Strategic Plan

prepared by the PMI-VI Board of Directors

Revision 5
Date: June 2018

OVERVIEW

Aligned with the Project Management Institute (PMI), the PMI Vancouver Island (PMI-VI) Chapter has embraced a process which led to the completion of a long-range strategic plan for the organization. The process facilitated (a) PMI-VI's identification of the future needs of members and customers, and (b) PMI-VI's options for satisfying those needs.

The Board of Directors initiated strategic planning activities during its retreat in Victoria BC during July 30/31 2011. Moreover, this plan has been updated based on the planning session held on July 7, 2012 in Victoria by the 2012/13 Board of Directors. The framework resulted from these planning sessions is presented below.

Each of the horizons focuses on a separate threshold of strategic dialogue:

- **10-30 Year Horizon** - Consideration of factors in the long-range planning horizon, and the articulation of a Core Purpose, Core Values, and an Envisioned Goal;
- **5-10 Year Horizon** - An evaluation of the environmental factors including risks (both threats and opportunities) that influence the future of PMI-VI, the project management profession, and the business environment in which we operate;
- **3-5 Year Horizon** - Long-range visioning articulated in goal statements with objectives that identify where PMI-VI could be in the next several years and how it can get there. The vision attempts to focus on how the organization will provide beneficial outcomes to members and other stakeholders;
- **1-2 Year Horizon** - Near-term operational strategy to implement the strategic direction. Focus is on action plans aligned to the outcomes delineated in the strategic plan.

This document is referred to as the "Working Strategic Plan." This acknowledges it requires further, on-going and specific attention by the PMI-VI Board. The PMI-VI Board will continue to refine the document as part of its annual strategic work.

PMI-VI'S CORE IDEOLOGY

The **core ideology** describes the consistent identity of PMI-VI that transcends all changes related to its relevant environment. Core ideology consists of two notions: **core purpose** – the organization's reason for being – and **core values** – essential and enduring principles that guide an organization.

Our Core Purpose

To advance the profession of project management throughout Vancouver Island in a conscious and proactive manner by engaging all members, communities, and businesses and by providing relevant information, resources, and activities.

Our Core Values

Aligned with PMI Global, PMI-VI is driven by a clear mission and an underlying set of values that guide how we act and influence the expectations of our stakeholders. Even as a diverse organization, we share a common set of values. Our core values are not subject to changes in the association and business environment or dictated by trends in organization management. These values are fundamental and deeply held.

As part of our Core Ideology, PMI-VI's Core Values are enduring and are guiding principles upon which we act. At PMI-VI we believe in:

- **Project Management Impact** - Project management is a critical competence that has a positive influence on organization results and society.
- **Professionalism** - Accountability and ethical behaviour ensures our commitment to PMI-VI stakeholders.
- **Volunteerism** - Volunteers and effective volunteer partnerships with staff are the best way to accomplish the Chapter's goals and objectives.
- **Community** - Bringing members of the global project management community together is the best way to facilitate their growth and advance the project management profession.
- **Engagement** - Encouraging diverse viewpoints and enabling individuals to contribute to the project management profession and to the Chapter.

Through times of growth and change, our core values provide continuity and a moral compass, communicating our beliefs and guiding our behavior.

ENVISIONED FUTURE (10 – 30 Years)

Envisioned future conveys a concrete, but yet unrealized vision for the organization. It consists of an **envisioned goal** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – vibrant and engaging descriptions of what it will be like to achieve the envisioned goal.

Envisioned Goal (Vision)

> *Organizations and individuals throughout Vancouver Island will embrace, value, and utilize project management and attribute their success to it.*

Vivid Description

1. **Project management is a core competency for organizations.**
   - Organizations employ individuals who possess skills, knowledge, and experiences that are specifically required in managing projects, programs, and portfolios and whose performance can be measured.
   - Organizations follow globally recognized project management standards.
   - Organizations have established educational, experiential, credentialing, and performance requirements for individuals engaged in specific project management roles.
   - Organizations have clearly established career paths, including one in project management that allows individuals to advance to the highest levels of leadership.
2. **Project management is as visible and recognized as other professions globally.**

STRATEGIC PRINCIPLES

Strategic principles provide the foundation for sound, consistent and values-based decision-making that PMI-VI needs to maintain its strategy and respond in a flexible manner to the changes in the needs of its stakeholders. They are not bound by one specific time horizon but are intended to influence strategy through development of all strategic plan elements.

1. PMI-VI shall use best business practices including project management where appropriate.

2. All products and services shall be supported with appropriate market research, a business case, and a life cycle management process.
3. Product / Service life cycle activities shall involve the right subject matter expertise to ensure product quality and maximize appropriate use of volunteer / component intellectual capital while managing time-to-market needs.
4. As PMI-VI develops and executes its strategy, it recognizes that the project management community includes any individual or organization that embraces the project management discipline, profession and career path; values the contribution of project management practitioners; and utilizes project management practices. This does not preclude individuals and organizations that display an awareness or inquisitiveness about project management.
5. PMI-VI shall primarily focus on activities/offerings that advance the practice of project management meeting diverse stakeholder needs.
6. PMI-VI shall endeavour to enhance the careers, skills and knowledge of practitioners allowing them to develop more business insight to bridge the gap between projects and organizational/business strategy. PMI-VI shall both anticipate and respond to market needs regarding any areas of specialization that PMI-VI may provide.
7. PMI-VI shall support organizations to create an environment that enables project management to accelerate the implementation of strategy and achievement of the organizations' objectives.
8. In striving to support our envisioned goal, PMI-VI must be creative, adaptable and flexible in accommodating the needs of our stakeholders.
9. PMI-VI's individual membership model supports the achievement of the Chapter's envisioned goal. This does not preclude the Chapter's pursuit of relationship or community participation that supports PMI-VI strategies.
10. PMI-VI shall take actions and make decisions in a socially and environmentally responsible way.
11. PMI-VI shall achieve its strategy through collaborative and or competitive efforts, as appropriate.
12. PMI-VI considers the users of technology-based forms of congregation and communication a strategic market.
13. In executing its strategy and serving its diverse stakeholders, PMI-VI shall support the PMI global brand through all aspects of the Chapter. PMI-VI shall ensure that its relationships with other organizations support this brand.
14. PMI-VI shall advance the application of project management knowledge, concepts and theory by society-at-large, including through active support of educational practices and dissemination of project management related educational information

STRATEGIC PLAN (3 – 5 Years)

The strategic planning items are established for three to five year achievement and annual review.

Value Proposition

The following differentiation statements are the key elements in establishing PMI-VI's unique position within the profession:

- PMI-VI establishes a premiere reputation as a credible resource and innovator for Project Management knowledge, trends and practices. When the PMI-VI achieves its differentiation strategy, PMI-VI will be seen as the thought leader and foremost authority on the discipline of Project Management.
- PMI-VI establishes a reputation as the preferred partner for the advancement of the profession and its successful practice. PMI-VI will be considered an indispensable partner in defining the Project Management career path educationally and developmentally.
- PMI-VI establishes itself as the leading and respected advocate for the mature practice of project management integrated throughout organizations.
- PMI-VI leads the evolution of the profession and the maturity of its practice. The business value of project management, at both an organizational and individual project level, will be widely understood by the business world and by government agencies in all parts of the world.

Goals, Objectives, and Measures

The following thinking represents PMI-VI's long-range strategic guidance for the next 3-5 years. Progress towards the goals is measured consistent with the strategy map below.

PMI-VI STRATEGY MAP

> **Vision:** *Organizations and individuals throughout Vancouver Island will embrace, value, and utilize project management and attribute their success to it.*

> **Value Proposition:** *Project Management Foremost Authority*

Key Issues

These are the key issues that PMI-VI needs to focus on to achieve its Strategic Objectives as delineated in the PMI-VI Strategy Map above.

Policy and Procedures

- Effective financial planning, management and reporting
- Improve organization viability through creation of policies, procedures and processes for Board and Chapter operation

Revenue Streams

- Certification - strengthen CEPS and explore others (i.e. Agile, etc)
- Sponsorship

Stakeholder Engagement

- Programs - increase quality and diversity
- Professional Development
- Membership Engagement through increase and diversification of Volunteering opportunities
- Electronic outreach

Document Change History

Revision	Date	Author	Notes
1	Jul 2011	Janice Christenson	Prepared based on the July 31, 2011 PMI-VI BOD Strategic Retreat – modified from the May 16, 2011 PMI Project Management Institute Strategic Plan Revision 18.
2 - Draft for Review	Jul 21, 2012	Peter Smither	Formatted and sent to Executive for comments.
3 - Final approved	Oct 1, 2012	Peter Smither	Posted on website and into the Google Docs repository. No Changes.
4	Aug 22, 2012	Calin Somosan	Updated based on the July 7, 2012 Board Annual Planning session. Updates: ● Clarified Core Ideology, Purpose and Values ● Clarified Envisioned Goal - Vision ● Corrected horizon for Strategic Principles ● Simplified Value Proposition ● Clarified purpose of Strategy Map ● Updated Strategy Map based on 2012 planning session ● Changed Mega Issues to Key Issues ● Elaborated Key Issues
5	July 2015	Trish Krol	Added Appendix A based on July 11, 2015 BOD Strategic Planning Session. ● 3 year strategic prioritizations (2015-2018)
6	June 2018	Amber McMillan	Added Appendix B based on June 17, 2018 BoD Strategic Planning Session ● 3 year strategic prioritizations (2019-2021)

Appendix A

Chapter Strategic Priorities 2015 - 2018

The following three strategic priorities were determined during a Strategic Planning Session held July 11, 2015 and facilitated by Darryl Jackson, PMI GOC Region 1 Chapter Partner.

1. OUTREACH

> a) Create and execute a plan to establish target markets and a PMI-VI approach for each market
>
> b) Raise awareness of PMI and PMI-VI by engaging current associations/organizations
>
> c) Develop and execute business and community outreach strategies for identified "other" associations and organizations

2. STRATEGIC FINANCIAL PLANNING

> a) Research financial requirements and best practices
>
> b) Create financial policies and procedures
>
> c) Establish an annual financial plan

3. EVENTS AND PROGRAMS

> a) Develop value criteria and analyses of all events and programs
>
> b) Segment membership to include requirements/resource analysis
>
> c) Research new events and programs (based on decisions after value analyses)

Appendix B

Chapter Strategic Priorities 2019 - 2021

The following three strategic priorities were determined during a Strategic Planning Session held June 16, 2018 at the Law offices of Reed Pope and facilitated by Martin Castellani, CEC and Amber McMillan, PMP CMC CVA.

1. **TRAINING & CERTIFICATION**
   a. Expand course for PMP certification, enhancing course materials
   b. Create and execute a sub-course specifically for CAPM certification
      i. Raise awareness of PMI certifications, specifically for novice individuals seeking base knowledge of PM
   c. Strengthen commitment to offer 6-9 full-ride scholarships for certification preparation, per annum

2. **SOCIAL MEDIA**
   a. Continue to develop and grow electronic outreach and accessibility of events
   b. Establish an annual social media campaign strategy
   c. Develop strategy for gathering diverse content to help build strong social media community
   d. Create firm policies and procedures for launching and maintaining social media strategy

3. **PROFESSIONAL DEVELOPMENT CONFERENCE**
   a. Initiate new strategies for PD conference model
      i. Secure better/larger venue
      ii. Provide entertainment/music
      iii. Add vendor trade show
      iv. Increase sponsorship

4. **BOARD SUCCESSION PLANNING**
   a. Create template for BoD succession planning
      i. Shadow roles for volunteers