

Annual Report 2019

December 2019



PMI Nova Scotia Chapter

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TABLE OF CONTENTS

Table of Contents	2
Highlights And President's Annual Message	3
Executive and Portfolio Reports	4
Programs	4
Chris Mitchell - Vice President	4
Events	5
Professional Development	6
Events	6
Innovation and Partnerships	7
Operations	8
Sponsorship	8
Marketing & Communications	9
Membership and Volunteers	10
Policy & Governance	11
Technology	12
Treasurer	13
APPENDIX A: FINANCIAL STATEMENTS	
2017 Approved Financial Statements	
2018 Approved Financial Statements	
2019 YTD Profit & Loss Report	

HIGHLIGHTS AND PRESIDENT'S ANNUAL MESSAGE

2019 was a busy year of operations and development that marked several new milestones for the Nova Scotia Chapter of PMI.

Our new website was launched with new and expanded information for members including much requested job postings opportunity for recruiters and seekers alike, and a new volunteer role dedicated to expanding online content.

The Chapter made great leaps in developing important partnerships with organizations and associations throughout the Province and across industries and professions to support and promote mutually beneficial events and professional development including mentorship opportunities.

PMI Nova Scotia was very proud to support our first Study Group and social event in Cape Breton, with another Study Group booked in 2020.

Four successful Study Groups in 2019 and a strong kick off in September for our popular Mentorship Program.

PMI NS Events were popular and well attended in 2019 including our well loved Lunch n' Learn series, Dinner Events, Networking Events, Socials, and introduction to the Chapter's new Project Talks series with David Barrett. Looking forward to more to come in 2020.

Our Communications Team who continued to expand into our Social Media channels with even more information for our members week after week.

And our Membership team under whose support our small Province's chapter climbed to almost 700 members in 2019.

I wish to thank our very hardworking Board of Directors, our incredible team of talented volunteers, our Executive Team, and most of all to our Chapter members. We welcome all your ideas, suggestions and feedback to what we help provide Nova Scotia in 2020 and beyond. Feel free to reach out to us at info@pmins.ca or myself directly at rengland@pmins.ca

Here is to another great year for PMI Nova Scotia in 2020!

EXECUTIVE AND PORTFOLIO REPORTS

Programs

Chris Mitchell - Vice President

Events

Sandy MacMillan - Director

Denise MacDonald-Billard - Director

The Events team is responsible for providing a variety of events to meet the needs of members of the PMI Nova Scotia Chapter and to promote project management practice in Nova Scotia.

The Events committee organized and delivered the PMI NS Chapter events for 2019 based on the detailed plan from PMI NS Service Delivery.

The Events committee is made up of a team of volunteers who lead and deliver the PMI events. The group meets monthly to plan for upcoming events and to review the past events in order to identify areas for change and improvement. The Events Committee is also supported by Bev Thiessen, Chris Mitchell, and Robin England.

We would like to thank our Corporate Sponsors. They provided generous contributions to various PMINS Chapter events this year. Our Sponsors provided financial support, meeting space and facilities for PMI NS events. It was greatly appreciated.

For 2019, the Events Committee was responsible for the delivery of 2 Network and Learn events, Volunteer Appreciation Night Dinner, Spring dinner event "Sullivan's Pond – Daylighting Shubenacadie Lakes Ecosystem Project", and 5 Lunch and Learns. We also had a morning workshop in June. We partnered with several other professional organizations to deliver the annual Professional Development Summit (PDS) in April. We also worked with GoodLife Fitness Health & Wellness Leadership Summit, and provided a discount rate for our members. As well, this year we hosted another networking packed Summer Social Networking Event and will be hosting a PMI Holiday Social in December.

The PMI NS Chapter Events for 2019 are listed below:

Jan 23	Lunch & Learn - Lean Six Sigma - What Project Managers Need to Know	Trish Calder	Volta Labs
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Mar 7	Lunch & Learn – Rocky Road - The Journey from Project Manager to Agile Scrum Master	Andrew Mitchell	Halifax Water Commission
Apr 30	Professional Development Summit	PMI NS	Saint Mary's University
May 28	Lunch & Learn - Demand for Project Managers - What you really want to know!	Michelle Murray	Volta Labs
May 16	Dinner – Sullivan’s Pond – Daylighting Shubenacadie Lakes Ecosystem Project	Jamie Hannam	Future Inn
July 9	Summer Networking Social		Auction House
June 12	Morning Workshop - PMI NS Chapter Introduces Partnership with ProjectTalks	David Barrett	Barrington Tower
Oct 1	Lunch & Learn - Memorial Cup Project	Grant MacDonald	Barrington Tower
Oct 18	Network & Learn - Agile Round Table & Panel Discussion	Moderator Andrew Mitchell - Panel members from Dash Hudson, Citco Group, ResMed, and RedSpace	Barrington Tower
Nov 14	2017 AGM and Volunteer Appreciation Dinner	Volunteering and the 2020 North American Indigenous Games	Pier 21
Nov 26	Network & Learn – Delivering a Digital Building – Lessons Learned	Jude Abbey and Josh Hyslop	Emera Place

Dec 4	AGM & PMI Holiday Networking & Social Event		Pickford & Black
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Professional Development

Uzo Nnamdi – Director

The PMINS Professional Development team is charged with the responsibility of conducting the annual mentoring program and organizing certification study groups in line with our mission to advance the knowledge, practice, science of project management in a conscious and proactive manner within Nova Scotia. We do this with the help and support of our team of volunteers consisting of a seasoned administrator and experienced, certified project management professionals.

PMP/CAPM STUDY GROUPS

In the year under review, we successfully completed 4 PMP/CAPM Study Groups. 3 were held in downtown Halifax in the winter and fall seasons, 1 in Cape Breton. Nearly 50 course participants were trained, with several of the course participants proceeding on to the PMP Certification. 2 of these have in turn chosen to volunteer as Study Groups Facilitators thereby enriching our volunteer team and expanding the awareness and knowledge of PMI project management standards in the province. During this period, PMI announced a change to the PMP exam content outline with an initial cut-off date of December 15, 2019 which has now been extended to July 1, 2020. With this change, the Winter 2020 PMP Study group sessions in Halifax and Cape Breton will be the last to be facilitated using the current exam content outline.

Mentorship Program

The 2019 PMI Nova Scotia mentorship program kicked off in September 2019 with Halifax Water providing the space for the initial speed matching session. A total of 20 mentors and 23 protégés applied to the program. Mentor – protégé pairing was completed, 21 protégés being paired to 19 mentors. This was possible because our committed volunteer mentors were able to take on additional protégés. Once the pairing matches were completed, the individual groups met to outline their meeting schedule and discussion topics. Regular feedback will be obtained from all participants to enhance the quality of the program and enhance sustainability.

Innovation and Partnerships

Kostia Zaharov - Director

Innovation and Partnership is a newly established team at PMI Nova Scotia Chapter, focusing on partnership development and implementation of new technologies to create value for Chapter members and volunteers.

Throughout the year our team has explored multiple opportunities for professional development, networking, and co-branding to raise awareness of the Project Management profession and increase the Chapter footprint in Nova Scotia Business Community with different organizations such as:

- Halifax Partnership
- Digital Nova Scotia
- Engineers Nova Scotia
- ISANS
- Scrum Beers/Agile Community
- Perkopolis

While focusing on local partnerships, we have also reached out to Canada wide organizations such as Perkopolis, to present monetary benefits for Chapter members in a form of discounts with major retailers such as Adidas, WestJet, Avis, and others, available through Perkopolis membership. Registration with Perkopolis is available for active Chapter members and is free of charge.

Furthermore, the team has established fruitful connections with other PMI Chapters across Canada to learn and implement best practises from our fellow Project Management community members.

To leverage identified opportunities, Innovation and Partnerships team worked hand in hand with other Chapter teams, such as Marketing & Communications, Professional Development, Events, and others.

For the next year we are planning to continue developing and strengthening our connections with existing partners and supporting organizations, as well as developing Academic Outreach Program and Agile focus group.

Operations

Vanessa Greer - Vice President

The Operations Team directly platforms the delivery of PMI NS programs and events from administrative support, marketing and communications (eblasts, social media, website administration, etc), membership support, sponsorship, and the management of volunteer recruitment and onboarding.

We welcomed **Sromon Das** to the role of Director of Technology. Technology was a new portfolio this year. This year, Sromon has overseen the upgrade of our website and the roll-out of our chapter App.

Tammy MacDonald continued for a second year as Director of Marketing and Communications. The Marketing and Communication continues to document new processes and procedures, cross-train within the team, and look for ways to deliver communications to our members.

Donna Karsten continued for a second year as Director of Membership and Volunteers. The Membership and Volunteers team have managed the chapter's volunteer requirements and used PMI's official volunteer management software VRMS where interested volunteers can visit regularly to look for new, engaging opportunities to volunteer with our chapter.

Selicia Douglas continued for a third year as Director of Policy and Governance, importantly overseeing development of key chapter and board policies following completion and approval of the Chapters' updated Bylaws. Selicia stepped down from the board of directors in the Fall of 2019.

As always, a most special and appreciative thank you to our administrative cornerstone and life line **Bev Thiesson** for her continued support to the Board of Directors and Chapter members.

Sponsorship

Vacant Director Role

PMI Nova Scotia is very grateful to the following sponsors for 2019:

Sponsor Organization	Sponsor Category
Citco	Silver

Barrington Consulting Group	Silver
Halifax Water	In-Kind
Volta Labs	In-Kind
Innovacorp	In-Kind
NTT Data Sierra Systems	In-Kind
Halifax Water	In-Kind
Citco	In-Kind

Marketing & Communications

Tammy MacDonald – Director

2019 focused on sustainability. In 2018, we built bench knowledge and strong process. It has been another great year for the Marketing and Communications team! Their day to day responsibility continues to be to create, market, and publish events. They do this via multiple channels, including but not limited to, newsletter publications, social media updates, and ensuring our website remains current. Engaging our community users is critical to our success. Some events to name a few that have been marketed and communicated throughout 2018 are: Lunch and Learns, Networking Opportunities, Study groups (including Cape Breton), Mentorship Program, Training opportunities, and our Summer Social. One exciting initiative that continued in 2019 was our Volunteer profiling thru our Social Media Facebook page. This allows us to showcase some of our many hard working volunteers and continue to drum up awareness and interest for our Chapter.

Though it has been another busy year for the team we continued to invest time to strengthen our team by supporting our cross training initiatives, enhancing training material, and onboarding new and returning members to our team.

The team has accomplished a lot and we continue to learn and grow. Though 2019 was a great success, we look forward to 2020 and what it has in store for us.

Committee Members:

Gail Okoh – Team Coordinator

Tanya Dent – Lead Social Media Coordinator

Issac Joseph – Eblast (Newsletter) Coordinator

Simranjit Singh - Social Media Coordinator

Membership and Volunteers

Donna Karsten - Director

2019 Membership Goal Setting

Each year the chapter sets goals for their targets in the following year. PMINS’s goal for 2019 are:

1. Percentage Growth Goal for 2019: 2.5%
Overall Number of Members Expected in 2018: 661 members
2. Retention Rate Goal for 2018: 75%
Number of Retained Members Expected in 2018: 484 members
3. Recruitment Goal for 2018: 150 new members

Membership By-the-Numbers

2018 – December 31, 2018

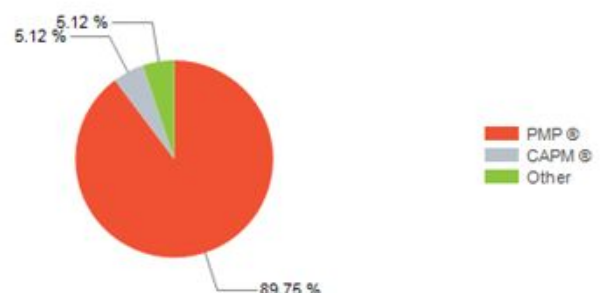
Membership: 645

2019 – to date (November 25, 2019):

- Membership: 693
 - Membership Growth 2016: 7.4%
 - # of 1st Year Members: 141
 - % of 1st year to total: 20%
 - Number of renewals 499
 - 2016 Retention Rate: 77%
 - Chapter Auto Renewals 483
- So far in 2019, the Chapter did a much better job retaining current members, with 5 weeks to go, we have already reached our 2019 target of 75%. This increase in renewals may be in part to the number of Chapter Auto-renewal. There is also still time to meet and exceed our new member targets. We have also, already surpassed our overall membership goal of a 2.5% increase, up to 693 members from 645, representing an increase of 7.4%.

Credential Holders

693 members hold a PMI credential as follows: PMP®: 473; CAPM®:27; PMI-ACP®:14; PMI-SP®: 2; PMI-PBA®: 5; and PMI-RMP®: 6. The chart below illustrates the percentage of each



credential of the overall credentials held. PMP credentials remain the highest percentage of all credentials held.

Membership Survey

There was not a satisfaction survey conducted in 2018, however, there is a survey open from November 7 until December 29, 2019. The results from which will inform strategic planning in 2020.

2019 Volunteers

In 2019, the Nova Scotia Chapter of PMI had volunteers in multiple portfolios. A total of 46 volunteers helped out doing everything from planning events to teaching lessons. While some volunteers are counted in more than one category, this is up from last year's total of 46.

- Board Members: 13
- Events: 5
- Communications and Marketing: 4
- Membership, Volunteers and Outreach: 4
- Technology 1
- Innovation and Partnerships 1
- Policy 1
- Finance 1
- Professional Development:
 - Mentors: 16
 - Study Group Facilitators: 18
- Total: 64 Volunteers

At the 2019 Volunteer Appreciation Night (VAN), volunteers were invited to enjoy a reception at Pier 21 followed by a presentation by Shawn Cleary on Volunteerism and the 2020 North American Indigenous Games. The 2018, Volunteer of the Year Award went to Cliff Johnston, for his dedication to Professional Development and the PMINS Study Groups. There were also two President's Awards; Kostia Zaharov, Director of Partnership and Innovation and Udenwa Uzoamaka Nnamdi, Director of Professional Development for their Outstanding Contribution to the PMINS Board and the Nova Scotia Project Management Community.

The Chapter encourages each member to volunteer - search advertisements on VRMS or by express an interest to the Director at membership@pmins.ca.

Policy & Governance

Selicia Douglas - Director

(From Above): Selicia continued for a third year as Director of Policy and Governance, importantly overseeing development of key chapter and board policies following completion and approval of the Chapters' updated Bylaws. Selicia stepped down from the board of directors in the Fall of 2019.

Technology

Sromon Das – Director

- Website upgrade to latest Joomla platform, ensuring better performance of website components
- Using platform components to streamline internal processes
- Redesigned website and introduced content geared towards members
- Introduced new Job Portal feature
- PMI iOS and Android app is functional

2020 Focus

- Rebrand website in line with PMI Global rebranding
- Partner with Proteon to further develop app with relevant features
- Focus on creating original content by partnering with members, PMINS partners and local community

Treasurer

Derek Dow – Treasurer

This year was a very good year for the Chapter from a financial point of view. After running a sizeable deficit (more than \$10,000) in 2018 to celebrate our 20th anniversary, 2019 saw the chapter back in the black with an estimated year end surplus of approximately \$11,000.

In 2019, the Chapter has now become current with CRA with respect to HST report. As noted in previous reports, the Chapter had not consistently reported HST filing since 2010. While the Chapter returned to regular reporting in 2017 when I took over the Treasurer role, there was still a number of past years that needed to be filed. Significant effort was expended in 2018 and 2019 to complete these filings and by mid 2019 we were able to make all the outstanding filings and pay what was owed. This puts the chapter in a very secure footing financially and allows us to finally look towards planning what to do with the accumulated members equity. I want to thank Nancy Muise and Herb Thiessen for their efforts in assisting me with the HST filings.

This year we also became fully current with reviewed financial statements and for the first time in many years were able to present reviewed financial statements for the previous year (2018) at our 2019 AGM. These financial statements for 2017, 2018 and 2019 (unreviewed) are attached in the appendices and are summarized as follows:

2017

Net income: \$5,438

Net assets: \$133,959

2018

Net income: \$(10,827)

Net assests: \$119,481

2019 (Projected)

Net income: \$11,068

Net assets: \$130,549

I have announced that 2020 will be last year as Treasurer (and member of the Board). In consideration of this, I will spend the coming year working to better document the financial policies and procedures that we have put into place over the last three years. To help with transitioning the treasurer role, the board has decided to create a Deputy Treasre director role for 2020 work work closely with me and then take over a Treasurer in 2021.

APPENDIX A: FINANCIAL STATEMENTS

[2017 Approved Financial Statements](#)

[2018 Approved Financial Statements](#)

[2019 YTD Profit & Loss Report](#)