

NEOPMI Chapter Program Meeting

November 17, 2011

6:00 PM	Registration opens
6:00 PM - 6:45 PM	Registration and Networking
6:45 PM - 7:00 PM	Chapter Announcements
7:00 PM - 8:30 PM	Featured Presentation

Meeting Agenda



- Recognition
 - New chapter members
 - New certifications
- Recession Proof Your Career updates
- Resumes
- Volunteer Opportunities
- Learning Opportunities / Upcoming Events
- Chapter Business Meeting – Mary Kosovich
- Featured Meeting Topic – *Project Planning*
- Upcoming Meeting Information
- Close meeting – Raffle

New Chapter Members October 1 – October 31



- Diana Duke
- Sandra Hanzlik
- Jennifer McDonough
- Maria Pajak
- Ann J. Towne
- Gang Min
- Brian Shellhorn
- Seth A. Goldfarb
- Carolyn Jean McDowell
- Alexis Rizopoulos
- Renee Sandoval
- Sherry Neubert
- Kathleen S. Cook
- Rodney R. Yates Smith
- Sarah Catherine Chadwick
- Matthew Hudas
- Christine Riggerbach
- Kevin Bonnett
- Elizabeth A. Kralj
- Mark A. Horste
- Hockkalingam Lakshmanan
- Tara Batchik
- James McDade
- John Wilson

New PMPs

October 1 – October 31



- Waiting on updated information from PMI

Recession Proof Your Career Group – Next Meeting



- **Date: Wednesday, November 30, 2011**
- **Time: 6:45pm – 8:15pm**
- **Location:** Progressive Insurance
- **Speaker: Tina Thelin.** Tina is the owner and managing partner of Wise Consultants Group, Ltd.
- **Topic: Social Media** – effectively using social networking to enhance your job search
- For more details and to register see www.pmineo.org
- Tina will be closing out the RPYC series for 2011. We are looking forward to a full schedule featuring exciting new ideas for 2012.

Recession Proof Your Career Group



- Needs Volunteers:
- Participate in team to plan/organize/facilitate Recession Proof Your Career Meetings
- Please contact Cath Smith,
CSMITHRPYC@GMAIL.COM

- **For those who have their resumes...
PLEASE STAND and introduce yourselves!**

- GIVE YOUR ...
 - <Name>
 - <Position Seeking>
 - <Resume on resume table?>

Company: Westfield Insurance

Title: Project Manager

Summary:

Oversees and manages all activities related to assigned projects, with primary responsibility for ensuring that the team meets client expectations on-time and on-budget. Manages the work integration, scope, expectations, quality, time, cost, risk, human resources, procurement, and communications for the team.



Company: Cleveland Clinic

Title: Project Manager (3 open positions)

Summary:

Develops departmental projects. Manages implementation and maintenance of projects and process improvement initiatives. Coordinates interdepartmental resources, develops project plans and process flows.

Volunteer Opportunities



- Announcement from Director of Community Services: Kris Kearns
- The chapter is looking for companies in the Akron/Canton and Cleveland areas to host chapter meetings.
 - If interested, please email eventmgmt@pmineo.com

- **2012 Community Service Calendar Planning Meeting**
- **Monday - Nov 21, 2011 - 7:30pm**
- **Location:** Panera (6700 Rockside Rd, Independence)
- We are looking for members to help define our next projects and want to hear from you! If you would like submit your ideas and help to shape the events for the coming year, please join us.
- Questions or comments: Please contact Kris Kearns at community@pmineo.org
- For more details and to register see www.pmineo.org

Learning Opportunities Upcoming Events

Dec 9 2011	Lambert Consulting	<i>Inspirational Leadership & Communication in a Project Delivery Driven Environment</i>
2012	Returning Presenters: •Roeder Consulting •Lee Lambert •Baldwin-Wallace College Professional Development	<i>Stay Tuned for Calendar of New Professional Development Topics</i>



- **Mary Kosovich, PMINEO Chapter President**

Outstanding Volunteer Award

For the 3rd quarter of 2011

Awarded to:
Keith Jenkins

For:

Managing the Professional Development Day project



Project Management Institute - Northeast Ohio chapter



PMINEO

2011 Chapter Update

November 17, 2011



Agenda

- PMI NEO Mission & Vision
- 2011 Status
- Plans for 2012



PMI NEO Mission

- Promote project management as a recognized discipline by creating an environment that fosters professional development through continued learning, networking and support of project managers

PMI NEO Vision

- To be recognized as an advocate of project management as a profession



2011 STATUS



2011 Strategic Initiatives

- ❑ Communication/Marketing
- ❑ Volunteer Sustainability
- ❑ Know our Members and Market
- ❑ Succession Planning
- ❑ Take it up a “notch”



Communications / Marketing

- Email blast sent to the NE Ohio PMs introducing chapter & benefits of a PMP
- Reached out to targeted firms in NE Ohio to further show the benefit of PMI



Volunteer sustainability

- ❑ Established exit interviews
- ❑ Implemented volunteer award
- ❑ Outlined transition plans



Know our members and market

- Communicated finding of PMI Survey



Succession planning

- ❑ Developed transition plan for all VP and board positions
- ❑ Finance documented operational processes
- ❑ Next step is to update operations manual



Take it Up a Notch

- ❑ Implemented top 10 company liaisons
- ❑ Held PDD
- ❑ Upgraded newsletter
- ❑ Continued community activities (Botanical Gardens, Ronald McDonald House)
- ❑ Improved REP relationships - revenue sharing



Take it Up a Notch (Cont.)

- ❑ Updating Operations Manual
- ❑ Updating Financial Procedure Manual
- ❑ Added two roles to finance team
- ❑ Changing Financial/Accounting System

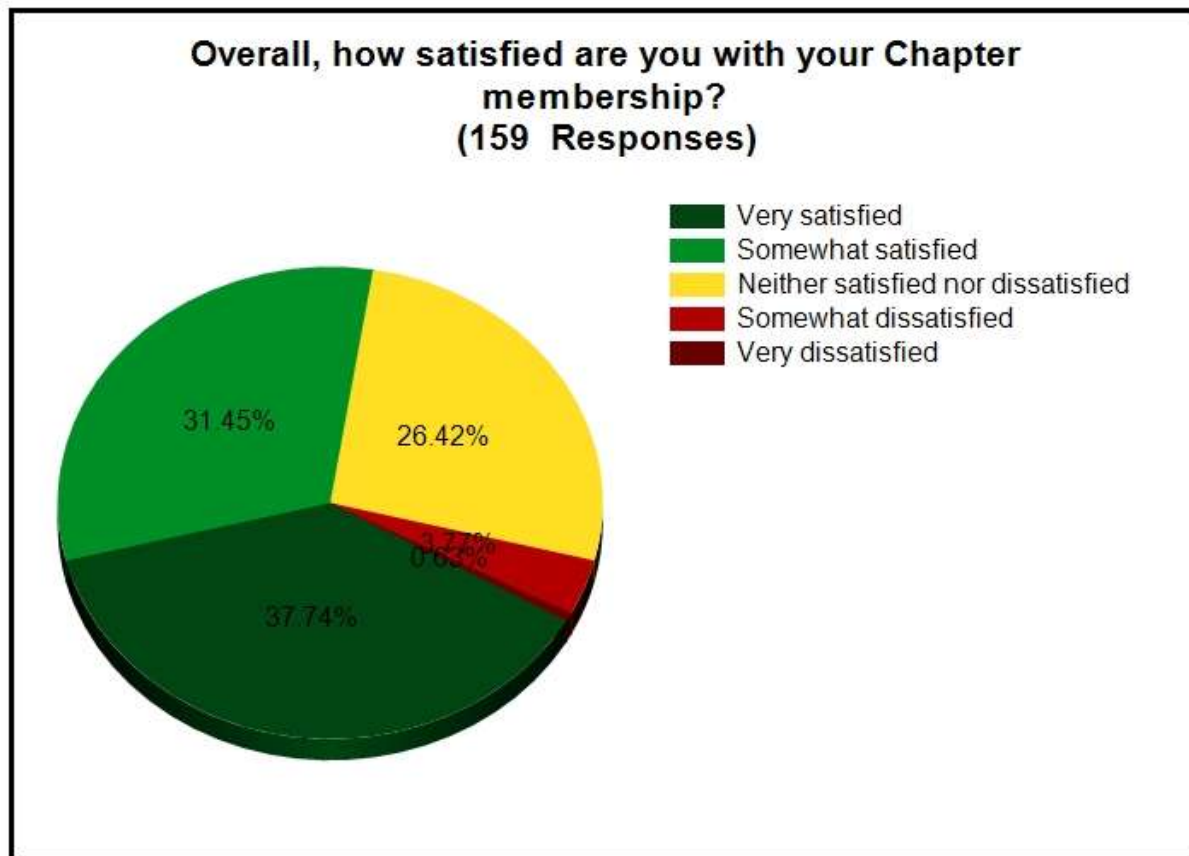
PMINEO Chapter Membership

Year	Membership
January, 2009	1,095
January, 2010	1,015
December, 2010	1,009
October, 2011	1,176

Top 10

Company	Members
Progressive	72
Rockwell	70
Key Bank	41
PNC	38
Cleveland Clinic	25
Antares Mngt. Solutions	24
Diebold	29
Swagelok	16
E&Y	15
Parker	15

Chapter Feedback



2011 Financial Performance

(through 10/31/2011)

Oct-2011			
	YTD Act	YTD Budget	
INCOME			
MB	51,401	49,853	
OP	44	10	
TOTAL INCOME	51,445	49,863	103%
EXPENSES			
MS	33,834	41,933	
OE	1,557	2,405	
GV	2,554	6,600	
TOTAL EXPENSES	37,945	50,938	74%
OVERALL TOTAL	13,501	-1,075	

Account	10/31/2011 Balance
ASSETS	
Cash and Bank Accounts	
1st CD	12,705.13
2nd CD	12,615.15
3rd CD	0.00
4th CD	0.00
NEO-PMI Checking (INCORP)	26,442.59
Savings NEO-PMI	38069.23
Petty Cash	0.00
TOTAL Cash and Bank Accounts	89832.1
TOTAL ASSETS	89832.1
LIABILITIES & EQUITY	
LIABILITIES	
	0
EQUITY	89832.1
TOTAL LIABILITIES & EQUITY	89,832.10



PLANS FOR 2012



2012 Strategic Initiatives

- Create operational excellence
- Demonstrate added value to our members
- Build our NEOPMI brand in the community
- Energize membership
- Develop long-term strategy



2012 Strategic Initiatives

- Create operational excellence
 - Maintain volunteer sustainability initiatives
 - Develop a survey strategy
 - Develop and share metrics / scorecard



2012 Strategic Initiatives

- Demonstrate Added Value to our Members
 - Evaluate PMINEO website
 - Consider adding PMBOK lessons
 - Provide PMIEF links
 - Links to development opportunities
 - Tell PMINEO members of features and benefits of PMI.org and PMINEO web sites



2012 Strategic Initiatives

- Demonstrate Added Value to our Members
 - Identify topics for different level members and types (non-IT) and industries (e.g., healthcare)
 - Create a working group to identify needs of expert level PMP's, different industries and types
 - Add/offer webinars, tours (different mediums)
 - Plan 2012 PDD
 - Provide scholarship opportunities



2012 Strategic Initiatives

□ Energize Membership

- Improve attendance
- Welcome back event
- Increase membership (new)
- Get'em in! Move'em up! – membership levels
- Contact those that are PMP's, but not members of PMI / NEO PMI



2012 Strategic Initiatives

- Build our NEO PMI Brand in the Community
 - Increase sponsorship and formalize sponsorship program
 - Explore marketing branding ideas



2012 Strategic Initiatives

- Develop Long-Term Strategy – 5 year
 - 2015 Region 4 meeting host
 - Keep a focus on succession planning through 2015
 - Increase our partnership with related organizations while maintaining focus on project management

2012 Draft Budget – Income

INCOME	
MB	
Meeting - Dinner Payment	28,134
Membership Dues	28,651
PDD & NEO Seminars*	1,800
Sponsors&Advertisement	1,000
TOTAL MB	59,584
OP	
Dividends	15
Misc Deposit	32
TOTAL OP	26
TOTAL INCOME	59,631

2012 Draft Budget – Expense

EXPENSES	
GV	
Board-Officer Meetings	300
Region 4 / LIM Meeting	7,500
TOTAL GV	7,800
MS	
Chapter Meeting	25,162
Awards, Gifts	91
Chapter Programs	-
PMO Forum	40
PMP Study Group	3,026
PDD - Prof. Dev. Seminars	10,212
Scholarship Funding	2,000
Mbr Recognition	1,675
Outreach	1,000
Web Hosting & Domain	5,045
Marketing-Communications	1,200
TOTAL MS	49,450
OE	49,450
Business Cards	
Insurance, Business	225
Legal-Prof Fees	635
Office Expense	516
Post Office Box	62
Tele Conference line	729
TOTAL OE	2,131
TOTAL EXPENSES	59,631
OVERALL TOTAL	(0)



QUESTIONS ?

“Project Planning”

- **Laura Miller, Program Committee**
- Planning Phase Overview
- Hands-on Exercise

Project Planning in Context

- “Project management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements.”

2008 PMBOK Edition 4

- 5 Process Groups

- Initiating
- ➔ **Planning**
- Executing
- Monitoring and Controlling
- Closing



- Planning Phase Expectations

- Establish total scope of the effort, define and refine the objective and develop the course of action required to attain the objectives
- Develop the **project management plan** and project documents to be used to carry out the project

Project Plan crosses Knowledge Areas

- Scope
 - Requirements, Scope Statement, WBS
- Time
 - Activities, Sequencing, Resource Estimates, Duration Estimate, Schedule
- Cost
 - Cost Estimates, Budget
- Human Resource
 - Staffing Plan, On-boarding & Training needs
- Procurement Plan



Project Plan crosses Knowledge Areas

- Quality

- Quality assurance and quality control plans

- Communications

- Communication Plan across all stakeholders (customers, leadership, project team, etc)

- Risk

- Risk Identification, Risk Assessment, Risk Response Plan(s) and assignments

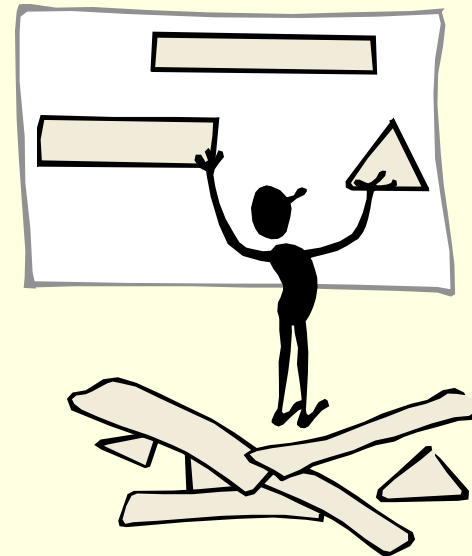
- Integration

- Charter, Project Plan Oversight, Kick-off Execution



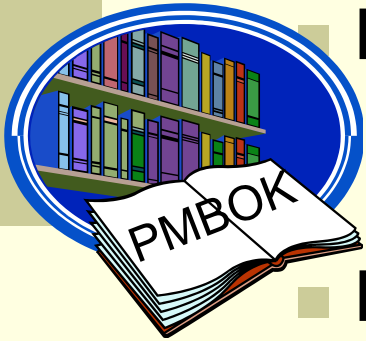
Project Management Plan

- Integrates and consolidates all the subsidiary management plans
- Creates baseline for each of the project planning deliverables
- Outlines a change management plan that documents how changes will be monitored and controlled



Additional References

- PMBOK Edition 4



- Refer to Section 3.4 “Planning Process Group”
 - Lists the Inputs and the Outputs each planning activity
- Refer to Section 4.2 “Develop Project Management Plan”
 - Explains in more detail inputs and supporting processes
- Refer to Section 5.3 “Create WBS”
 - Explains in more detail inputs and supporting processes

Practicing Project Planning

- Charter

- High-level document formally authorizing a project and its initial requirements that satisfy stakeholders' needs and expectations

- Deliverables List

- Unique and verifiable product, result or capability to perform a service that must be produced to achieve project objectives

- Work Breakdown Structure

- Deliverable-oriented hierarchical decomposition of work to be executed by project team



Practicing Project Planning

- Hands-on Exercise
 - Break into 5 groups aligning to the 2012 Goals
 - Create Operational Excellence
 - Demonstrate Added Value to our Members
 - Build our NEO PMI Brand in the Community
 - Energize Membership
 - Develop Long Term Strategy
 - Identify Deliverable(s) and Success Measures
 - Identify WBS and Activities



■ January – Kerzner Award Dinner

- Wednesday, January 18, 2012
- Location: Holiday Inn - Rockside (Independence)
- See www.pmineo.org for details and registration
- Still taking nominations for Project Manager of the Year and Project of the Year

■ February – Role of Governance in Project and Program Management

- Thursday, February 16, 2012
- Location: tbd



Raffle !



Select your own Prize

Today you could win one of these three prizes:



A complete, 35 contact hours PMP Exam preparation workshop you study on your iPod, iPhone, Blackberry or other player.

A \$99.97 value.

Learn more at

www.pm-prepcast.com



A convenient way for PMPs and PgMPs to earn over 20 PDUs on their iPod, iPhone, Blackberry or other player in the next year.

A \$199.99 value.

Learn more at

www.pducast.com



Prepare for PMP Exam day by practicing in an online testing environment, that recreates the "PMP Exam feeling" for you. Answer 1,800 highly realistic PMP Exam sample questions .

A \$89.99 value.

Learn more at

www.pm-exam-simulator.com/

You Can't Afford to Miss This...

Inspirational Leadership & Communication in a Project Delivery Driven Environment

Featuring...

Lee R. Lambert, PMP, CEO, PMI Fellow (2009)

**Raffle!!
Two Free
Registrations**



**December 9, 2011
Hawthorne Country Club
Solon, OH**

**\$349 (members)
*codeword "PMI"***

\$399 (non-members)

Find more info and Register at: www.PDUs4Pennies.com

Thanks for Attending

See you in 2012