

Annual Report 2015

November 18, 2015



PMI Nova Scotia Chapter

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HIGHLIGHTS AND PRESIDENT'S ANNUAL MESSAGE

It is my distinct pleasure to present the 2015 Annual Report on behalf of PMI Nova Scotia Chapter Board of Directors to our valued members. 2015 was a tremendous year of change during which the Board governance structure was reduced from 14 members and 3 VP roles to 12 members and 2 VP roles. Further, four appointed Board members resigned, three of which were filled on an interim basis. Despite the ensuing challenges, I was honoured and privileged to work with all of the 2015 Board members and volunteers. More so, I sincerely appreciate the leadership of Dylan Boudreau and Robin England, who both agreed to take on new VP roles mid year.

I am very grateful for our Board and portfolio volunteers, all of whom have given their time freely throughout the year. Their efforts continually demonstrate how volunteering for the chapter provides a good opportunity to network, learn new skills and potentially advance one's career. Undoubtedly, without the assistance of volunteers, the chapter would not be able to successfully serve its members.

As you know, as of December 1, 2015, the Continuing Certification Requirements (CCR) program (which is the way the PDUs are classified) is changing. The CCR Program was designed to help active PMI certification holders grow and develop with the profession. As the global business environment and project management profession evolves, the program must adapt to provide development of new employer-desired skills. Please continue to read the emails from PMI and bookmark the [CCR updates page](#). For 2016, our Programs will be aligned to the new PDU requirements.

2015 Highlights

Programs

Programs is the number 1 priority that PMI is expected to deliver. Based on survey results, members feedback indicates that the top two priorities are knowledge and networking. The Chapter's programs portfolio for 2015 has delivered an eclectic range of educational and networking events. Lunch and Learns, hosted by many organizations throughout the region, continue to grow in popularity. Further details are provided under the Events section of this report.

The PMP/CAPM Study Group was refreshed with a new program and materials from Passionate PM. The initial pilot was launched in the Winter-Spring session and proved to be a great success. Thanks to the Professional Director Kathryn Duffy who lead the research and coordinated the pilot program that was delivered both in person and remotely. The newly revamped study group is in full swing this fall, hosted at a new location, Nova Scotia Power.

PMI Educational Foundation (PMIEF) offers an annual \$2,500 (USD) scholarship that has been funded via a one time \$50,000 endowment fund from PMI NS in 2009. This year's recipient is Elizabeth McNamara.

The Outreach team, under the directorship of Carolyn Stewart, delivered presentations throughout the year; and more specifically to the Association of Professional Engineers and to the Immigrant Services Association of Nova Scotia. Thanks to Carolyn who met with many of these organizations to promote the value of Project Management.

Our Mentorship program saw another great successful cycle in 2014/2015, which kicked off at Just Us Coffee shop and wrapped up at the City of Halifax municipal offices. Thanks to Barrington Consulting for its continuing support for the Mentorship program. All members should be encouraged to participate in the 2015/2016 program.

Despite our earnest efforts to organize the PMI Golf / Educational Event for September this year, this event was unfortunately cancelled due to low registration. Even so, the work of the Events and Sponsorship Committee members and co-partner ITSM Atlantic must be commended.

Operations

The operations team primarily supports the delivery of all programs and events through marketing and communications, updates to the web site, providing members services, managing volunteers and general administrative support.

Marketing and Communications continues to be very active with regular and focused email notices (eBlasts) in addition to our social media channels.

Thank you Bev Thiessen for her continued support throughout the year. The Board of Directors is delighted with her decision to continue providing administrative support to PMI NS.

Sponsorship

In 2015, the chapter received a combination of financial contributions, prize donations and several offers to host for its events and Board meetings throughout the year.

One of the chapter's key objectives with sponsorship is to engage corporate institutions not only for financial support, but more importantly to provide awareness and general support towards the project management profession. This formula resulted in a win-win relationship.

PMI NS is very grateful to the following sponsors for 2015:

Sponsor Organization	Sponsor Category	Event
Archway Search Consultants	Presenting Sponsor	Full Day Symposium
Gevity	Bronze Sponsor	Full Day Symposium
Concertia Technologies	Presenting Sponsor	Volunteer Appreciation Dinner
Bell Aliant	In Kind	Lunch & Learns, PMP/CAPM Study Group
IBM	In Kind	Lunch & Learn
Nova Scotia Power	In Kind	PMP/CAPM Study Group
HITS - NS	In Kind	Lunch & Learn
Deloitte Touche	In Kind	Lunch & Learn
Ausenco Limited	In Kind	Space for Board Strategy session
International Institute of Learning	In Kind	Printing
Sierra Systems	In Kind	Monthly Board Meetings
Halifax Regional Municipality	In Kind	Monthly Board Meetings
Unisys	In Kind	Prize donations
Randstad	In Kind	Prize donations
Halifax Global	In Kind	Support Annual Survey
CITCO	In Kind	Host PMP Study Group

Sincere thanks to I would like to thank the Sponsorship volunteer team who gave their time freely to support the Board.

Committee Members:

- Vanessa Greer (Chair)
- Kevin Crasta
- Chi Pierre
- Cheryl Dunphy

Appreciating Former Board Members

This year saw the retirement of three long standing board members who have provided countless hours of volunteer effort to the chapter. They are:

- Brenda Fay (2010 - 2014)
- Martha Wilson (2009-2015);and
- Bev White (2008-2015).

In service,

Ron Singer, PMP

President, PMI Nova Scotia Chapter

EXECUTIVE AND PORTFOLIO REPORTS

Programs

Dylan Boudreau - Vice President

I would like to thank the dedicated volunteers that stepped up at each and every event to ensure delivery went smoothly. This year we were able to deliver 15 events which includes our summer and holiday socials and the return of a full day symposium. Due to their popularity there was an increase in the Lunch and Learn format over traditional dinner meetings. Our Lunch and Learns would not be the success they are without the support of the local business community (Bell, Deloitte, HITS-NS, IBM) who has generously provided

space to deliver these sessions. These events continue to be a big draw and we'll continue to expand on their success in the new year and look for new places to hold them.

It was a transition year within PD with the PMP Study Group piloting 3rd party materials over internally developed. The initial pilot was launched with materials from Passionate PM over the winter and proved to be a great success and as such a full rollout was launched for the October group. This fall also saw the move of the Study Group from Canada Post to the Emera building on Lower Water Street. The new location has proved to be a big success with positive feedback from attendees. Space for the 2016 study group is in the process of being finalized and we look forward to announcing it on the website.

Events

Michelle Mercier, PMP - Director

Sandy MacMillan, PMP - Director

The Events committee 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 2015 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 and the core group is listed in the table below. 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, Dylan Boudreau, and Ron Singer.

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

For 2015, the Events Committee was responsible for the delivery of 3 Dinner Meetings, 1 Breakfast Meeting, and 8 Lunch and Learns. We also had a successful full day symposium in September that had great reviews. We partnered with several other Professional organizations to deliver the annual Professional Development Summit (PDS) in April. As

well, this year we hosted another successful Summer Social and will be hosting a PMI Christmas Social in December.

The PMI NS Chapter Events for 2015 are listed below:

DATE	EVENT	SPEAKER	Location
January 21, 2015	Lunch and Learn- State Of Project Management in NS	Ron Singer	Bell Canada
February 25, 2015	Breakfast Meeting – The New Halifax City Library	Judith Hare	Delta Halifax
March 25, 2015	Lunch and Learn –Integrating Project Management with Service Management	Jean Claude Beaudry	Bell Canada
March 25, 2015	Dinner Meeting - Change Management	Wendy Spears	Delta Halifax
April 22, 2015	Lunch and Learn - Job Seekers Series #1 (Resume)	Michelle Murray	Bell Canada
April 29, 2015	Professional Development Summit (PDS) 2014	Various Speakers (hosted with other Organizations)	WTCC
May 20, 2015	Lunch and Learn - Job Seekers Series #2 (Interview)	Craig Coady	HITS-NS
June 18, 2015	Lunch and Learn- Leveraging Project Analytics for Project Success	Rob Carruthers and Drake Alexander Morse	Deloitte
July 15, 2015	PMI Summer Social Event	N/A	Red Stag
September 23, 2015	Dinner Meeting- Livin' Life Large! Simple Actions that Create Success	Taylor Hayden	Quality Inn
September 24, 2015	Full Day Symposium- Team Avatar - Building Online and Onsite Teams	Taylor Hayden	Quality Inn
October 21, 2015	Lunch and Learn - Motivating Your Team, Lessons Learned in the Trenches	Ron Singer	IBM Innovation Center

October 28, 2015	Lunch and Learn - Changes to PM Role and PMP exam	Kathryn Duffy	Bell Canada
Nov 26, 2015	Dinner Meeting - Leader and Project Manager in the military	Major Kris Campbell	Royal Artillery Park
Dec 2, 2015	PMI Christmas Social Event	N/A	Gahan House

We will continue to review feedback, venues and new ideas for events in order to continue to provide a wide variety of high quality events to the PMI members and other participants.

Committee Members:

Sandy MacMillan

Michael Waugh, PMP

Mary McLaren, PMP

Rick Ranay

Professional Development

Kathryn Duffy – Director

PMI Nova Scotia ran a closed pilot PMP/CAPM Study Group session to evaluate new course and participant material and study sequence in preparation for the upcoming new PMP Exam Content Outline (i.e. exam changes). The Board made the decision to acquire new material as resources are not available to be continually revamping our materials every couple of years. One of the significant changes is that the study sequence is now organized by Process Group versus by Knowledge Area so information flows in a highly understandable and easy to retain manner. Feedback on the new study sequence from both participants and facilitators has been extremely positive.

Study group participants are now provided with a paper copy of the PMPBOK® Guide, 5th Edition and a Student Courseware bundle as part of their registration fee. The Student Courseware bundle includes a Student Coursebook, a Student Workbook with weekly exercises and over 600 PMP exam style questions, and a Quick Reference Study Guide.

We also now provide a PMP/CAPM Exam Readiness Assessment – a 200 question full practice exam. Following completion participants will receive a report that gives their overall

score and a breakdown by PMBoK process areas. This will advise them as to whether they are likely to pass the exam immediately or need additional self-study.

The price of the study group was increased to account for the additional cost of the study materials and to reflect the additional value provided.

Due to the upcoming PDU changes, facilitators will max out their PDUs in the giving back category after facilitating only 2.5 sessions in a three year period. We have been focusing on initiatives to expand our facilitator base through networking and informal group orientation socials for current and prospective facilitators. To further support our facilitators, each facilitator is provided with an instructor courseware book, session slides with an additional 40-50 PMP-style question slides with explanations provided in the slide notes, an orientation session (group or individual). We are currently working on expanding our Facilitator Welcome Package with tips from existing facilitators.

In October we held a Lunch n Learn on the upcoming PMP Content Outline Changes and the evolving role of a Project Manager which was very well received.

A Special Thanks to Nova Scotia Power, Bell Aliant, Citco, and Canada Post for generously donating classroom space for our study group sessions this year.

Volunteers:

Alan Barnhill, PMP

Tim Dove

Lianne Giswold, PMP

Chris Henkelmann, PMP

Peter Hope, PMP

Angela Kerr, PMP

Catherine Lane, PMP

Tricia MacLeod, PMP

Micheline Mackay, PMP

Frank McKinnon

Rhonda McKnight, PMP

Chris Mitchell, PMP

Tim Peach, PMP

Steven Peever

Daren Spinney, PMP

Mentorship Program

Carolyn Stewart – Program Chair

The 2014-2015 cycle of the PMI NS Mentorship Program ran from October 2014 and concluded in May of 2015. There were 20 participants in the program this cycle. A wrap up session was held on May 28th 2015 for the participants, solicited feedback was presented and discussed. Overall the program was deemed a success and several participants indicated their desire to continue with the program in 2015-2016. A call out for participants for 2015-2016 has been communicated, in order to align the program with the PMI NS fiscal year, the tentative start date for the next program cycle will most likely be early January 2016.

The Program Committee updated all program collateral prior to the 2014-2015 kick-off, which has brought the process and documentation to a new and exciting level. The committee is committed to emailing participants to help with conversation topics, to seek feedback, and to encourage all program participants to join the PMI NS Mentorship LinkedIn Group for discussion sharing purposes.

PMI NS wishes to thank Barrington Consulting again for their generous sponsorship for this valuable Chapter program.

Committee Members:

Selicia Douglas

Brenda Fay

Jennifer Dore

Outreach

Carolyn Stewart - Director

Introduced PMI NS to Krista Williams, CEO of NS Junior Achievement, with the intent of a possible collaboration between our organizations. At the time of the conversations, Ms. Williams did not think that PMI NS could help her advance her 2015 programs.

Presented an overview of the PMI Certifications to Engineers Nova Scotia in September 2015 at their annual professional summit in Halifax. Approximately 50 engineers were in attendance for the session and participated in the open Q&A segment of the presentation.

Operations

Robin England - Vice President

I want to take this opportunity to thank our dedicated volunteers within this portfolio for the substantial dedication and difference they have made for PMI NS over the past year: **Selicia Douglas, Amy Wilson, Li Lei, Issac Joseph, Joey Duguay, Lyli Ospino, Ruth Blades, Sarah Hallam, Cameron Deacoff, Stephen Doiron, Heather Fraser, Bev Thiessen** and **Lesley Wang**. Thank you all!

The primary focus of the operational division of the PMI NS chapter is the efficient delivery of operational services to the chapter. These services including overall administration, membership services, technology/website, communications & marketing, and volunteer management.

In 2015 part time administration for chapter was performed initially by Liona Jollota, and then returned to **Bev Thiessen** in addition to her volunteer role. Bev's primary role is supporting the Board of Directors and she is responsible for routing voice mail messages and email messages to the correct board member or committee member. Thank you Bev for your ongoing efforts and dedication to the Chapter.

Marketing & Communications

Amy Wilson - Director

In 2015 Marketing & Communications most notably advanced its social media and eblast complement with addition of a Social Media Coordinator (Amy Wilson - then Director) and Eblast Coordinator (Issac Joseph). The portfolio merged a formal alignment with Events and Professional Development including fostering of an Events Marketing Coordinator (Li Lei) out of the Marketing & Communication portfolio to ensure full stream marketing delivery for interested members. PMI Nova Scotia's new brochure was realized thanks to this team, including PM efforts, volunteer graphic designer (Lesley Wang), and generous print sponsorship. In fall 2015, the portfolio expanded to include website content coordination. We are looking forward to this exciting chapter in addition to more new developments in Marketing & Communications for PMI NS. We are always looking for great new volunteers to join our team. In 2016 we are looking to find a new Social Media Coordinator and Copywriter (short and long copy). Feel free to reach us anytime at communications@pmins.ca even if just to let us know how we are doing.

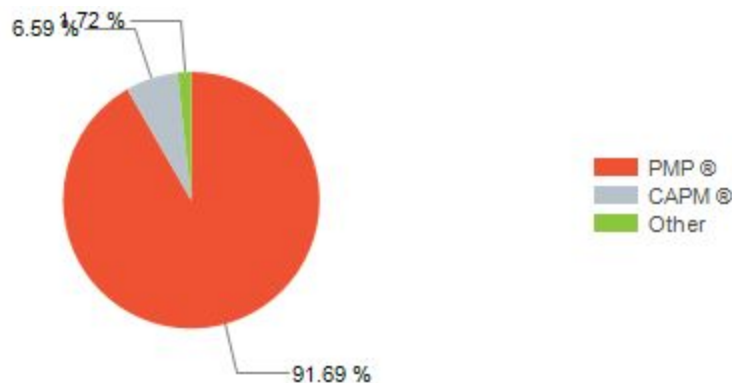
Membership and Volunteers

Selicia Douglas - Director

In 2015, the chapter welcomed 108 new members, totaling 515 at the end of October 2015. Even so, there was a small decrease of 16 members in 2015.

For the reporting period, the number of members with their Project Management Professional (PMP)® designation decreased by 1. There was no change in the number of members with other certifications within the chapter.

As illustrated below, 349 members hold a PMI credential as follows: PMP®: 320; CAPM®:23; PMI-ACP®: 4; PMI-SP®: 1; and PMI-RMP®: 1



Following the Annual Strategic Planning Session held in January 2015, a committee was formed comprising five (5) volunteers, namely: **Ruth Blades, Heather Fraser, Cameron Deacoff, Stephen Doiron** and **Sarah Hallam**. Consulting input was also received from Robin England, Wendy Greif and Lyli Ospino. In 2015, the Committee's efforts were geared towards:

- A. Improving communication on the benefits and value of being a PMI/PMI NS member by successfully completing and disseminating a **Member Introduction and Benefits Package**
- B. Streamlining processes for managing current volunteers and for identifying volunteers. This was accomplished by drafting a **Volunteer Management Framework** outlining the activities and guidelines for each step of the volunteer cycle including Recruitment, Placement Orientation, Recognition and Evaluation. Migrating the recruitment of volunteers via PMI's Volunteer Relationship Management System (VRMS) is continuing.

- C. Directing and positioning volunteers within various chapter portfolios as per the recently compiled **Portfolio & Volunteer Roles** document.
- D. Expanding chapter recognition opportunities for volunteers by developing a **Volunteer Recognition and Awards Program**. The expanded program was launched during the week of April 12-18, 2015 (National Volunteer Week), with general acknowledgement and spotlight recognition. Essentially Spotlight Recognition highlights volunteers whose accomplishments and contributions make a difference to the Chapter in three categories - Trailblazer, Team Builder and Best Supporter. Spotlights were done at the end of March and June, 2015 celebrating the service of volunteers Amy Wilson, Michael Waugh, Michelle Forest, Lianne Giswold, and Vanessa Greer.
- E. Drafting a **Member Engagement/Retention Plan**, which will span four (4) components including: Welcoming, Connecting, Engaging and Reviewing a NEW MEMBER's experience. It is anticipated that this plan will assist in charting first year of membership, which is critical to member retention.

Volunteers are essential to the Chapter's success and in 2015, approximately 58 volunteers, including Board of Directors, volunteered their time, expertise and energy in service to the Chapter. Interested in volunteering with the Chapter? - check out available opportunities by searching advertisements on VRMS or by expressing an interest to the Director at membership@pmins.ca.

Technology

The technology platforms of the chapter remained unchanged in 2015 with Proteon still hosting the website and integration with PMI Global, Google still hosting email and collaboration and WebEx being the platform of choice for study group. It has been 2 years since the last release upgrade of the website so discussions are currently being held with Proteon to evaluate new features within the latest version. Should a decision be made to go ahead on this, a launch would happen in the 2nd half of 2016 along with a reorganization and refresh of site content.

Treasurer

Drake Morse - Treasurer

It feels like yesterday that I was just a committee member providing policy drafts and recommendations for updates of the chart of accounts or how process our finances. As my predecessor has helped bring us closer to cleaning up our finances, much of my year was continuing that mission as well as bringing on efficiencies for the future. At current, 2013 statements are in final review and 2014 is being audited to be completed by early 2015. With our new finance system we will be able to streamline the review/audit process and complete 2015 audit in 2016.

With the departure of bookkeeper, Herb, and losing his replacement mid-year much of the year was acting in both roles, bookkeeper and treasurer, to deliver the Finance requirements and processing as well as monitoring budget for the year. With our fantastic team of board members and volunteers we were able to stay close to our budget and are projected to break even for the year.

With our new finance system in place and the continued team efforts from the board to help optimize our internal procedures I am excited to operate in this support role to support any new initiatives that the board may bring.

Again, thank you to the board and our volunteers for providing such great work and supporting me in my first year as Treasurer.