



Project
Management
Institute®
Vancouver Island

Strategic Plan

prepared by the PMI-VI Board of Directors

Revision 5 - July 9, 2022

Date: July 2021

OVERVIEW

Long-range strategic planning began in 2011. The process facilitated

1. PMI-VI's identification of the future needs of members and stakeholders, and
2. PMI-VI's options for satisfying those needs.

In 2018, the Board further articulated ongoing strategic planning activities with *The PMI-VI Strategic Plan 2018-2021*. Two appendixes, one added in 2015, the other in 2019 kept the plan current.

In July 2021 the PMI Vancouver Island Chapter (PMI-VI) undertook an online planning exercise in order to draft our *Strategic Plan 2021-2024* and revised this document to align with the new PMI brand.

Appendix C continues extending the plan, incorporates lessons learned from the 2020 COVID-19 pandemic, charts a path to rebuild our in-person activities, and continues the work of developing value for our members.

This version extends the horizon framework laid out in its predecessors, and succeeds them as '*The Working Strategic Plan*.'

Each of four 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.

The Working Strategic Plan is a living document and 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 planning activities.

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. Updates are added as appendixes.

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 appendixes below represent PMI-VI's long-range strategic guidance in 3-5 year increments. Progress towards the goals is measured against 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*

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: <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> • 3 year strategic prioritizations (2015-2018)
6	June 2018	Amber McMillan	Added Appendix B based on June 17, 2018 BoD Strategic Planning Session <ul style="list-style-type: none"> • 3 year strategic prioritizations (2019-2021)
7	July 2021	Cara Segger	<ul style="list-style-type: none"> • Updated template to align with the new PMI brand • Updated Overview section to reflect 2021 planning activities and context. • Strategic Plan (3-5 Years) Key Issues section removed dated content • Added Appendix C based on the online whiteboard strategic planning exercise conducted throughout July 2021 <ul style="list-style-type: none"> ◦ 3-year strategic prioritizations (2022-2024)
8	Feb 2022	Lori Polukoshko	<ul style="list-style-type: none"> • Edited some formatting such as fonts and auto-numbering to be consistent throughout
9	July	Lori	Corrected the Strategic Plan Years throughout this

	9 2022	Polukoshko	should still be the 2021-2024 plan (i.e. three Fiscal years beginning July 2021 and ending June 2024)
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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 2018 - 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

Appendix C

Chapter Strategic Priorities 2021- 2024

The following priorities and themes were determined during a virtual Strategic Planning Session held June 26, 2021 facilitated by Zachy Olorunjojon and subsequent exercise using Miro whiteboarding software in July 2021.

KEY OPPORTUNITY AND CHALLENGE

1. Grow PMI-VI membership value & amplify impact to stakeholders
2. Rebuild the in-person vitality of the Chapter in line with COVID-19 safety protocols & provincial guidance, i.e. The BC Restart Plan.

STRATEGIC OBJECTIVES

1. SUPPORT PROFESSIONAL DEVELOPMENT, NETWORKING & CAREER OPPORTUNITIES FOR MEMBERS
 - a. Expand/adapt Mentorship Program to meet member needs
 - i. Bi-Annual Mentorship Program with hybrid delivery
 - ii. Add Mentorship Program Manager
 - b. Review Professional Development Conference (Event Committee)
 - i. Review PDC vision, mission, objectives and audience
 - ii. Survey members
 - iii. Conference planning
 - c. Refresh Programs (Dinner and guest speakers' series)
 - i. Restart in alignment with safety and provincial post COVID-19 regulations
 - ii. Virtual speaker sessions
 - d. Fulfill the objectives of the PM from the Heart program by arranging for non-profit projects to be supported by volunteer project managers
2. SUPPORT PROSPECTIVE PROJECT MANAGERS AND PROMOTE THE PROFESSION
 - a. Certification Program Development- create a new ATP compliant Certification program with a strong networking & coaching component
 - i. Feasibility check and train instructors
 - ii. Collaborate with the Canadian West Coast Chapter to avoid time-difference
 - b. Certification - deliver PMP & CAPM certification prep course in partnership with Montreal Chapter until we can rebuild our own offering.

- c. Attract Changemakers in alignment with PMI 4.0 Strategy
 - i. Engage with faculty at four universities & a college
 - ii. Create an academics landing page on our website
 - iii. Create changemakers in Universities
 - iv. Scholarships program
 - d. Corporate outreach - develop presentations for groups/organizations and deliver them to target sector audiences.
3. PROVIDE AN EFFECTIVE, ACCESSIBLE, INTERACTIVE DIGITAL EXPERIENCE FOR MEMBERS & STAKEHOLDERS
- a. Improve chapter website/newsletter for accessibility, mobile experience and user value
 - i. add graphic designer volunteer
 - b. Curate content for regular digital channels
 - i. Twice a month newsletter preceded by call out to board
 - ii. 3 social media posts per week across 3 channels
 - iii. add a social media manager
 - c. Content guidelines for directors