



## Strategy 2013-2017

Project Management Institute (PMI®) Austin Chapter (PMIAC)



**PM**  
*Best!*

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## 1.0 Project Management Institute (PMI®)

### 1.1 What is PMI®

PMI (<http://www.pmi.org>) is world's largest not-for-profit membership association for the project management profession. Our professional resources and research empower more than 700,000 members, credential holders and volunteers in nearly every country in the world to enhance their careers, improve their organizations' success and further mature the profession.

### 1.2 Purpose

To advance the practice, science, and profession of project management throughout the world in a conscious and proactive manner. PMI's worldwide advocacy for project management is reinforced by globally recognized standards and certification program, extensive academic and market research programs, chapters and communities of practice, and professional development opportunities.

### 1.3 Core Values

#### **Professionalism**

Accountability and ethical behavior ensures our commitment to PMI® stakeholders.

#### **Volunteerism**

Volunteers and effective volunteer partnerships with staff are the best way to accomplish the Institute's goals and objectives.

#### **Community**

Bringing members of the global project management community together is the best way to advance the project management profession and facilitate their growth.

#### **Engagement**

Encouraging diverse viewpoints and enabling individuals to contribute to the project management profession and to the Institute.

## 2.0 PMI® Austin Chapter (PMIAC)

### 2.1 Purpose

PMI® Austin Chapter (<http://www.pmiaustin.org>) has been founded in 1992 as non-profit, tax exempt corporation (or equivalent) chartered by PMI®, and is dedicated to advancing the practice, science, and profession of project management leadership in a conscious and proactive manner.

- a. To foster professionalism and leadership in the management of projects, programs and portfolios.
- b. To contribute to the quality and scope of project, program and portfolio management.
- c. To stimulate appropriate global application of project, program and portfolio management best practices for the benefit of general public.
- d. To provide a recognized forum for the free exchange of ideas, applications, and solutions to project, program and portfolio management issues among its members, and other interested and involved in project, program and portfolio management organizational (PMO) leadership.
- e. To identify and promote the fundamentals of project management leadership and advance the bodies of knowledge for successfully managing projects, programs, portfolios by contributing to and achieving organizational objectives.

### 2.2 Vision

Be the Center of Excellence for Project, Program and Portfolio Management Leadership Best Practices in the Region.

### 2.3 Motto

**PM Best!**

Bring your “PM Best!” to PMIAC and

Expect “PM Best!” from PMIAC.

**PM**  
*Best!*

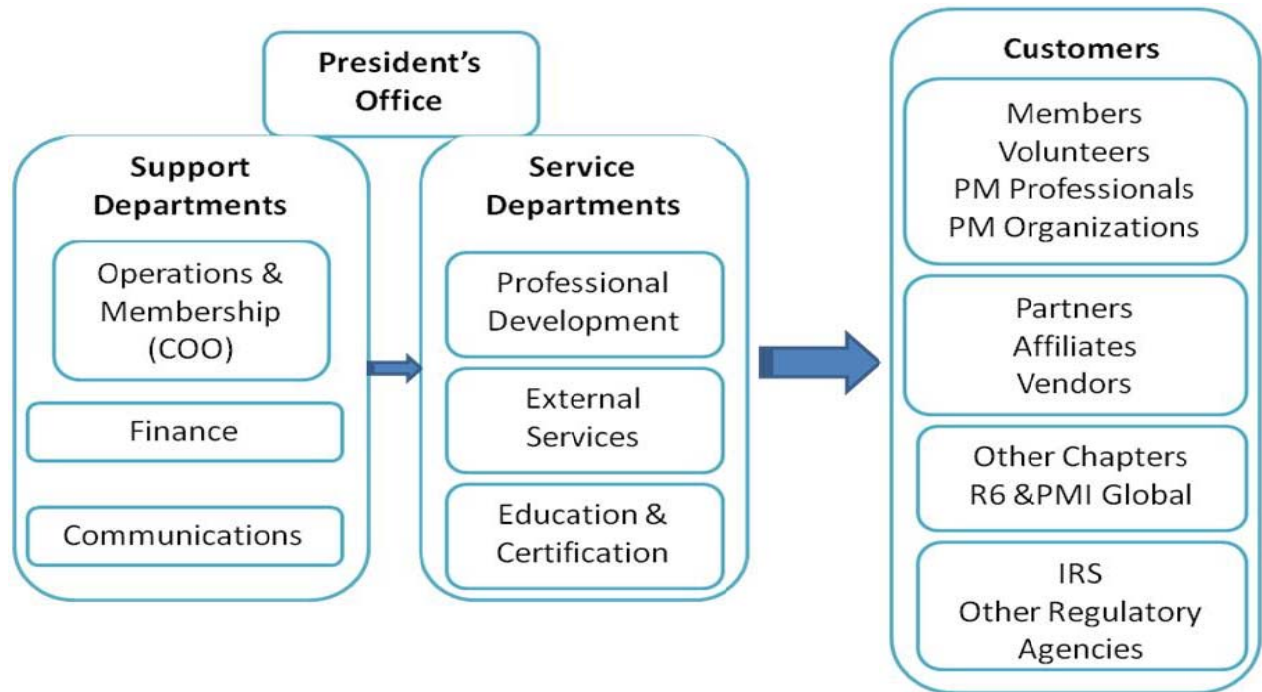
### 2.4 Mission

PMIAC’s mission is:

- To promote professionalism in Project, Program and Portfolio Management;
- To provide a forum for the free exchange of Project Management Leadership ideas, solutions and implementations;
- To disseminate state-of-the-art terminology and techniques to improve communication among Chapter members;
- To provide Project Management Leadership information, best practices and education to Chapter members;
- To promote Project Management, in general, and the PMI®, specifically, to companies, educational institutions and organizations in and around the Austin and Central Texas area.

## 2.5 PMIAC Organization and Customers

In order to be a successful organization, it is important for its leadership and its members to understand who the “customers” are and how the organization is structured to deliver high quality, professional programs and services to the members and affiliates.

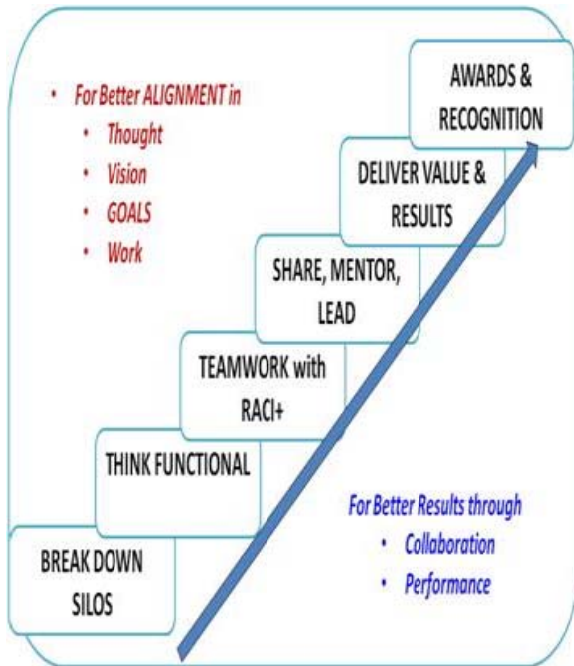


The illustration shows PMIAC’s internal and external customers and how the organization is structured to support its customers.

PMIAC’s departments are categorized into two broad areas based on the activities performed, programs managed and value provided. These two areas are support and service. The support departments concentrate on internal customers who support the underlying operations of the chapter. The service departments are primarily focused on customer facing activities and deliver services directly to our members, vendors, and other stakeholders.

### 3.0 Strategy

#### 3.1 Why Strategy?



For a strategy to be successfully implemented in an organization, it is important to have clearly defined vision, mission, and objectives; with proper tactical, operational and organizational alignment; and prioritized goals.

A well articulated strategy helps the organization, leadership, volunteers, members and customers to meet the expectations and goals.

#### 3.2 Our Strategic Objectives



With the Vision and Mission clearly documented, PMIAC’s leadership identified four pairs of strategic objectives for the near term (1-3 years) and the long term (3-5 years) success of the chapter. They also serve as the guiding principles and key considerations for all PMIAC initiatives and programs.

- How does the program improve member value and customer satisfaction?
- How does the program promote standards, best practices and leadership opportunities?
- How does the program increase community outreach and collaboration?
- How does the program illustrate financial integrity and good governance?



## 4.0 Alignment

### 4.1 Tactical Alignment

Tactical alignment describes what tactical initiatives will be continued, improved and/or newly undertaken to achieve the strategic objectives. The tactical plans were developed based on the feedback from each department.

#### **Improve Member Value & Customer Satisfaction**

PMIAC improves and strengthens the value provided to its membership by delivering outstanding programs, professional development opportunities, establishing clear communications, and providing value oriented educational opportunities. PMIAC ensures that its membership is engaged and provides good feedback that is heard and acted upon by the Board. It is important to PMIAC that the membership benefits from the programs and offerings, and enjoys chapter meetings, seminars and other events. PMIAC drives the customer service excellence within the PMIA departments and reflects the same in every chapter activity and engagement with the members and external customers. PMIAC strives to improve the Chapter's website, publications and member event registration experience by implementing robust & reliable communications platform.

#### **Promote Standards, Best Practices & Leadership Opportunities**

PMIAC strives to be at the forefront of promoting Project, Program and Portfolio Management profession. Serving the individuals and organizations, across the industries in the Austin and surrounding Central Texas areas. PMIAC serves those currently working in the profession, by offering programs to help them grow their talents and maintain professional standards. PMIAC endeavors to help every project manager in Austin join PMI® and PMIAC as a member, volunteer, get certified and earn Professional Development Units (PDUs) through the educational and professional development programs offered. PMIAC provides volunteer and leadership opportunities for professional growth through mentoring and other programs.

#### **Increase Community Outreach & Collaboration**

PMIAC increases the professional PM community involvement and corporate outreach. PMIAC increases corporate relationships and the Chapter's presence as the PM Leadership center of excellence. PMIAC increases Chapter's strategic partnerships with other area organizations, educational institutions and affiliates. PMIAC partners in special community service projects in a professional and proactive manner. PMIAC helps sister chapters and works with other PMI chapters by bringing collaborative programs and sustained benefits to the membership. PMIA increases the PMI presence in Educational institutions through our PMI Education Foundation program.

## **Implement Governance & Financial Integrity**

PMIAC implements good Chapter Governance by instituting reliable foundational processes, policies & procedures ensuring that all board members understand the roles they play in the success of the Chapter and its membership. PMIAC continues to be data driven with defined goals and metrics, and progress is measured by the compliance and meeting of Service Level Agreements (SLAs) & response to membership feedback. To meet the Financial Integrity objective, the Finance department provides the reports that guide the executive team to make sound financial decisions to benefit the Chapter and its customers. Monthly reports include the balance sheet and detailed profit and loss statements. Quarterly reviews of the budget against actual reports are provided so that income/expenses are examined to insure adherence to the set budget.

### **4.2 Operational Alignment**

Operational alignment lists the operational tasks, goals, metrics and performance measures that are being implemented to achieve the tactical plans. By successfully aligning the operational work plans with the tactical plans, the high level strategic objectives can be achieved.

#### **Operational Work Plans**

PMIAC's departmental work plans identify the specific tasks, owners, SMART (Specific, Measurable, Attainable, Relevant and Time Bound) goals, prioritization and status tracking.

#### **Metrics and Performance Measurement**

The departmental work plans are monitored on a regular basis with the progress tracked and issues resolved as needed.

#### **SOTO (State-Of-The-Office) Reports**

SOTO is the monthly operational report developed for PMIAC's departments. For each reporting period, Accomplishments, Planned events, Issues and Status Updates are reported. The SOTO reports are for internal consumption and are reviewed by the President's Office and other departments. The information is used to drive the agendas for the Officers meetings.

#### **SOTC (State-Of-The-Chapter) and Annual Report**

SOTC is a Quarterly report developed by the President's Office. Data is collected from the departmental SOTO reports. SOTC reports can be shared with the membership and other external entities as needed. Annual Report is produced during Q1 of every year.



## Officers Meetings and Board Meetings

The Officers / VPs are the elected members of the organization. President, President-Elect, Past President, and Vice Presidents of the Six departments (Finance, Education, Professional Development, Operations & Membership, Communications and External Services) meet at least monthly and on as needed basis to review the progress and manage Chapter business. Extended Board involves the Officers/VPs, Directors, Chairs and other Volunteers. This group meets at least quarterly and also on as needed to review the progress, improve alignment and take care of the Chapter business.

## Leadership Institute Meetings and Region 6 Best Practices Meetings

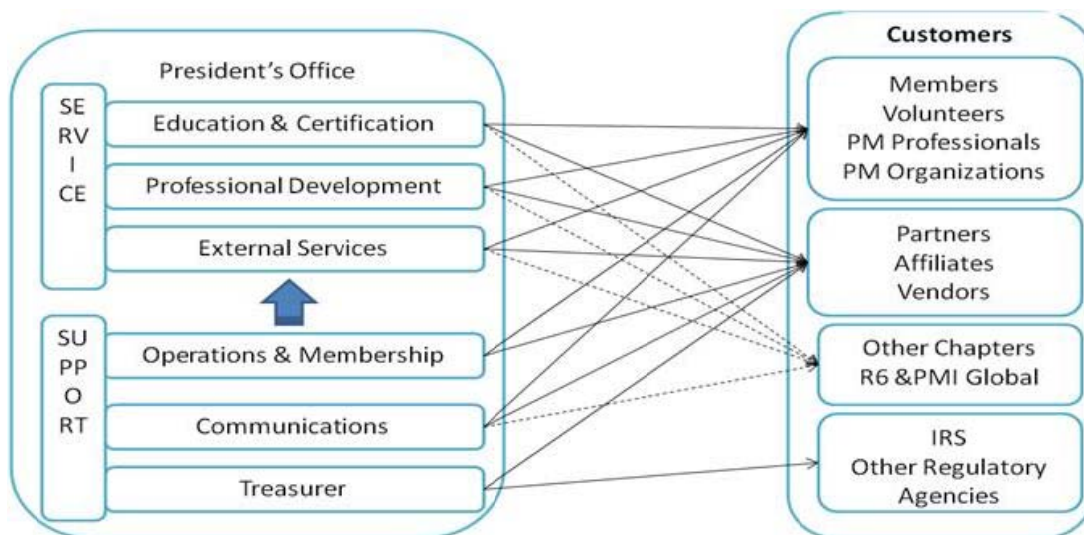
The Officers/VPs, Board members and extended volunteers participate in the monthly conference calls and Annual Region 6 conference. They may also participate in the Leadership Institute Meetings to obtain and share best practices.

## Annual Budgets

PMIAC's Fiscal year is from July 1<sup>st</sup> – June 30<sup>th</sup>. Operational budgets are constantly monitored by the Officers/VPs with necessary adjustments made when needed. Consolidated budgetary reviews are conducted quarterly. Budget planning for the fiscal year begins in April with the objective of setting the budget by June.

## 4.3 Organizational Alignment

PMIAC organization is aligned to serve our internal and external customers as outlined in the illustration below



Departments are categorized as Service oriented (serving external customers) and Support oriented (serving internal customers).

Director roles are aligned to be functionally supportive of multiple departments and the Chapter.

Chapter business is treated as a portfolio of multiple programs and projects with specific project/event managers assigned and leadership contributing to the success.

PMIAC follows PMI® recommended best practices in portfolio, program and project management.

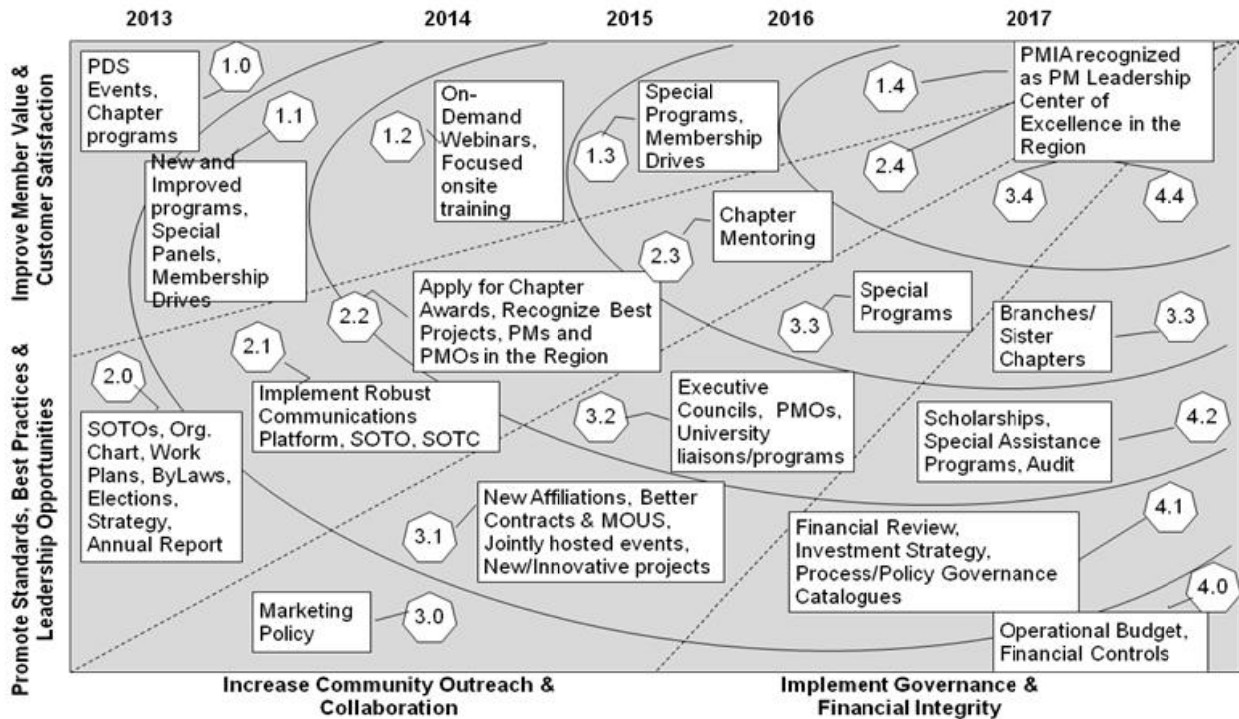
## 5.0 GOALS and Roadmap:

### 5.1 PMIAC Prioritized Goals



The picture above shows the strategic objectives of PMIAC and the prioritized initiatives with defined SMART goals. The projects were prioritized based on team member input and strategic alignment.

## 5.2 PMIAAC 2013-2017 Roadmap



The picture reflects the prioritized initiatives mapped to a 2013-2017 implementation plan. The four dimensions shown on the sides represent the Chapter's strategic objectives and each sector represents the initiatives to be taken up each year.

## 6.0 Strategy Updates

The chapter strategy is expected to be updated on an annual basis to ensure proper alignment with the strategic objectives. Team member and departmental inputs are collected on a quarterly basis and reviewed by Chapter leadership.

## 7.0 References

1. PMI® Austin Chapter Bylaws
2. PMI® Governance and Strategy documents; and Annual Reports from [www.pmi.org](http://www.pmi.org)
3. Strategy documentation and Annual reports from various PMI® Chapters
4. "ABCs of Building and Implementing a Strategy Plan for your Chapter": Presentation at Leadership Institute Meeting-Latin America, Rio De Janeiro, Brazil, March 29-30, 2014, Ram Dokka, Rahul Bhandari



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