



Strategic Planning For Chapter Success

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October 7, 2010

Agenda

Overview

Pre-planning

Preparing for the strategic planning day

Example

Lessons Learned

Overview

1. Gathering input for Strategic Planning occurs all year long
2. Think of your strategic plan as the High-level Integrated Master Plan for your chapter for the next 1-3 years – not shelf-ware
3. Tracking Progress against the strategic plan occurs throughout the year.

Pre-planning occurs throughout the year...

1. Gather tactical member input through meeting feedback forms (what kinds of meetings they want)
2. Gather strategic member input through annual membership survey (how beneficial different actual and proposed services are to them)
3. Gather input from volunteers through volunteer socials (what volunteers want from us)
4. Gather input from corporate sponsors and potential sponsors through quarterly corporate round-tables (what local companies want)

Preparing for the Strategic Planning day

1. Collect all input gathered throughout the year
2. Revise / Update our SWOT (via action item at a board meeting)
3. Collect input from the local chamber of commerce – What is happening in our local community?
4. Collect input from PMI-Global – what is happening with the Project Management Profession nationally and internationally?
5. Invite existing and new board plus directors and volunteers.

Preparing for the Strategic Planning day – Homework...

- Updated Strategic Planning Deck sent to board members, newly elected board members, and participating directors and volunteers several weeks before the planning event to review – objective: to generate ideas for what we can do next year – inputs to next year’s strategic plan.
- NEXT.....example slides from this year’s planning event



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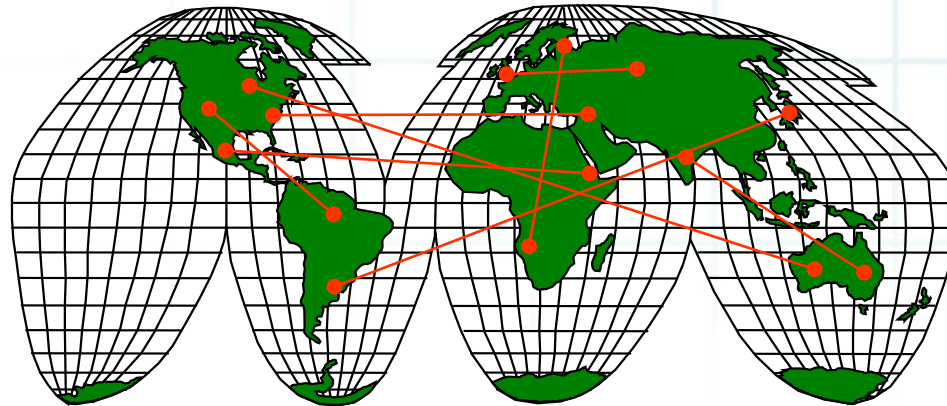
PMI-NAC Strategic Planning Day

November 21, 2009

Current State – PMI Global Vision / Mission / Goals

PMI's Envisioned Goal
(10 - 30 years in the future)

*Worldwide, organizations will embrace,
value, and utilize project management and
attribute their success to it.*



PMI - NAC

Vision / Mission / Goals

Vision Statement:

“Organizations in North Alabama embrace, value, and utilize Project Management and attribute their success to it.”

Mission Statement:

“To enhance the Project Management knowledge and skills of project management practitioners in North Alabama such that they and their employers consider these skills indispensable to the execution of their company strategies and business success.”

Value Proposition:

*Serve as a credible resource and innovator for Project Management knowledge, training, trends and practices in North Alabama.
Develop partnerships & strategic alliances with North Alabama organizations for the successful practice of Project Management.
Lead the evolution of the project management profession and the maturity of its practice in North Alabama*

PMI - NAC

Long-Term Strategic Objectives

PMI-NAC Long Term Strategic Objectives

1. Become recognized as the premier provider / authority of project management knowledge, skills, and advocate for the effective application and use of those skills to achieve organizational strategic objectives
2. Provide a means for members to improve their project management knowledge and skills
3. Initiate and institutionalize mechanisms for sharing of resource skills and knowledge among project management practitioners
4. Create an environment for support, networking, and mentoring among project management professionals
5. Work with local organizations and academia to advance the understanding and acceptance of project management
6. Establish relationships with similar groups to share ideas
7. Serve as the example / image of successful project management in order to promote the project management profession
8. Implement sound organizational policies, procedures, processes, and tools to support the rapid growth of the chapter and position it to operate more efficiently and effectively in the future.

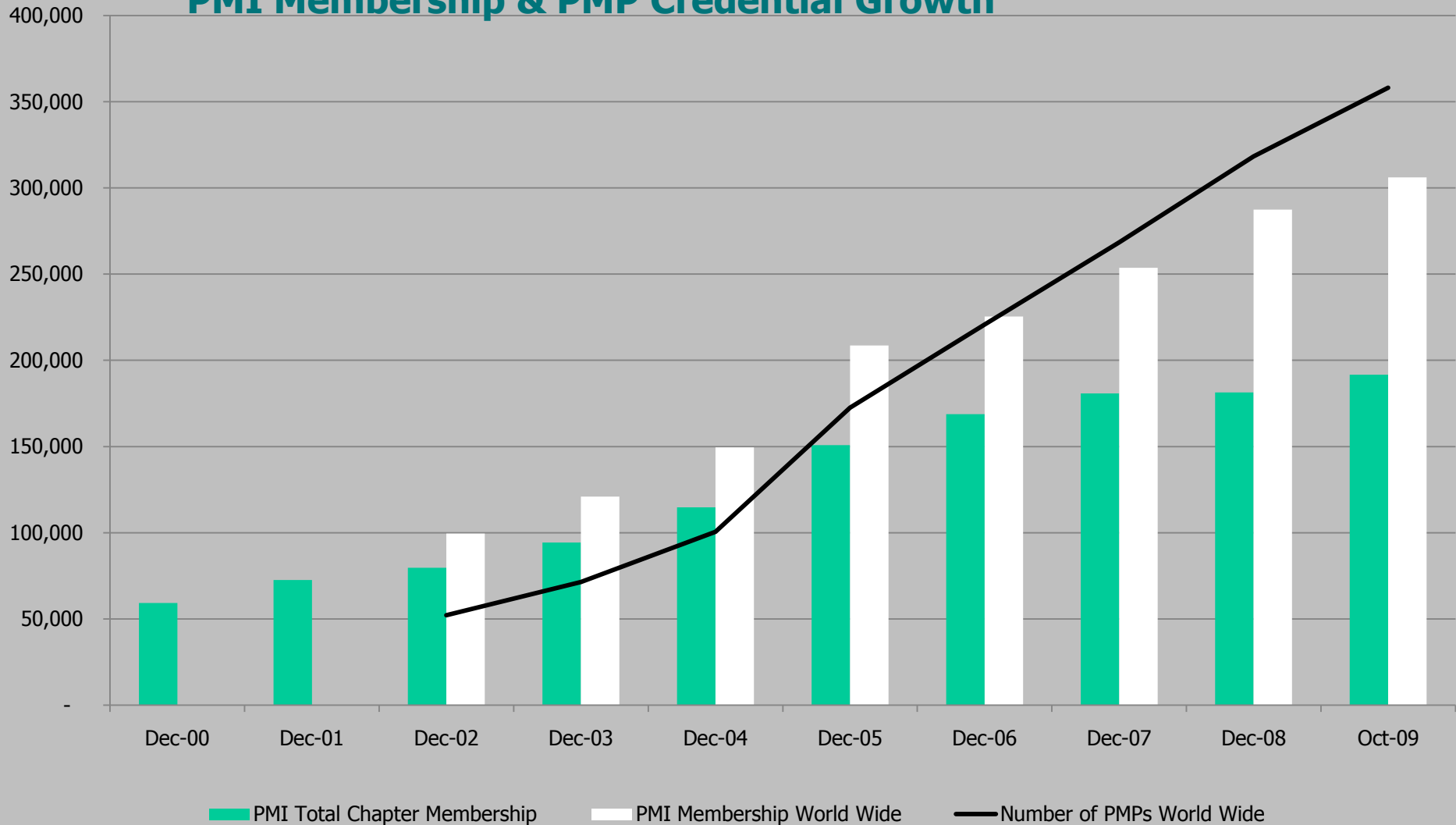
Value to Members*

Reason to Join	Reason to Renew	Reason to Leave
Value		
<ul style="list-style-type: none">▪ Recognition▪ Knowledge▪ Certification (Discount)▪ Advance Profession▪ Networking	<ul style="list-style-type: none">▪ Knowledge▪ Recognition▪ Networking	<ul style="list-style-type: none">▪ Dues burden shifts to member▪ Certification achieved (or not)▪ English not primary language▪ Join but not engaged in PMI

*2005 PMI member survey.

PMI Total Membership in Chapters

PMI Membership & PMP Credential Growth



Current State – Environment

Local Employers

2000

1.	U.S. Army/Redstone Arsenal	11,383
2.	SCI Systems	6,000
3.	Huntsville Hospital System	4,300
4.	Intergraph Corporation	3,000
5.	DaimlerChrysler Corporation	3,000
6.	Huntsville City Schools	3,000
7.	NASA/Marshall Space Flight Center	2,656
8.	The Boeing Company	2,400
9.	City of Huntsville	2,000
10.	Madison County Schools	1,871
11.	Dunlop Tire Corporation	1,650
12.	Teledyne Brown Engineering	1,460
13.	UAH	1,100
14.	ADTRAN	1,400
15.	Madison County	1,064
16.	Computer Sciences Corporation	900
17.	Benchmark Electronics	974
18.	Lockheed Martin	870
19.	Cinram International	800
20.	Crestwood Medical Center	670

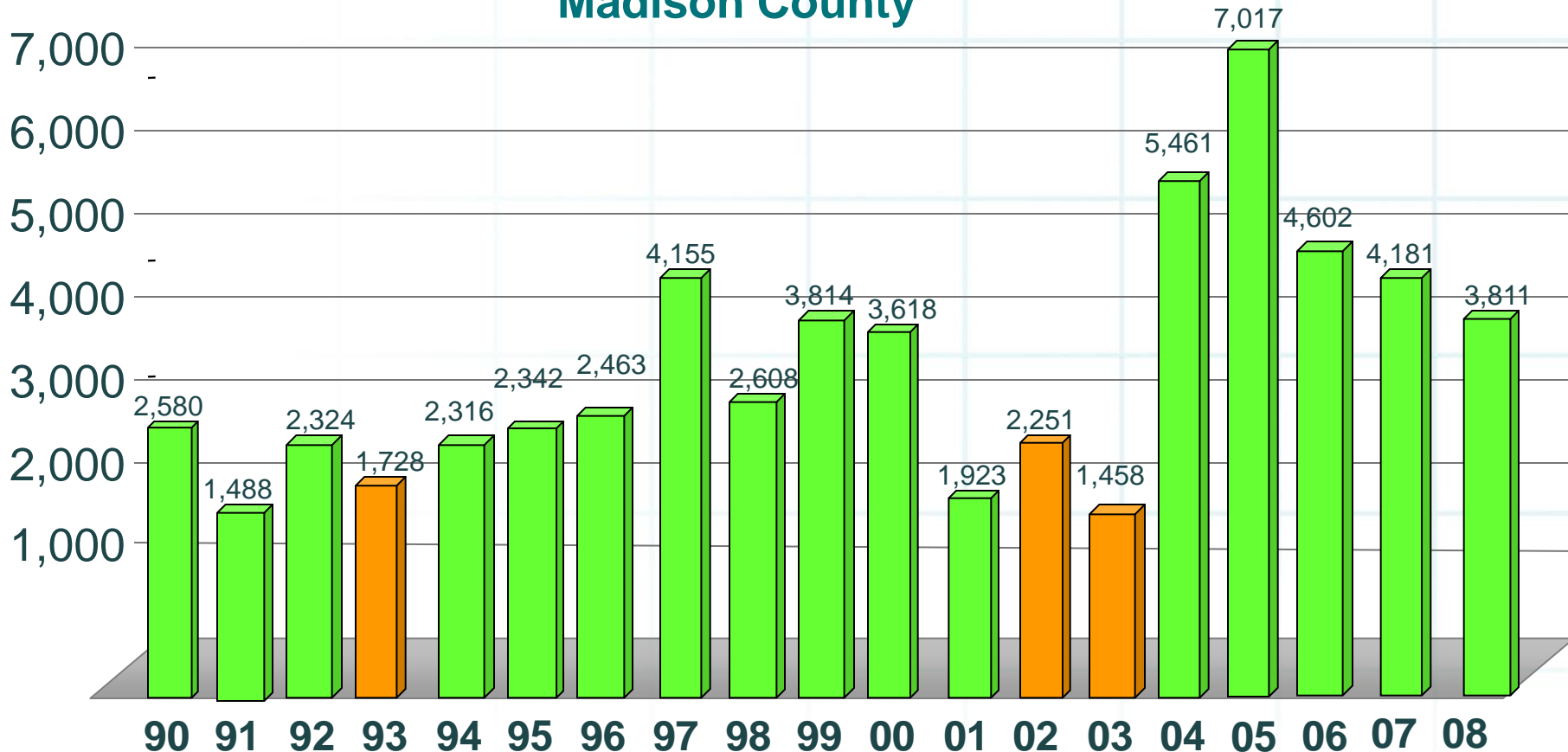
2009

1.	U.S. Army/Redstone Arsenal	25,373
2.	NASA/Marshall Space Flight Center	7,177
3.	Huntsville Hospital System	5,126
4.	The Boeing Company	3,200
5.	Huntsville City Schools	3,000
6.	Cinram International	2,861
7.	Sanmina-SCI	2,500
8.	Intergraph Corporation	2,450
9.	City of Huntsville	2,199
10.	Madison County Schools	2,150
11.	SAIC	1,716
12.	ADTRAN	1,700
13.	Continental AG	1,700
14.	Teledyne Brown Engineering	1,424
15.	UAH	1,318
16.	Verizon Wireless	1,300
17.	Madison County	1,220
18.	Benchmark Electronics	1,200
19.	Northrop Grumman	1,125
20.	Alabama A&M	1,092

Current State – Environment

Announced New & Expanding Jobs

Madison County

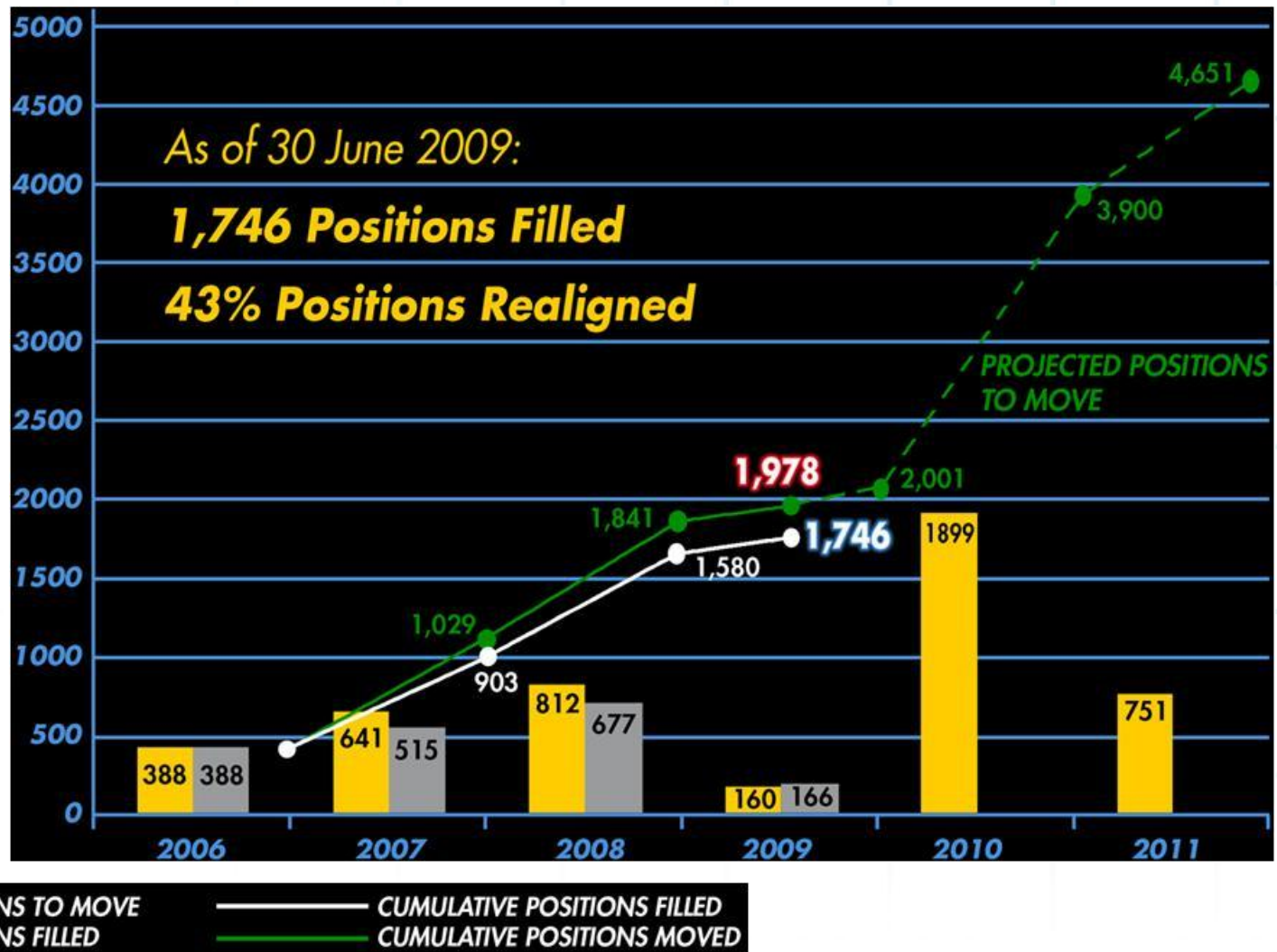


State Rank: ■ 1st ■ 2nd

Source: Alabama Development Office

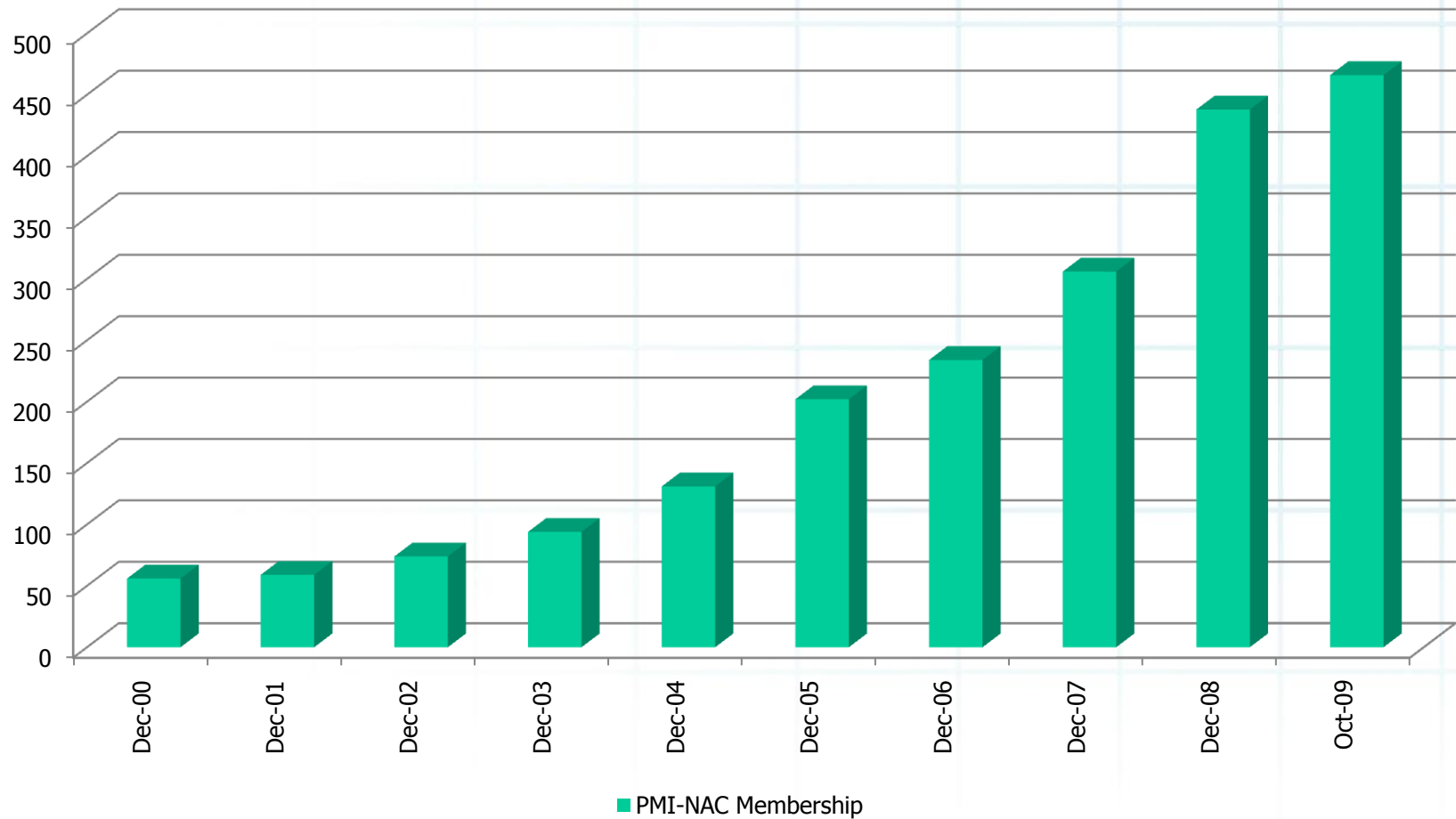
BRAC Implementation

Flow of Personnel to Redstone



PMI-NAC Membership

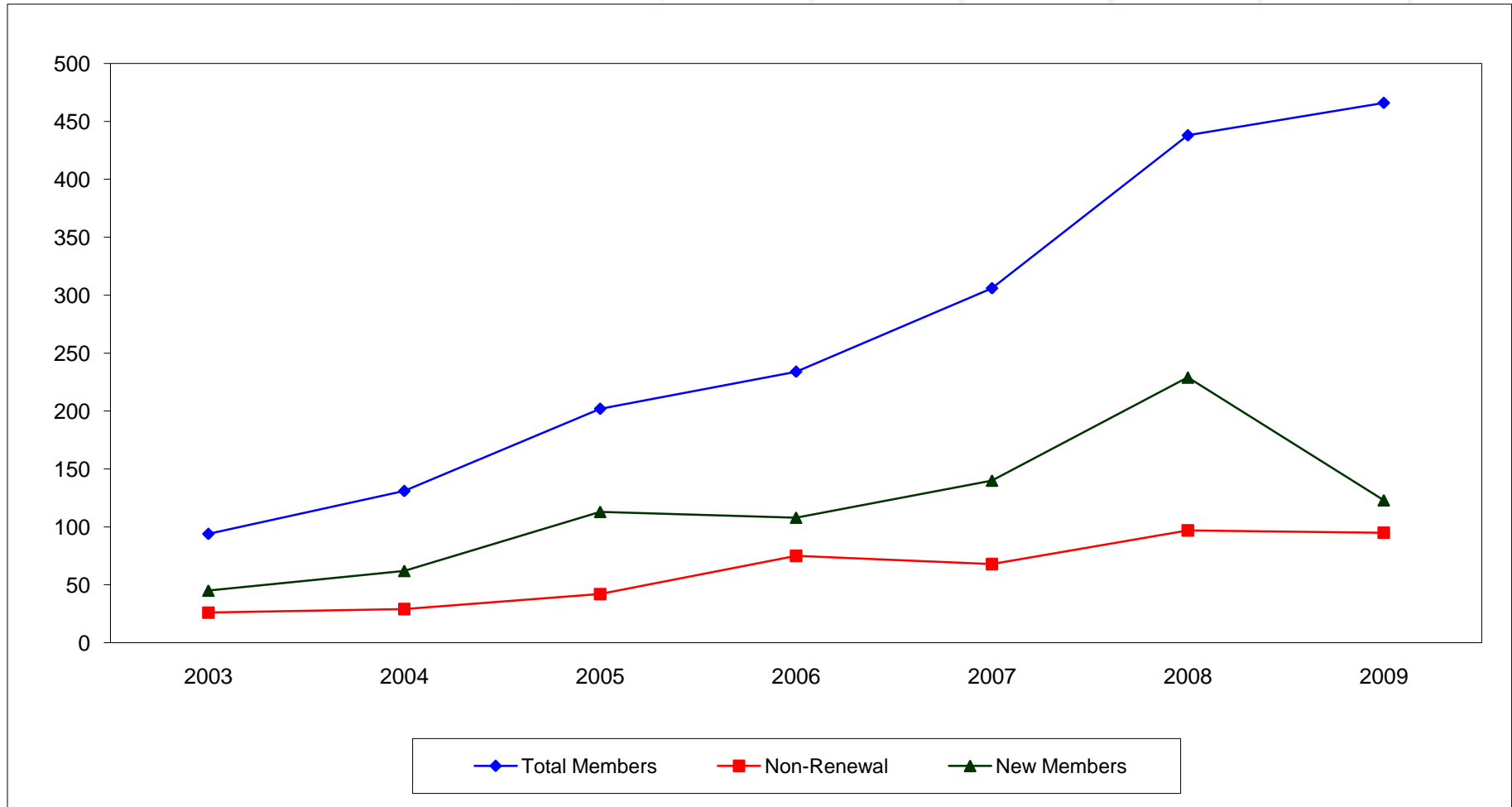
PMI-NAC Membership



Source www.pmi.org

Current State – Chapter Growth Statistics

PMI-NAC Growth, new members and non-renewals



**2009
Membership
data -
Membership
length**

Number of Years	Count	% of membership
Less than 1	145	33%
1 year	123	28%
2 years	55	13%
3 years	39	9%
4 years	29	7%
5 years	20	5%
6-9 years	12	3%
10-14 years	6	1%
> 15 years	5	1%
Total	434	

Major employers of our members

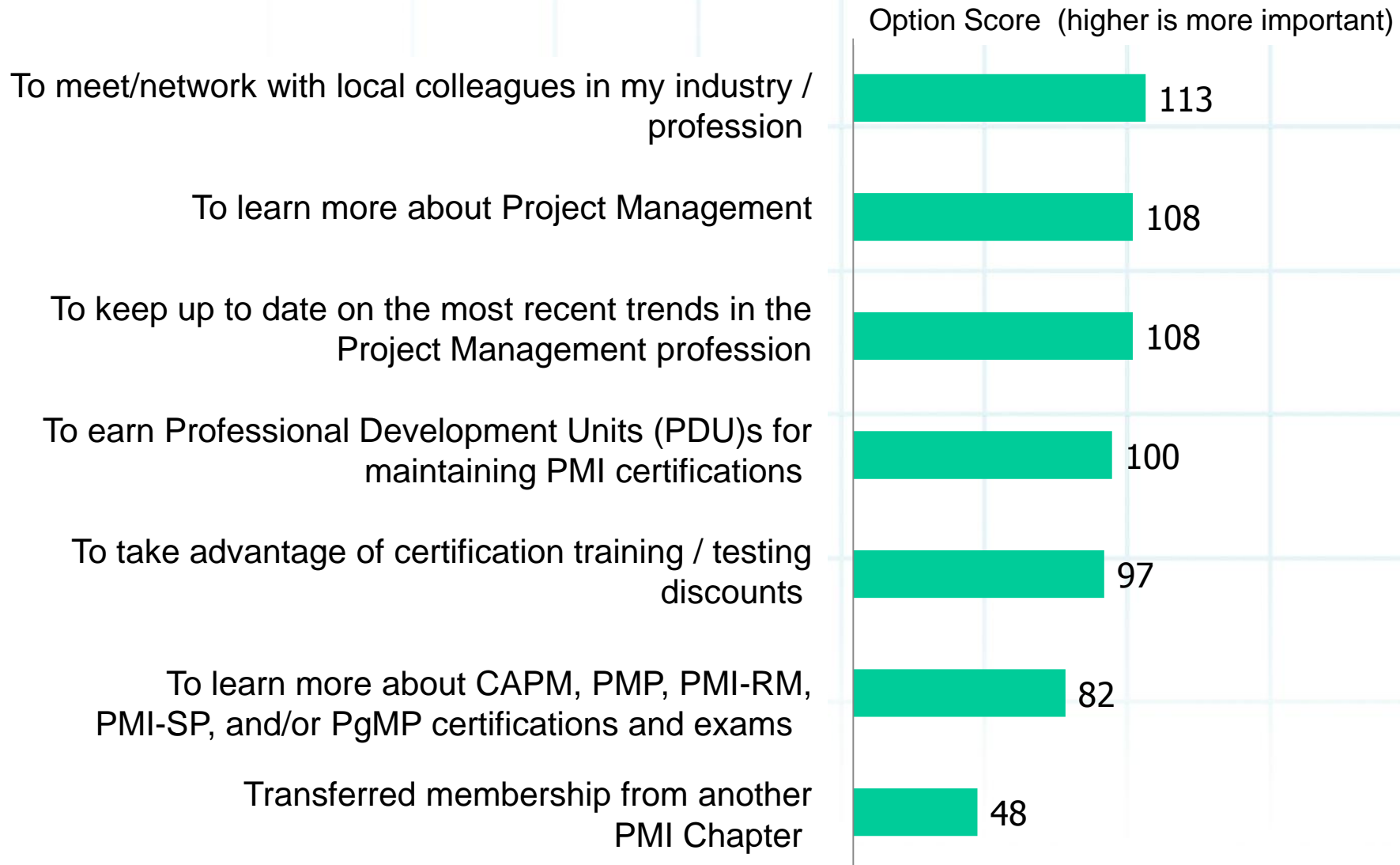
Company	number of members
SAIC	30
Booz Allen Hamilton	27
Northrop Grumman	24
DRS-TEM	14
Continental Automotive	14
Intergraph	14
IBM	9
NASA	9
US Army	9
Boeing	8
3001 Inc	7
Siemens	7
Us Core of Engineers	7
Advanced Systems Development	6
BAE	6

Programs – Summary feedback statistics

Programs Summary	2008	2009
Number of Meetings (YTD)	12	14
PDUs offered	46	23
Average meeting attendance:	48	60
Meeting attendance as % of membership:	13.7	14%
Average Percent Satisfied:	85%	84%

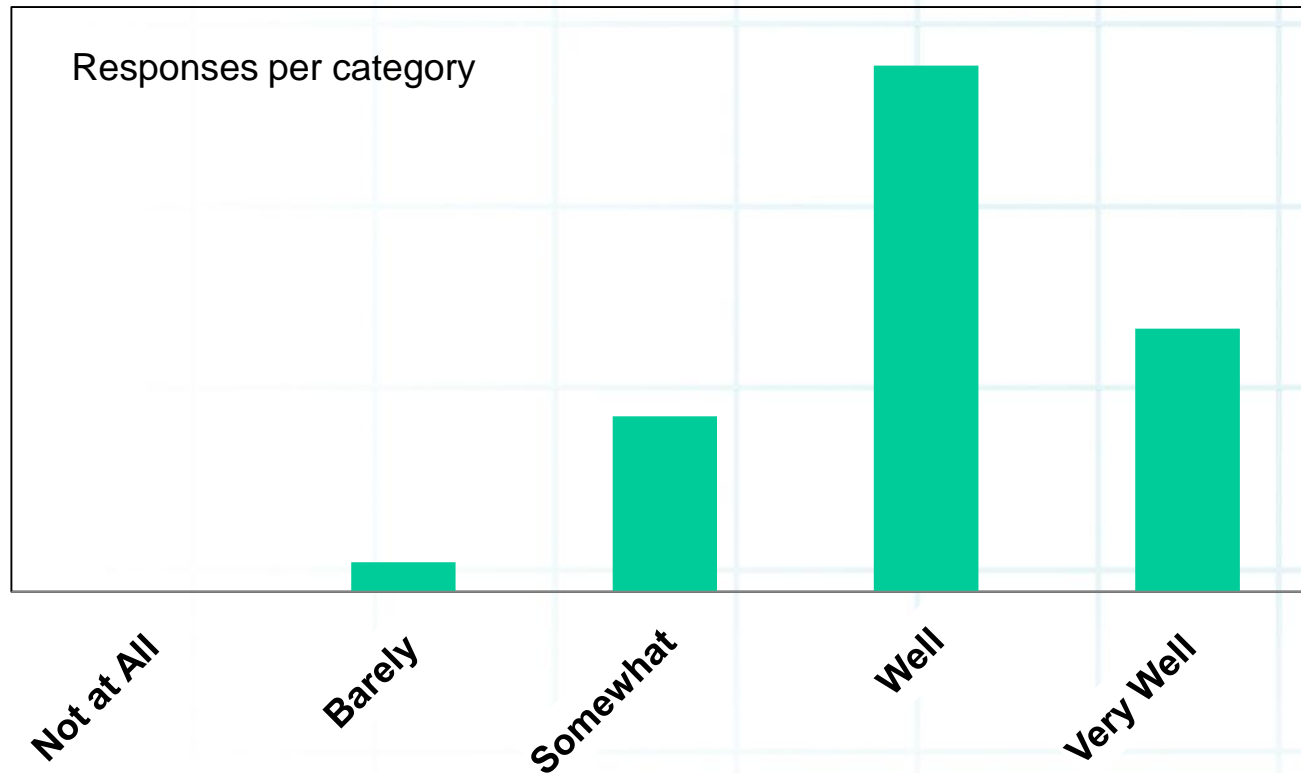
PMI-NAC 2009 Membership Survey Results

3. Why did you join PMI-NAC?



PMI-NAC 2009 Membership Survey Results

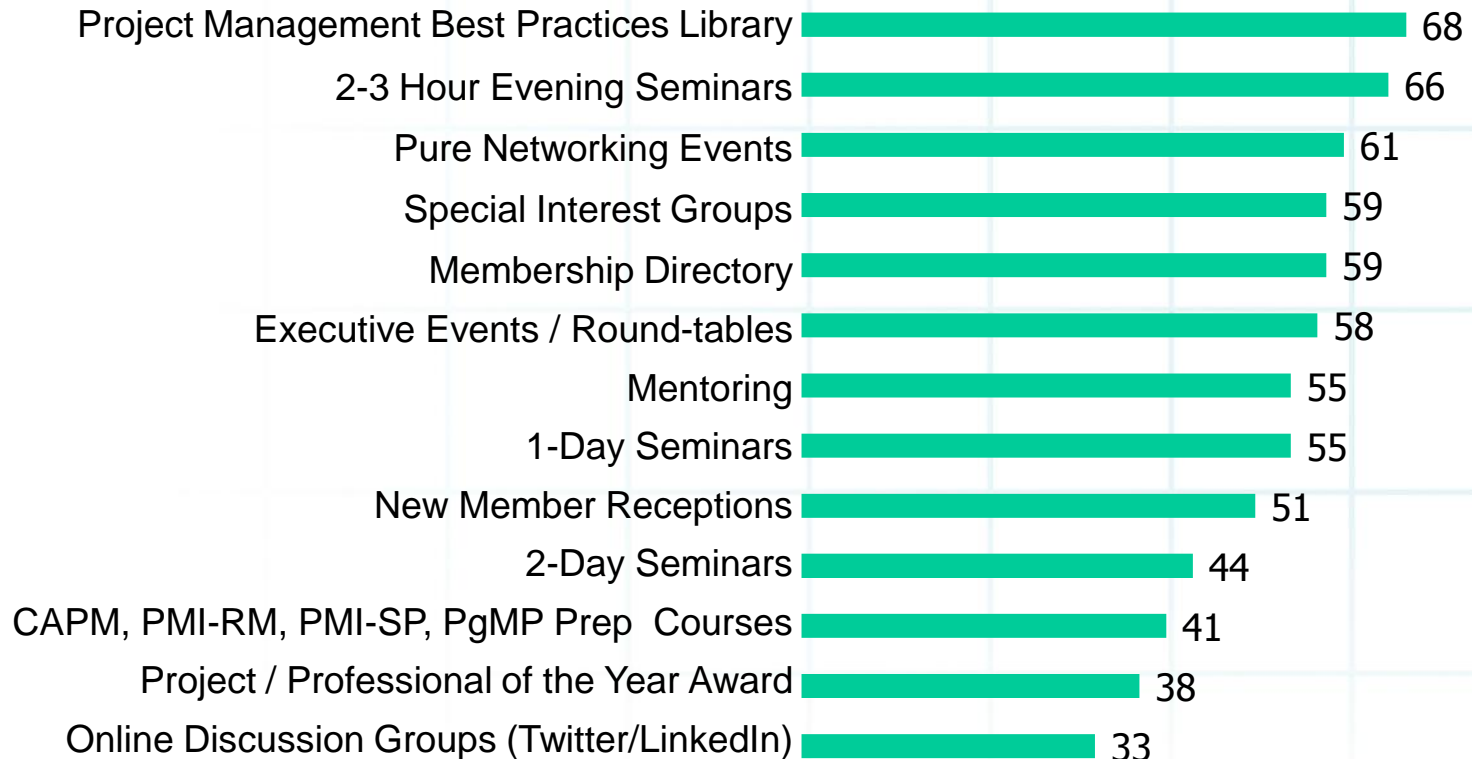
4. Thinking about the reasons you joined PMI-NAC and remain a member today - how well does PMI-NAC meet your needs?



PMI-NAC 2009 Membership Survey Results

6. How often would you participate in the following Potential future service offerings?

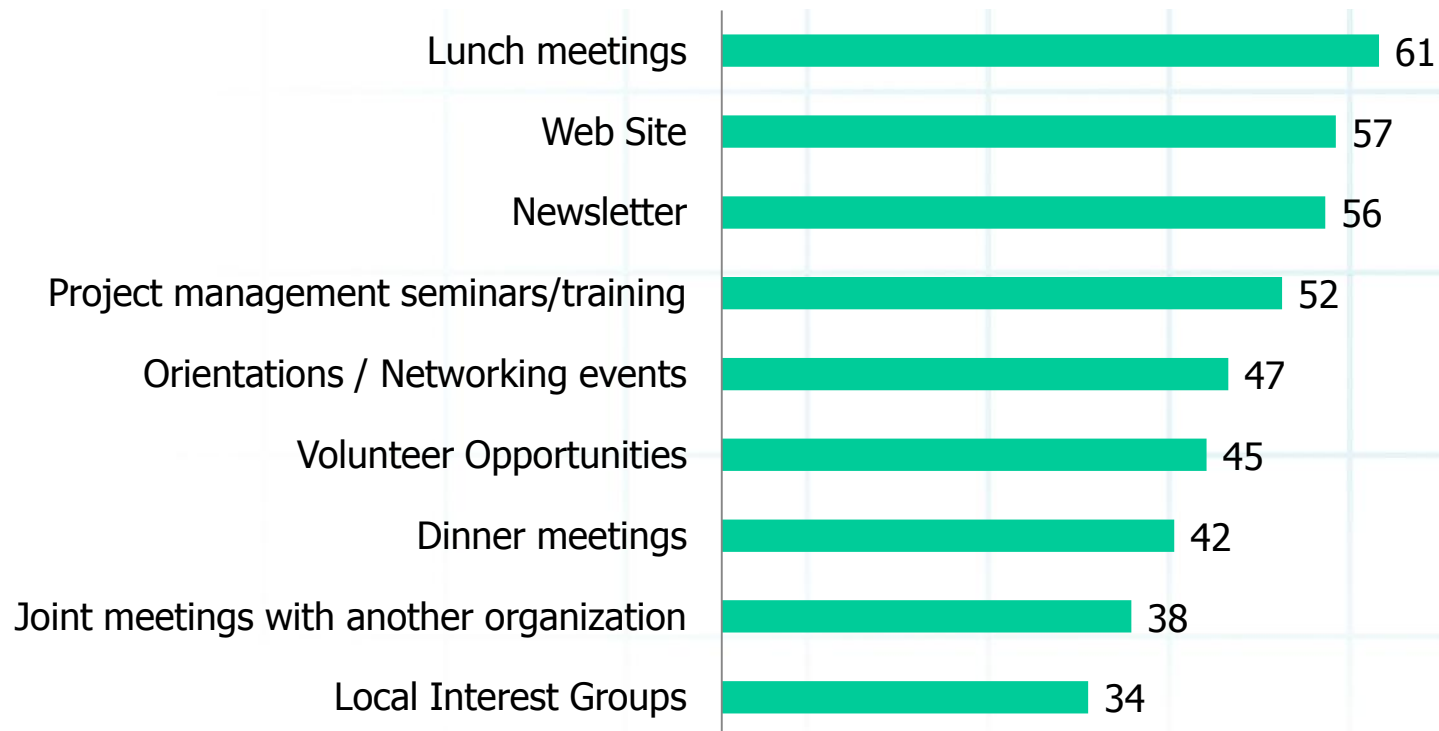
Service Offering Scores (higher values imply more potential for participation)



PMI-NAC 2009 Membership Survey Results

11a. How much benefit do you receive from our current service offerings? (Responses from 22 members who have earned their PMP Credential)

Service Offering Scores (higher values imply greater perceived benefit)



Current State – Web site hits

PMI-NAC Web average unique visits for per day / month this year

Summary by Month										
Month	Daily Avg				Monthly Totals					
	Hits	Files	Pages	Visits	Sites	KBytes	Visits	Pages	Files	Hits
Oct 2009	860	443	130	89	1108	544020	1705	2484	8424	16355
Sep 2009	1003	568	161	99	1538	1093431	2976	4830	17067	30117
Aug 2009	937	478	139	90	1508	1063244	2805	4320	14844	29048
Jul 2009	906	531	135	82	1447	1039106	2560	4186	16462	28092
Jun 2009	911	499	136	90	1334	810285	2704	4084	14983	27335
May 2009	1026	587	155	105	1398	1037751	3264	4818	18226	31809
Apr 2009	1186	690	179	121	1504	1109691	3658	5389	20700	35589
Mar 2009	979	577	146	82	1508	1069164	2561	4528	17897	30376
Feb 2009	874	494	118	65	1287	1081436	1844	3329	13844	24481
Jan 2009	871	468	121	67	1275	1085559	2083	3761	14526	27002
Dec 2008	728	438	109	64	1250	1005428	2011	3379	13607	22583
Nov 2008	623	364	98	58	1166	819847	1761	2968	10939	18701
Totals						11758962	29932	48076	181519	321488

Current State – Core Services

PMI-GOC Minimum Requirements

PMI BSC Objectives	Component Programs	Component Initiatives (Services, Projects, Products)	Component Program SWOT Analysis (Yes/No) Please attach SWOT	PMI Target for Services (Taken from PMF)	Component Performance Against PMI Targets by Year (Met/Exceeded/Short)			Component Service Targets and Actuals by Year					
					Year 1 2008	Year 2 2009	Year 3 2010	Year 1 - 2008		Year 2 - 2009		Year 3 - 2010	
								Targets	Actuals	Targets	Actuals	Targets	Actuals
Strengthen stakeholder loyalty				70% Membership retention	Short				68%	70%		72%	
				Good overall membership satisfaction	Exceeded				82%	85%		85%	
Profession enablers	Component Events	Monthly meetings / Annual conferences / Special Events	Yes	Minimum of 16 hours per year (sum of all events)	Exceeded				48	48		48	
				Good membership satisfaction for events	Met				95%	90%		90%	
Make PMI a customer centric organization	Component Customer Centricity Program	Component web site		Web site is updated monthly	Met				12	24		24	
		Communication with members via newsletter and/or email	Yes	Minimum of 10 comms per year	Exceeded				26	24		26	
				Good membership satisfaction with comms	Exceeded				90%	90%		90%	
		Recognition for new members and/or credentials earned by members		Minimum of 10 comms per year	Met				26	26		24	
		Marketing introduction and benefits package	Yes	Package exists and is updated annually	Short				none	develop		enhance	
Make leadership excellence a strategic competency	Component Leadership Dev. Program	Transition plan for new leaders	Yes	Plan is documented and updated annually	Short				informal	develop draft		enhance	
		Transition meeting with new leaders	Yes	Meeting held annually	Short				informal	formalize & doc. Process		enhance	
		LIM or regional leadership meeting attendance		1 board member attends per year	Exceeded				15 attendees	12 attend		12 attend	
Make market and business development a strategic competency		Strategic planning meeting to review strategic alignment and business plan		1 meeting per year	Met				met	meet		meet	
Maintain financial viability		Maintain financial records and complete Scorecard Report		Complete scorecard annually	Meet with this submittal				Submit in June	Submit in January		Submit in January	

Current State – SWOT

Strengths:

- ◆ Well established within the community
- ◆ Strong financial position
- ◆ Strong leadership with an experienced Board
- ◆ The DoD and business communities recognize that project management is a required competency for success.
- ◆ The membership base is heavily DoD represented.
- ◆ We have a unique, differentiated position for professional membership.
- ◆ Established and Recognized PMP Certification Training Program

Current State – SWOT

Weaknesses:

- ◆ No financial sponsors of the Chapter
- ◆ Strategic Planning for the Chapter is in early stages since there has been no real strategic plan in the past. A mechanism for ongoing review and evaluation is needed.
- ◆ Leadership beyond the Board team is not readily apparent.
- ◆ Short on volunteers for distribution of the workload and development of the future leaders – need to make better use of existing volunteers.
- ◆ Relatively few members are professionals from non-DOD industry.
- ◆ Stronger transition plan for new officers is needed.

Current State – SWOT

Opportunities:

- ◆ Form alliances to share ideas with related organizations (DAU, WID, NDIA, INCOSE, HATS, CoC)
- ◆ Form alliances with local corporations (corporate ambassador programs – large corporations like Toyota, Continental, SAIC)
- ◆ Growth outside of Huntsville to the greater North Alabama Community
- ◆ Expanded services to Chapter members
- ◆ Investigate implementation of a CAPM & PgMP Prep Classes
- ◆ Provide additional continuing education opportunities during the year
- ◆ Significant opportunities exist to more effectively market the Chapter's activities.
- ◆ Growing community base of potential members (BRAC, non-DOD, new companies establishing HSV offices).
- ◆ Growing volunteer base provides opportunities to grow future chapter leaders.

Current State – SWOT

Threats:

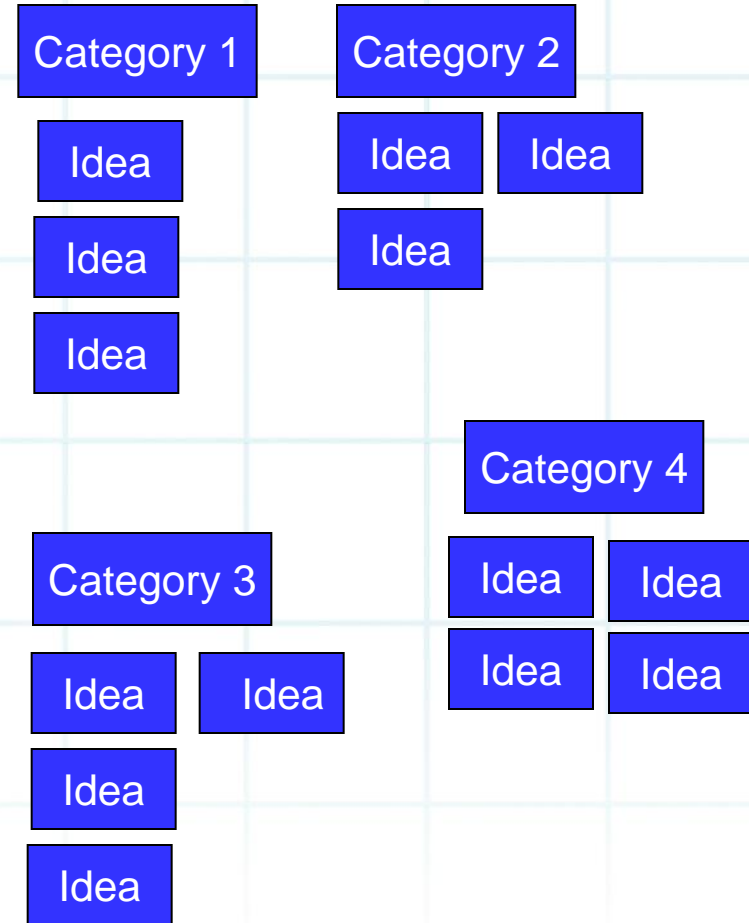
- ◆ The main source of revenue comes from the PMP Prep Classes and Special Events Seminars. Other providers in the area could try to compete with us and we don't have the necessary volunteer base to execute.
- ◆ Relatively high dependence for member draw and focus on DoD side of PM applications, compared to commercial and engineering areas - Could alienate existing and prospective members.
- ◆ Loss of key personnel on PMI-NAC board combined with no clear second in command for most positions on the board.
- ◆ Vulnerable to local DoD downsizing.
- ◆ Economic Down-turn
- ◆ PMI may be competing or suppressing special events by 3rd parties

Future State Brainstorming - Rules

- No premature decisions or evaluations
- “Wild” or “bad” ideas are welcome
- No "judgment" of ideas (positive or negative)
- Don't sit on ideas -- express them
- Quantity over quality
- Piggyback on the ideas of others
- Everyone participants

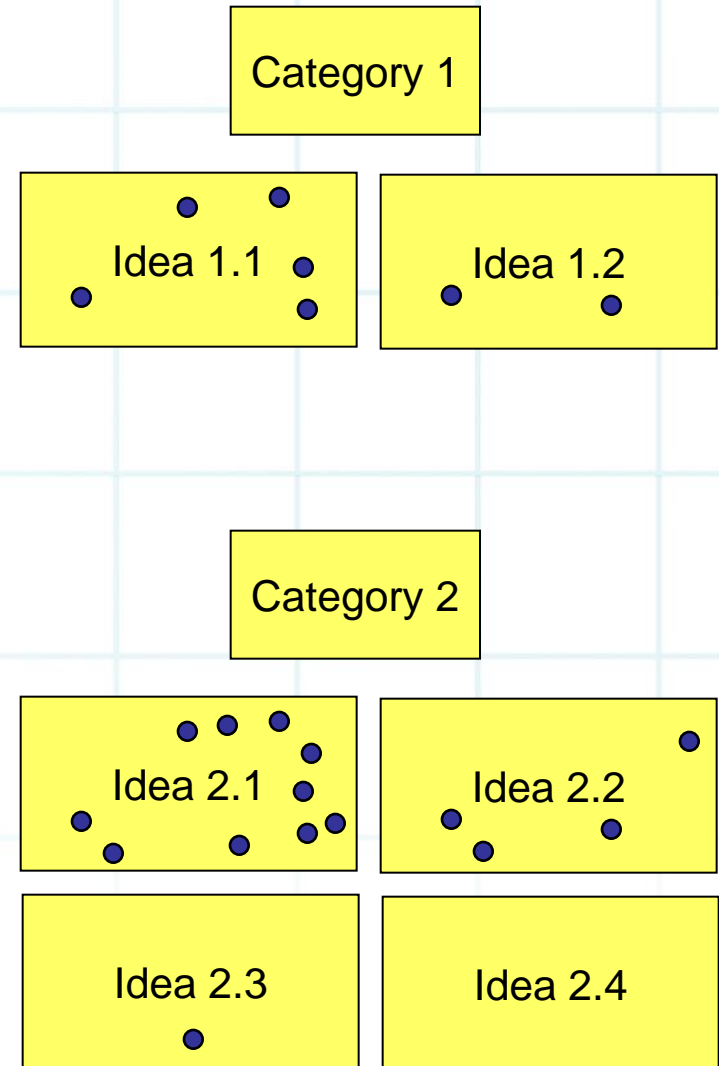
Categorize Brainstorming Ideas

- Pre-define Categories by area of responsibility, VP, or Director & assign a number for each category – i.e. 1, 2, 3...
- Participants write their ideas on post-it notes and place their ideas within a category
- Try to capture in noun, verb format with no more than 7 words
- After all ideas are up, review lists within each category for clarity, and move any that are miscategorized or create a new category if necessary
- Combine duplicates or closely related ideas



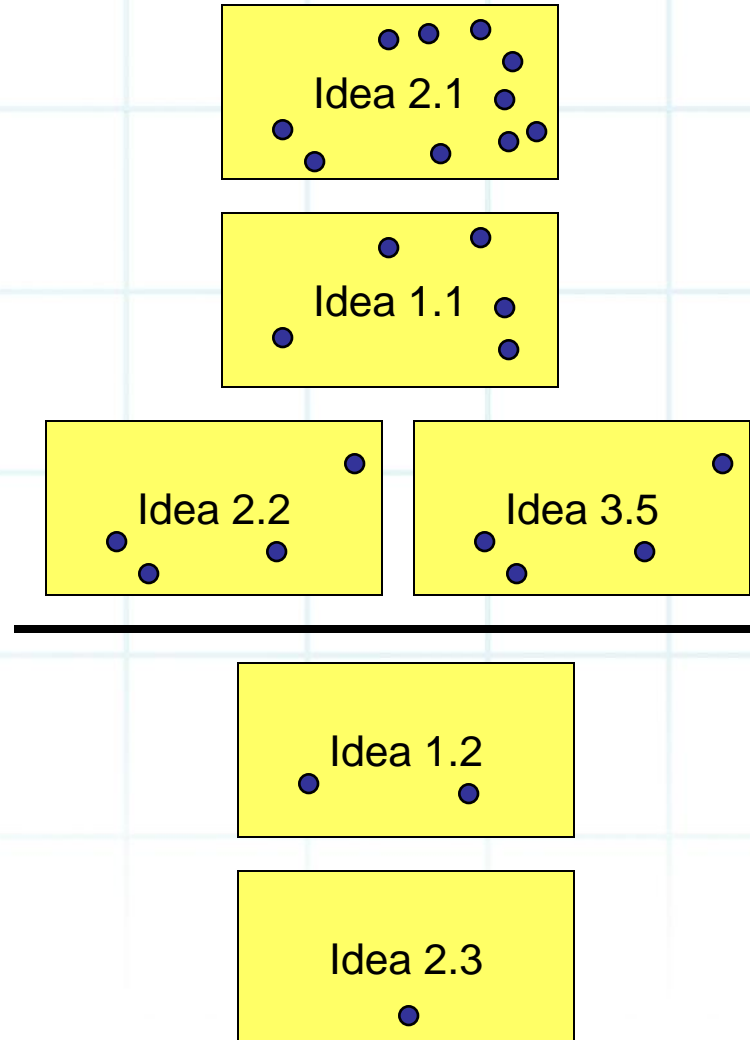
Prioritize Brainstorming Ideas – step 1

- Give each participant voting “dots” - the number of dots given to each participant = 25-30% of total number of ideas
- Each Participant "votes" on importance of ideas
 - i.e. more dots on the idea post-it, the more important the idea
- Participants “spend” their dots however they want on ideas, not on categories
- Once a dot is stuck on an idea post-it cannot be removed
- Must “spend” all dots
- Can put more than one dot on an idea

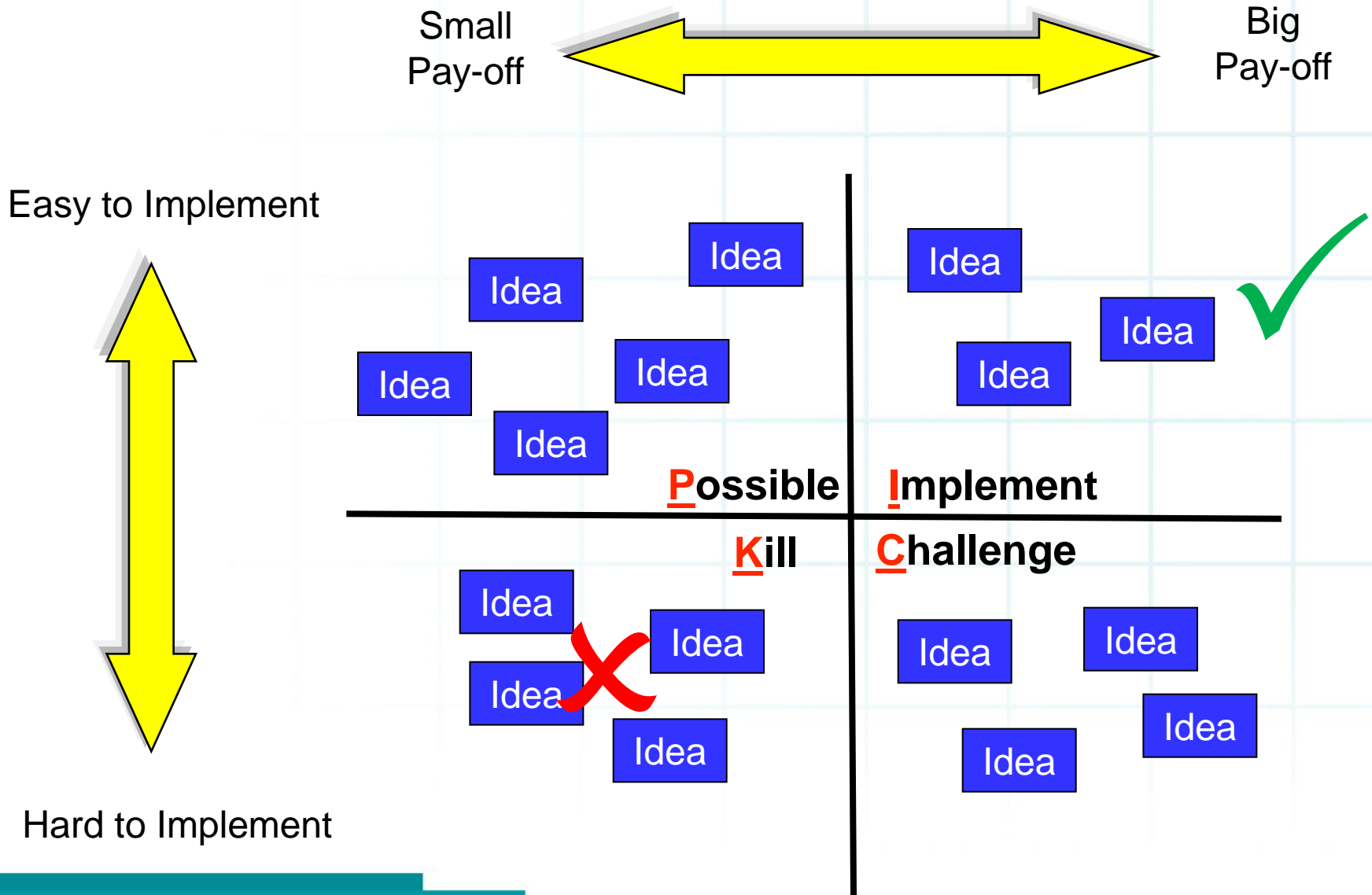


Prioritize Brainstorming Ideas – step 2

- Remove, but do not throw away, any ideas that received NO votes – record as “zero vote ideas”
- Write Category # on each idea remaining so as not to lose the category
- Sort ideas based on number of votes from highest to lowest
- Determine cut-off point where you have enough ideas to potentially implement
- Remaining ideas are recorded on a “if we have time, energy and volunteers available to do these” or are prioritized for later years.



PICK Chart



Map PICK Chart items to Chapter Long-Term Strategic Objectives

PMI-NAC Long Term Strategic Objectives

1. Become recognized as the premier provider / authority of project management knowledge, skills, and advocate for the effective application and use of those skills to achieve organizational strategic objectives
2. Provide a means for members to improve their project management knowledge and skills
3. Initiate and institutionalize mechanisms for sharing of resource skills and knowledge among project management practitioners
4. Create an environment for support, networking, and mentoring among project management professionals
5. Work with local organizations and academia to advance the understanding and acceptance of project management
6. Establish relationships with similar groups to share ideas
7. Serve as the example / image of successful project management in order to promote the project management profession
8. Implement sound organizational policies, procedures, processes, and tools to support the rapid growth of the chapter and position it to operate more efficiently and effectively in the future.

Allow VPs to self nominate Responsibility

2010 Strategic Planning “PICK” Chart

#	Possible, Implement, Challenge, Kill (PICK) chart results	Map to Strategic Objective	VP Responsible
POSSIBLE			
1	Member recognition <ul style="list-style-type: none"> • Length of membership • Most PMI-NAC events attended in a year 	4,7,8	Membership
IMPLEMENT			
2	Survey <ul style="list-style-type: none"> • Offer \$5 coupon off monthly lunch meeting for completion • Survey participants qualify for drawing item such as \$100 gift card • Complete survey at membership meetings 	8	Membership
3	Marketing <ul style="list-style-type: none"> • Develop marketing brochure for outreach • Add PMI brochure to communications packages 	1,5,6,7	Communications
4	Attempt to line up speakers for entire year	8	Programs
5	Alternate from luncheon to dinner meetings to reach more different members	2,4,8	Programs
6	Social Networking <ul style="list-style-type: none"> • Use virtual networking (Linked-in) • Use web to increase chapter value 	2,3,4,5	Communications
7	Newsletter <ul style="list-style-type: none"> • Develop a fresh brand image for PMI-NAC • Update graphics • Modify newsletter design/format – give VPs space to communicate – more value added 	8	Communications

Summarize Strategic Objectives by VP – Including Operational Responsibilities

Communication

#	Strategic and Operations Goals and Objectives	Map to Strategic Objective	“PICK” Item	Operations
1	Implement, develop, and improve marketing and publicity functions of PMI-NAC.	8	3,6,7	
2	Streamlined communication process and planning for PMI-NAC events	8	6,7	YES
3	Update and maintain the new chapter website	8	6	YES
4	Bring additional value to members in terms of networking and mentoring opportunities	4	6	


Update Monthly report with strategic objectives

#	Strategic Objectives / Operational Responsibilities	Activities Completed this Month	Activities Planned for Next Month (or beyond)
Strategic Objectives			
1	Participate in HATS & Chamber of Commerce events to promote PMI-NAC and identify opportunities		
4	Increase Collaboration with Region 14 and PMI Global to leverage regional opportunities for our members		
5	Support Continuous Improvement of Chapter strategic planning and operational reporting		
Operational Responsibilities			
2 & 3	Chamber of Commerce / HATS liaison (update their sites with our events and review their events to see what may interest our members)		
Metrics:			
	<ul style="list-style-type: none"> Strategic Planning Meeting Transition Meeting 		



Create your monthly strategic Follow-up plan before you leave the planning session.

Update Monthly report with strategic objectives

#	Strategic Objectives / Operational Responsibilities	Activities Completed this Month	Activities Planned for Next Month (or beyond)
Strategic Objectives			
<p>Monthly, board members should report actual progress / activities against strategic and operational objectives as well as activity plans for future months</p> 			<ul style="list-style-type: none"> Participate in 3-4 Chamber events / year to determine benefit of such Determine if participate in HATS POY
		<ul style="list-style-type: none"> Responded to survey from Global regarding chapter interest in participating in Global career website Agreed to present on Strategic Planning at Region 14 meeting 	<ul style="list-style-type: none"> Attend Region 14 meeting to identify collaboration efforts. Determine Global initiatives NAC may want to participate in such as career website
		<ul style="list-style-type: none"> Received completed 2009 spreadsheet from Sigma Services to use to prepare the 2009 SAS report. Updated Transition Plan Updated Procedure document for Strategic Planning Process 	<ul style="list-style-type: none"> Review / determine updated SAS reporting requirements Work with Allen to submit SAS report for 2009 Work with Ron to design improvements to the Strategic Planning process
		<ul style="list-style-type: none"> HATS is planning POY award for June this year. Supplied information on March evening meeting to HATS and Chamber 	<ul style="list-style-type: none"> Determine if we want to support / participate in this & how
		<p>Monthly Metric Results</p> <ul style="list-style-type: none"> Updated procedures with lessons learned Identified agenda topics for meeting based on transition plan 	<p>Year To Date Metric Results</p> <p>N/A until meetings held</p>

Lessons Learned

1. Most People do not understand Strategy – Train first then do
2. Require all the back-ground review first – so you do not spending too much time on the background (survey results, chamber stuff, etc.) during the event – just quickly refresh that information during the event
3. Do your membership survey earlier in the year so you are not summarizing those results at the same time you are preparing for your strategic planning event – it will save your sanity, and allow the board to absorb the results
4. Plan a WHOLE DAY – stay until 4:00. Do not leave until everyone has mapped their pick chart items to their individual objectives and their monthly report. If you leave anything to be done later, it will be like pulling teeth to get it done. Have everyone bring their laptops so they can complete this action before they leave.
5. Identify the strategic items which require specific budget – such as marketing brochures. These may require research and can be done later – DO identify what those items are before people leave!

Contact Information



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