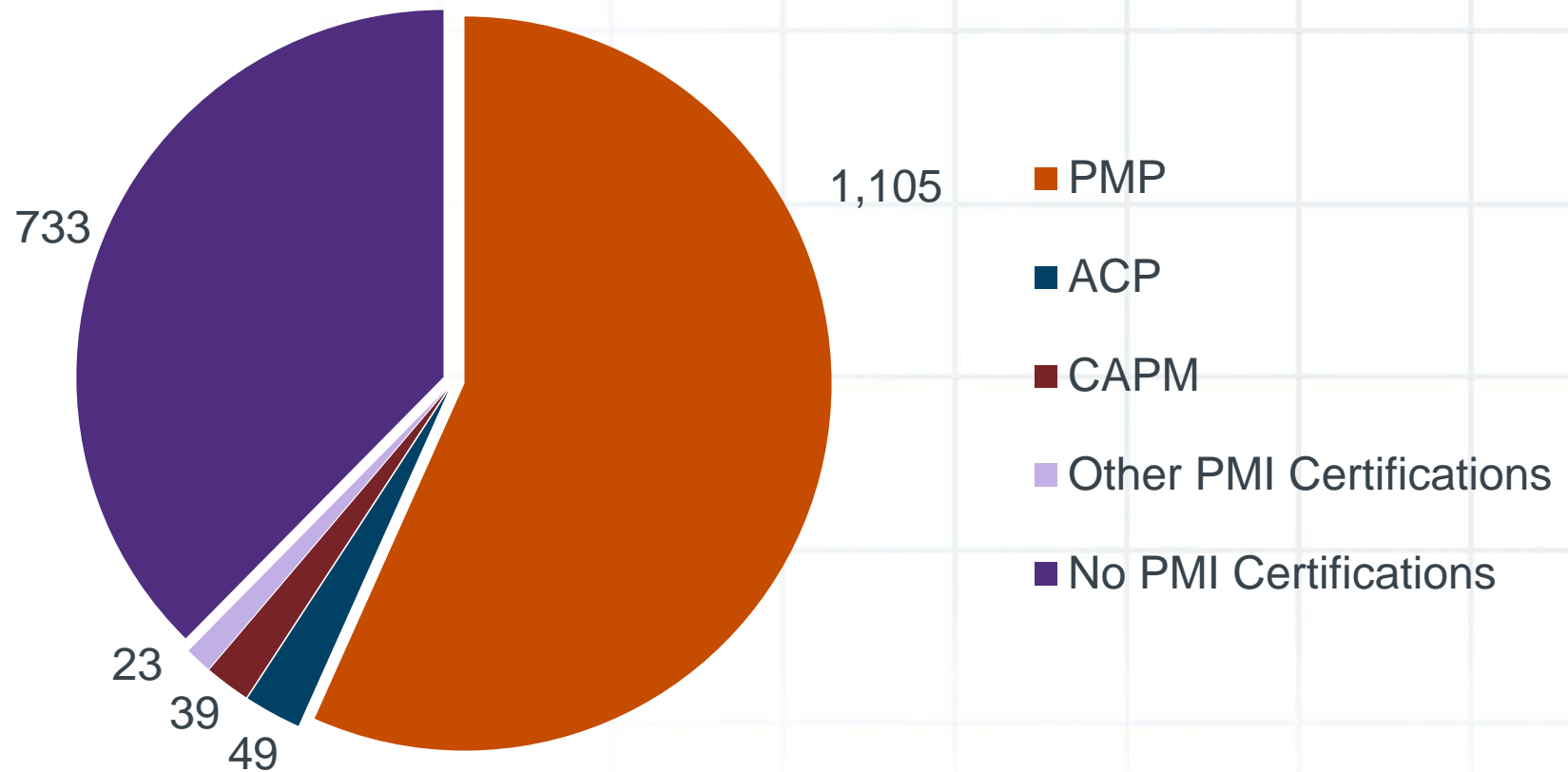


Historical Membership Numbers

Total Members and Retention Rate



End of Year Membership Certifications



Programs Registration

Program	Meetings	Total	Average
Culver City	10	374	37
Downtown Breakfast	4	281	70*
North Los Angeles	6	140	23
San Fernando Valley	4	182	46*
South Bay	4	143	36*
Live Webinar	4	239	60
Next Gen Leadership Workshop	1	17	17
	32	1376	
Pasadena	12	Registration	
Book Club	8	Not Required	

* Free Events, so attendance is different from Registrations

Professional Development Events

Professional Development	# of Offerings	Total Attendees	Average
Intensive PMP Prep Bootcamp	5	19	4
Online PMP Prep Bootcamp	1	2	2
Full Day PM Workshops	2	49	25
Half Day PM Workshops	2	27	14
CSM Certification Training	1	4	4
MS Project Certification Training	1	15	15
YEP Workshop	1	18	18
Transitions Meetings	7	156	22
	20	290	

Membership Event Registrations

Program	Members Registered	Non-Members Registered	Total Attending
Hacienda Heights Mixer	16	20	38
North LA Mixer	19	2	21
PDU & a Pint	78	31	82
Long Beach Mixer	21	2	29
Volunteer EOY Event	55	N/A	50
Picnic in the Park	31	10	41

Partner Organizations

PARSONS

we work®



Health Services
LOS ANGELES COUNTY



**PEPPERDINE
UNIVERSITY**

DeVry 
University

2018 Snapshot and 2016-18 Trends

FINANCIAL

Financial Overview

(Numbers are still being finalized)

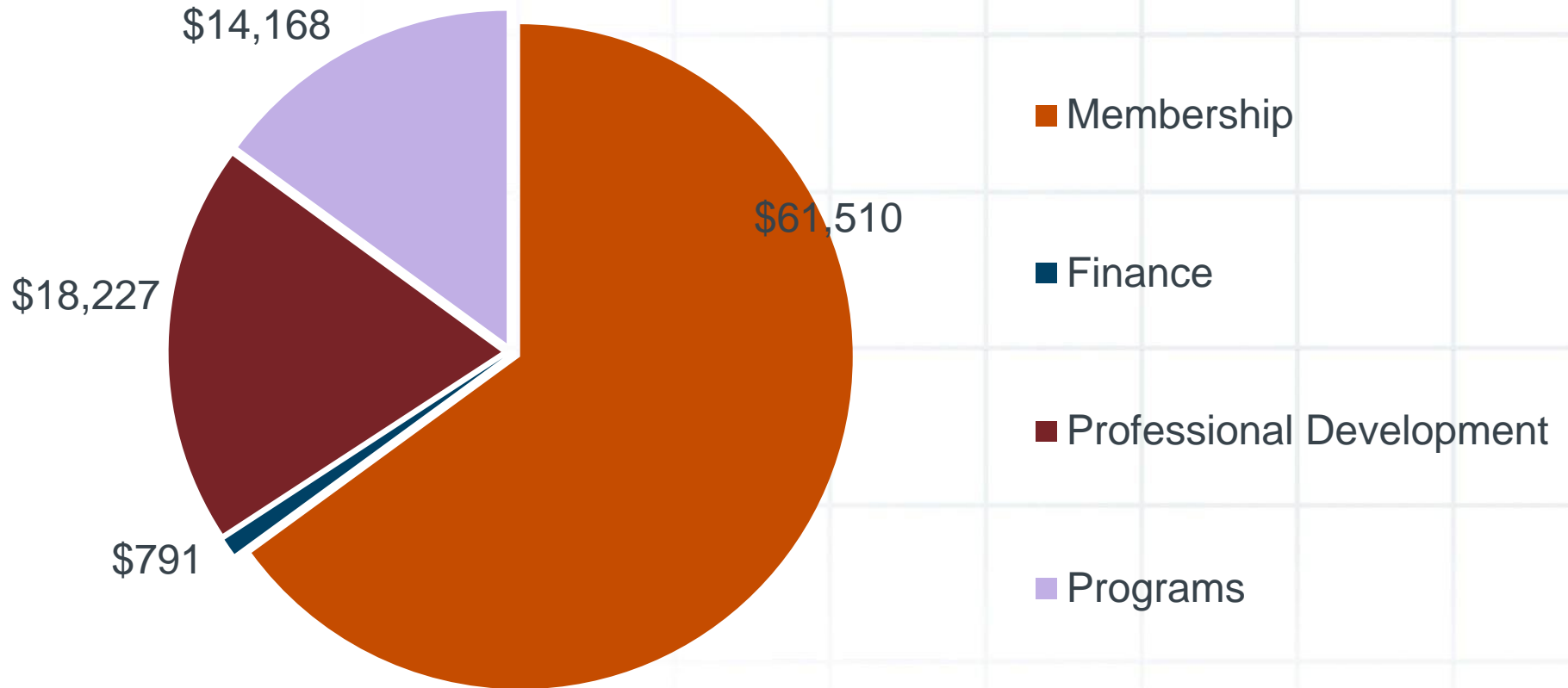
	2017 Actuals	2018 Budget	2018 Actuals	Variance
Total Chapter Revenue	103,349	160,120	94,696	65,424
Total Chapter Expenses	111,035	184,232	125,986	58,246
Chapter Net	-\$7,686	-\$24,112	-\$31,290	7,178

Current Assets as of Dec. 31, 2018	
Checking Account	\$184,989
Investment Account	149,665
CD's	68,496
PayPal	4301
Cash	100
	\$407,551

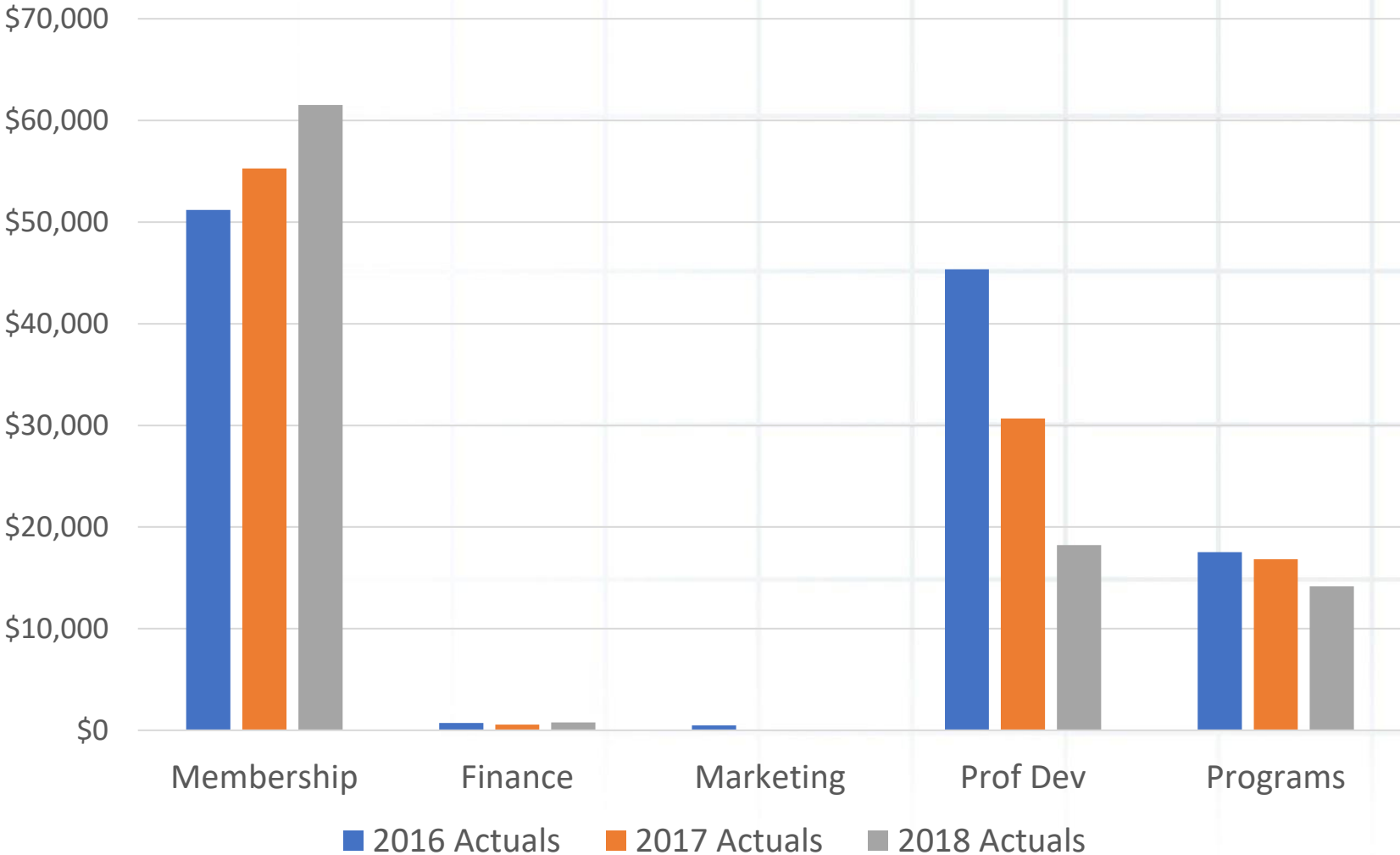
Reserves Ratio	
Assets	407551
Expenses	125986
	3.23

Surplus Capital	

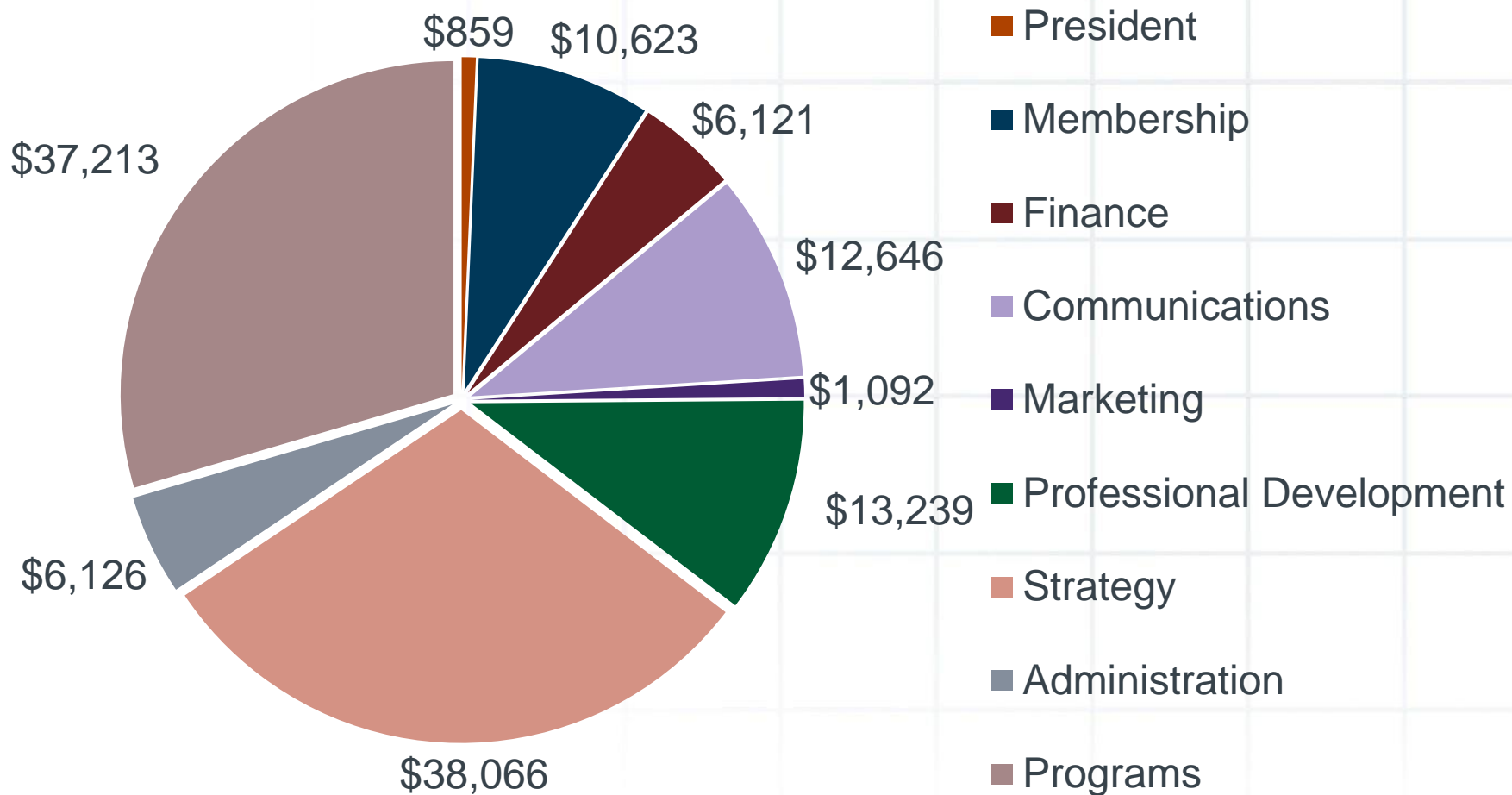
2018 Revenue



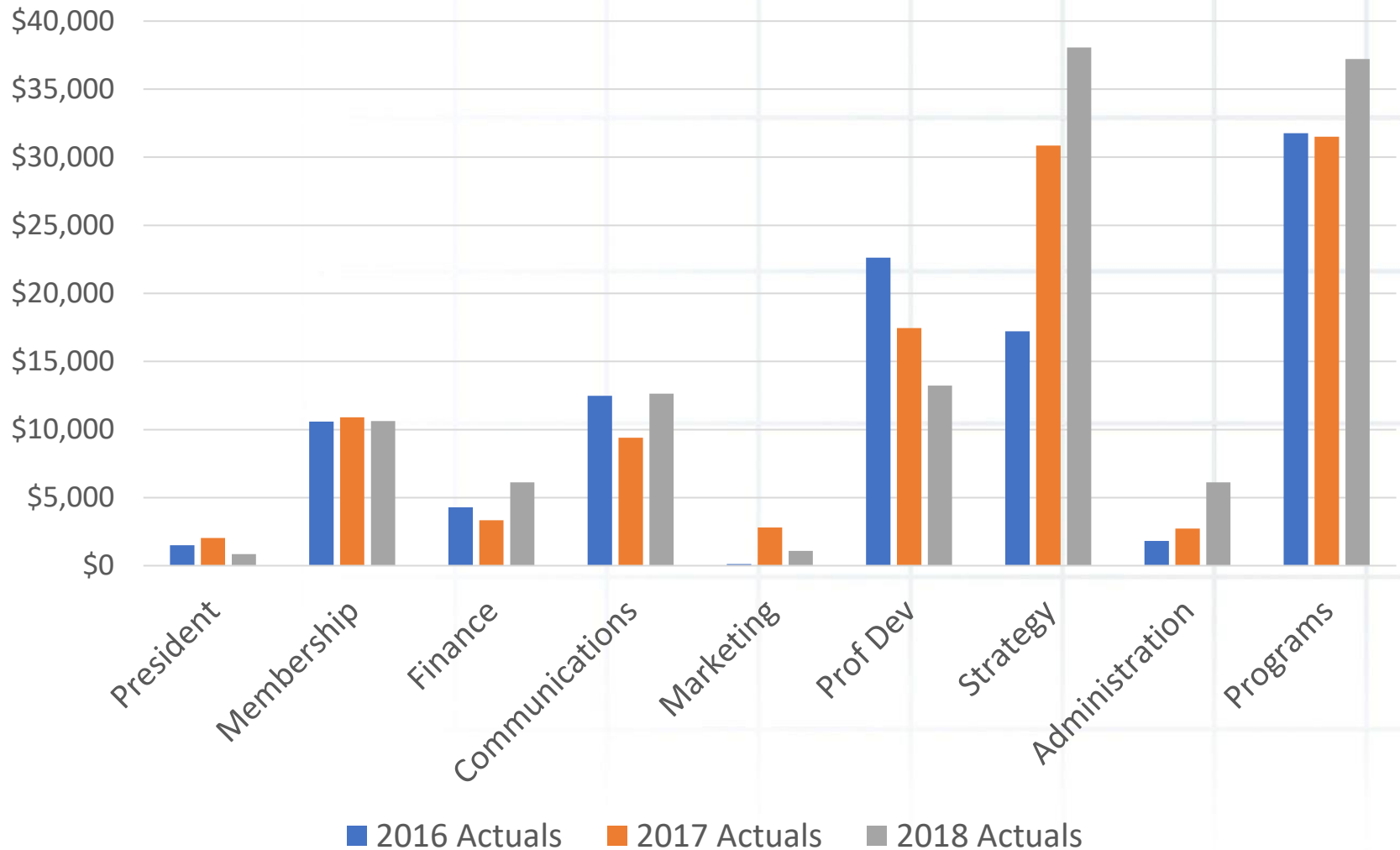
Revenue Trends by Portfolio



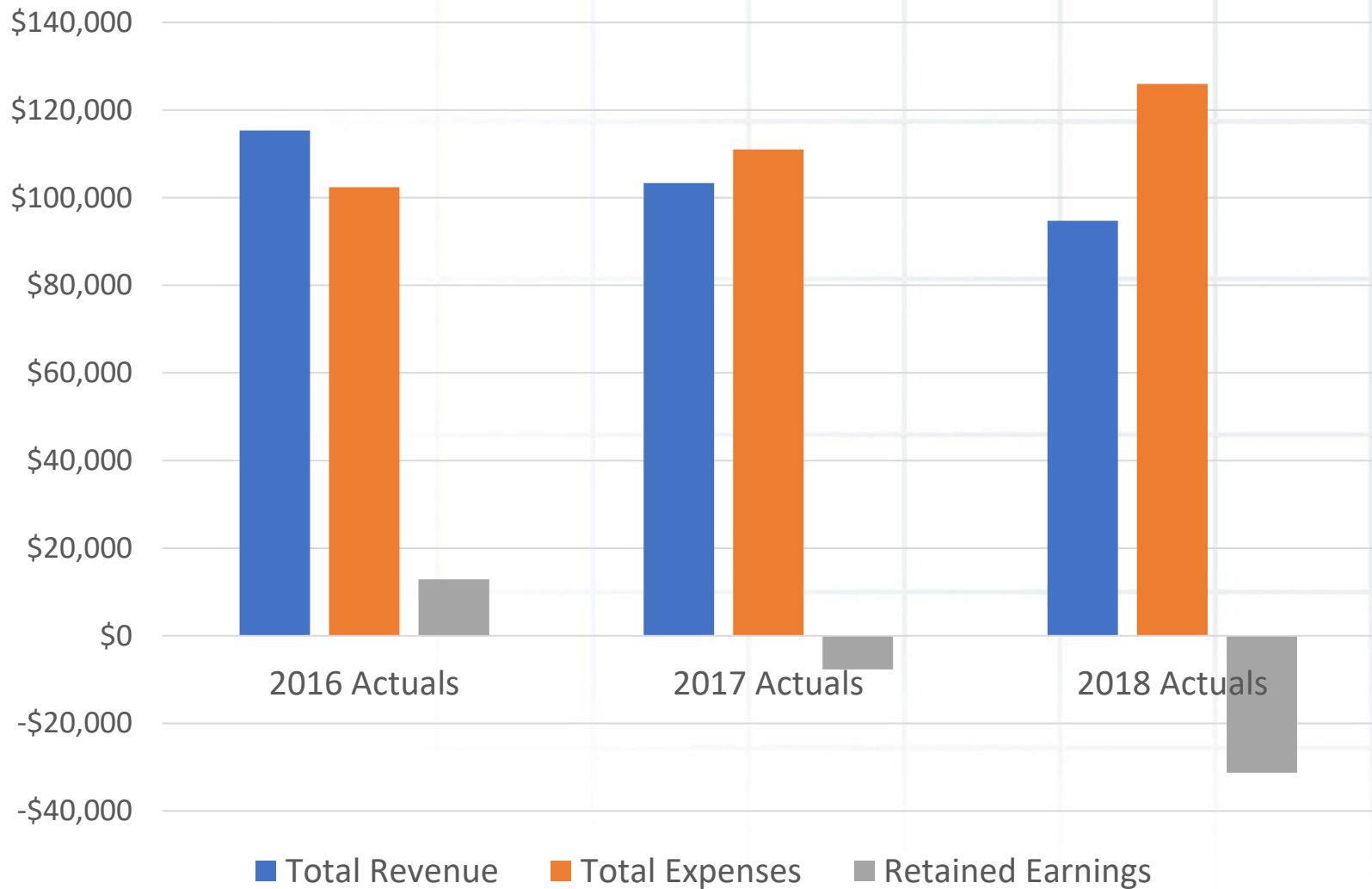
2018 Expenses



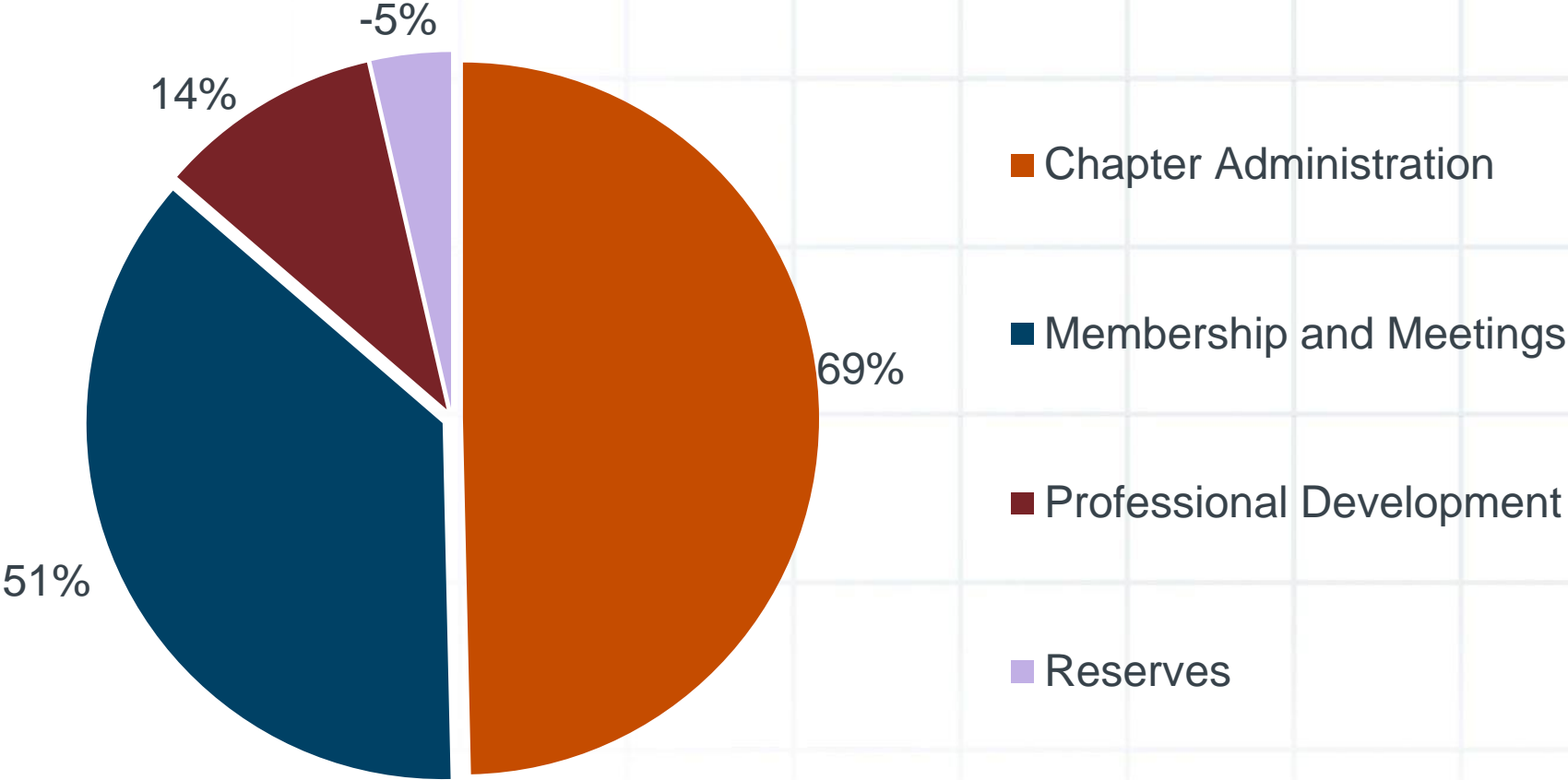
Expense by Portfolio



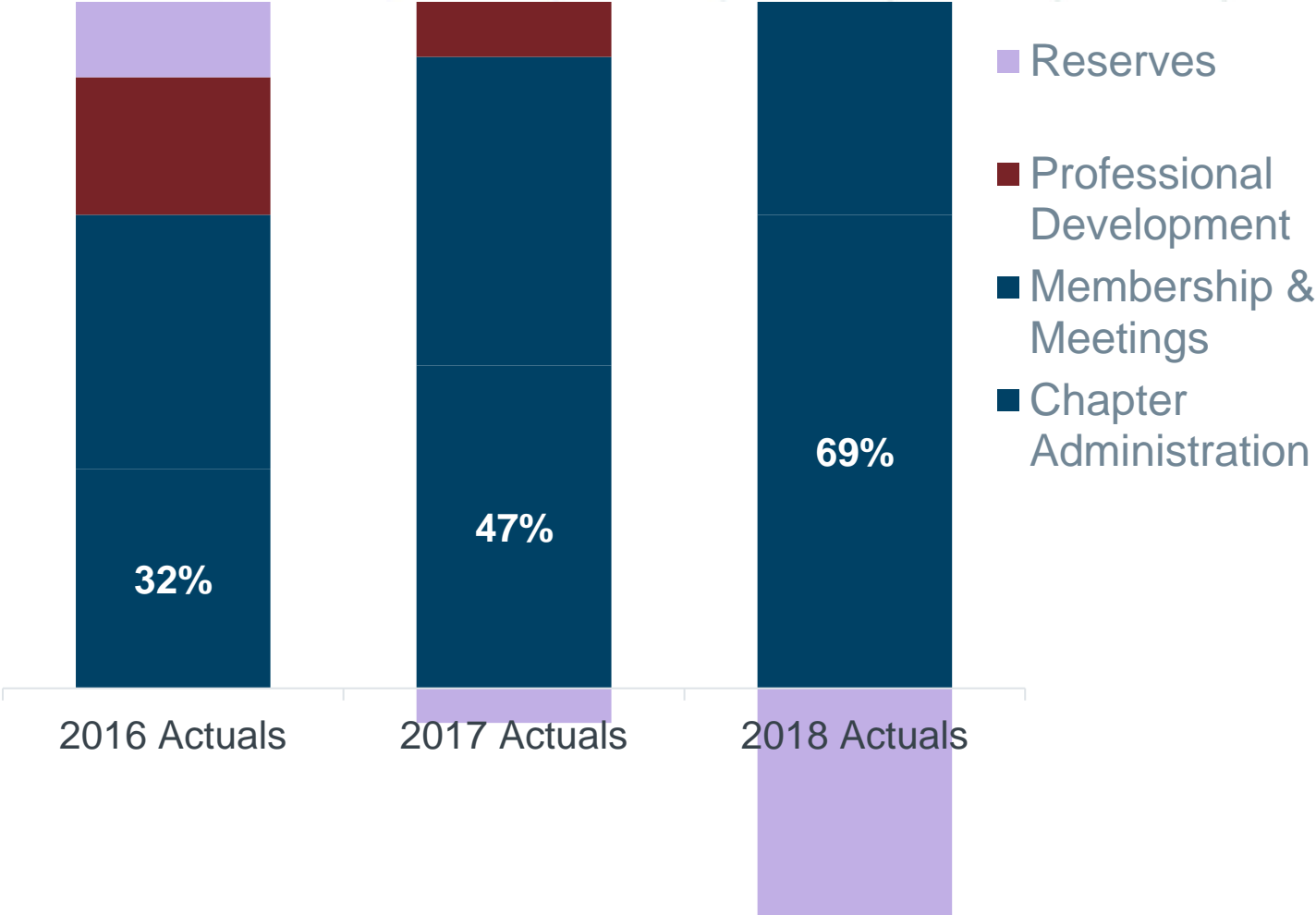
Chapter Financial Trends



Where Your Dues Go



Where Your Dues Go







What's new for 2019?

Presented by Parash Sharma, President

2019 Vision & Goals

1. Increase Membership Retention & Engagement
2. Increase Rewards to Promote PM Culture
3. Better Volunteer Management
4. Ways to Increase Sponsorship
5. Recruiters Management

Chapter Leadership Meetings

1. Board Meetings 4th Wednesday of every month (BoD, Trustees)
2. Status Meeting 2nd Wednesday of every month (BoD, Trustees, Key Volunteers as needed)
3. July Strategy Meeting
4. Incoming Board Planning Meeting (2-day)
5. December Strategic Direction Meeting
6. Full Transparency of Minutes

Financial Expectations of Chapter Leadership

1. Expense reports Turned in within 2-4 weeks of event (no exceptions)
2. Dashboard produced by Finance Committee monthly
3. Cognizant Financial responsibility to sustain chapter
4. Full Transparency on budget

VP of Strategy and Administration – Candidate Solicitation

- The requirements have been posted to the website
- Please apply if you are eligible and interested to serve on the board to run the chapter
- The board will review and appoint the most eligible candidate

Communications/Technology Initiatives:

- By-laws change from Communications to VP of Technology
- take us to a data driven organization – all data consolidated into 1 location (O365/SharePoint)
- Use technology to make the entire chapter more streamlined
- Get more information from various input streams -
- Event check-in thru technology
- Open to CWS change – but needs more research
- O365 – Move it on track to get visibility to tools as soon as possible (critical)

Finance Initiatives

Board:

- Approve 2019 Annual Budget - #1 priority
- Operate the chapter at a sustainable rate
- Review & update Finance policies
- Review & update current reserves

Members & Volunteers:

- Streamline expense submission and reimbursement process
- Analyze Zoho accounts for usage - add / remove users as necessary; train new users

Marketing & Outreach Initiatives

- Targeted Marketing – aligned with Website
- Social Media Strategy – teasers, promos, contests
- Ownership of Scrolling Presentation
- Marketing Campaigns on all Events
- Ownership of the Website Refresh (with Comms/Tech)

- Outreach: Academic – 1 school with engaged NextGen Leader/YEP team to run events at their school

- Outreach: Military – military events (Fleet week, special months programs, career transition guide)

Membership Initiatives

- New Member Initiatives:
 - welcome letter – is it still happening? Updated?
 - Video orientation
- “Fun day” – Does not have to be a picnic, can be any activity – open to Suggestions ... Movie Idea
- Volunteer Initiatives:
 - Volunteer Recruitment – change to a Volunteer Orientation & Engagement Event – Early Feb time-frame
 - Lee Mandley Volunteer of the Month – shared across all venues – honored at their location & LinkedIn Recommendation
 - Streamlined Volunteer on-boarding & EOY celebration
- Networking Events:
 - Quarterly Networking Events
 - Shared Events with PMI-OC/PMI-IE

Professional Development Initiatives

- Increase revenue to 10% over last year
- Offer a variety of courses on Certifications & non-PMI Certifications (MS Project, Primavera, Jira, Agile, CSM, ITIL etc.)
- Focus efforts on 3 PDUs – half day advance topics (interactive workshops)
- Focus efforts on 6 PDUs – mini conference with more than 3 speakers; includes Certification Training and Techniques & Tools
- Delivery Methods – On-site now – Virtual or Hybrid offerings

Programs Initiatives

- Revitalize the Flagship:
 - Maximize space at Marriott – use empty space if we do not have sponsor
 - Set it up carnival style – walk around the area
 - Focus on Networking ideas – dedicated Networking volunteer
 - Move to Pepperdine – misunderstood their construction issues – stay with Marriott Q1
- All Meetings:
 - Ask for more engagement with Speaker (exercises)
 - Ask Attendees to post on social media (via Hashtags)
 - Suggest Speakers from various places – maybe different types (some non-pdu)

Strategy Initiatives

- Restricting the PMO Initiatives to cross functional activities:
 - Quality over quantity – More engaged members, not more members, better community/satellite meetings, more efficient meetings
 - PMO “over watches” all Initiative projects
- Cultural Change – “well oiled machine”
 - Put approvals closer to task executors
 - Improve and perfect what we are doing now.
 - Embrace new ways to communicate
- A Shared Consolidated Calendar!
 - Visibility to all events and internal meetings for planning and volunteer balances
- Power BI and MS Project Tools for Analysis
- Better BoD-Trustee-Key Volunteer relationships

Q&A for Members

Based on the Networking Game and the information you just received about the chapter, each table should compile a list of things that they would like to see this year that would “engage” you as a member?

Please be sure to turn in your table lists to one of the Board Members before leaving today.

**Thank you for being part of this amazing
community, PMI Los Angeles!**

Happy New Year!