



2021 Membership Business Meeting April 20, 2021



Basic information

2020 Member Survey

2020 Chapter Summary and Financial Review

2021 Chapter Objectives and Budget



As of 31 Mar 2021:

4949 members (-602 from 2020 review)

3830 credential holders

254 Volunteers



Officers

Mark Barash – President

Wes Tervo– VC-Membership

Lisa Blake – VC-Education

Cathy Bruce – VC-Technology

Charles Rosen – VC-Operations

Steve Warnek – VC-Marketing

Judy Balaban– Past President

Advisors

John Bufe – Advisor and VP-Infrastructure

Lystra Haynes – VP DEI and VP Recognition

2020 Year-End Survey by PMI Global



Satisfaction: Membership

Overall Satisfaction with Chapter Membership



	2018	2019	2020	Region Average 2020
Very satisfied	44%	49%	62%	47%
Somewhat satisfied	32%	33%	28%	30%
Neither satisfied nor dissatisfied	17%	14%	8%	15%
Somewhat dissatisfied	6%	3%	2%	6%
Very dissatisfied	1%	1%	2%	2%

Satisfaction with Chapter Leadership

	2018	2019	2020	Region Average 2020
Very satisfied	45%	55%	67%	53%
Somewhat satisfied	26%	24%	17%	22%
Neither satisfied nor dissatisfied	22%	19%	12%	19%
Somewhat dissatisfied	4%	2%	2%	4%
Very dissatisfied	3%	1%	1%	2%

Likelihood to Renew Chapter Membership

	2018	2019	2020	Region Average 2020
Extremely likely	52%	57%	66%	58%
Very likely	30%	31%	22%	24%
Somewhat likely	13%	8%	8%	11%
Not very likely	3%	3%	3%	4%
Not at all likely	1%	1%	1%	2%

Overall Value of Chapter Membership

	2018	2019	2020	Region Average 2020
Excellent	32%	38%	45%	34%
Very good	31%	34%	30%	31%
Good	25%	18%	18%	20%
Fair	9%	10%	6%	10%
Poor	4%	2%	3%	5%



2020 Plan

Chapter Initiatives

- **Growth**
 - *Emerging professionals*
 - *Transform Communication channels*
 - *New forms of Partnerships*
- **Outreach**
 - *Other PMI Chapters*
 - *Corporate and Executive*
 - *Community*
 - *Education/PMIEF*
 - *LCI growth*



2020 Results

Chapter Initiatives

- **Growth**
 - *Emerging professionals*
 - *Transform Communication channels*
 - *New forms of Partnerships*
- **Outreach**
 - *Other PMI Chapters*
 - *Corporate and Executive*
 - *Community*
 - *Education/PMIEF*
 - *LCI growth*
- **Unplanned additions**
 - *Virtual*
 - *Meetups*
 - *DEI enhancement*

2020 Year End Financials



VP	Revenue	Expense
Administration	\$ -	\$ 4,477
Business Relationships	\$ 2,480	\$ -
Finance	\$ 2,092	\$ 19,419
Marketing	\$ 3,800	\$ 13,265
Membership	\$ 125,132	\$ -
Outreach	\$ 1,050	\$ 400
President	\$ -	\$ -
Professional Development	\$ 67,367	\$ 21,783
Programs	\$ 6,668	\$ 27,668
Recognition	\$ -	\$ 20,577
Symposium	\$ 17,411	\$ 25,249
Budget	\$ 461,550	\$ 459,067
Actual	\$ 226,000	\$ 132,838
Surplus - goes to Reserve	\$ 93,162	



Year End Financials - Trend

	2020		2019		2018	
VP	Revenue	Expense	Revenue	Expense	Revenue	Expense
Administration	\$ -	\$ 4,477	\$ -	\$ 17,209	\$ -	\$ 1,226
Business Relationships	\$ 2,480	\$ -	\$ 11,746	\$ 128	\$ 11,444	\$ -
Finance	\$ 2,092	\$ 19,419	\$ -	\$ 14,626	\$ -	\$ 22,480
Marketing	\$ 3,800	\$ 13,265	\$ -	\$ 12,364	\$ -	\$ 6,801
Membership	\$ 125,132	\$ -	\$ 139,065	\$ -	\$ 135,520	\$ -
Outreach	\$ 1,050	\$ 400	\$ 6,545	\$ 6,660	\$ 4,970	\$ 6,885
President	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,826
Professional Development	\$ 67,367	\$ 21,783	\$ 66,283	\$ 23,688	\$ 17,950	\$ 10,507
Programs	\$ 6,668	\$ 27,668	\$ 38,365	\$ 81,228	\$ 33,330	\$ 60,444
Recognition	\$ -	\$ 20,577	\$ -	\$ 78,542	\$ -	\$ 36,498
Symposium	\$ 17,411	\$ 25,249	\$ 166,765	\$ 136,425	\$ 175,250	\$ 145,565
Budget	\$ 461,550	\$ 459,067	\$ 507,370	\$ 478,135	\$ 425,895	\$ 410,781
Actual	\$ 226,000	\$ 132,838	\$ 428,769	\$ 370,870	\$ 378,464	\$ 297,233
Surplus - goes to Reserve	\$ 93,162		\$ 57,899		\$ 81,231	

2020 Areas of Focus

Chapter Initiatives

- **Growth**
 - Emerging professionals
 - Transform Communication channels
 - New forms of Partnerships
- **Outreach**
 - Other PMI Chapters
 - Corporate and Executive Community
 - Education/PMIEF
 - LCI growth



2021 Areas of Focus



- **Prepare for the “new normal”**
 - LCI – women, veterans, new
 - Student alliances and student competition
 - Leverage members new to profession
 - Expand DEI programs, resources, focus
- **Demonstrate PMINJ value to Decision Makers**
 - Corporate Advisory Board
 - Ambassadors within employers
 - Articulate PMINJ value to employers
 - Enhance PMINJ PM days
- **Improve & Grow Stakeholder Engagement**
 - Improve 2 way communication between Chapter and Members
 - Review website navigability and appeal
 - Engage unengaged members

2021 Budget



VP	Revenue	Expense
Administration		\$ 23,031
Business Relationships		\$ 2,800
Finance		\$ 15,110
Marketing		\$ 3,500
Membership	\$ 125,000	\$ -
Outreach	\$ 3,000	\$ 3,000
President		
Professional Development	\$ 35,000	\$ 33,250
Programs	\$ 7,300	\$ 6,300
Recognition		\$ 17,900
Symposium	\$ 24,750	\$ 34,300
Technology		\$ 22,371
Budget	\$ 195,050	\$ 156,262
Actual		
Surplus - goes to Reserve	\$ 38,788	



Balance Sheet/ Reserves as of Charter Renewal

Financial Highlights for Fiscal Year 2020:

Currency:	USD
Reserves as of 31 December 2019:	1,303,087.00
2020 Incoming Funds (gross receipts):	240,168.00
2020 Expenses:	142,614.00
Reserves as of 2020:	1,400,641.00

Chapters who filed taxes with their government must send a copy of the annual tax filing to PMI Global Headquarters.

By completing and signing this form, I attest that I have verified the information submitted is true and complete to the best of my knowledge.

I agree to the terms mentioned above

Prepared By: Joyce Nussbaum

Date: 28 March 2021