

Annual Report 2022

December 2022



Project
Management
Institute®
Nova Scotia

PMI Nova Scotia Chapter

Mailing Address:

PO Box 34504, Halifax, B3J 3J8

Phone: 902.423.1764 (One PMI)

TABLE OF CONTENTS

Table of Contents	2
Highlights And President’s Annual Message	3
Executive and Portfolio Reports	4
Programs	4
Events	4
Professional Development	6
Operations	6
Communications	7
Marketing	7
Membership and Volunteers	8
Technology	9
Treasurer	9
APPENDIX A: FINANCIAL STATEMENTS	11
2021 Approved Financial Statements	11
2022 YTD Profit & Loss Report	11

APPENDIX A: FINANCIAL STATEMENTS

2021 Approved Financial Statements

2022 YTD Profit & Loss Report

HIGHLIGHTS AND PRESIDENT'S ANNUAL MESSAGE

It is my pleasure to present the 2022 Annual Report on behalf of PMI Nova Scotia Chapter Board of Directors to our valued members.

2022 has been an optimistic year with Covid-19 restrictions starting to ease and all of us working towards getting back to “normal”. As we started to see Covid-19 restrictions ease our chapter looked to offer a combination of virtual and in-person events to our members and we will continue to offer this combination for the foreseeable future.

Our new website experience was launched at the end of 2021. We've spent time in 2022 learning how to best use our new website and will continue to make improvements over time. I would like to thank current and past volunteers who continue to improve our website.

This year, our chapter partnered with the PMI Montreal Chapter to offer Virtual Project Management Professional (PMP®) Exam Preparation Courses. The PMI Montreal Chapter is a PMI Premier Authorized Training Partner (ATP).

As I close my tenure as President of the PMI Nova Scotia Chapter Board of Directors, I wish to thank our hardworking Board of Directors, Volunteers, our Executive Team, and all our Chapter Members. Volunteering with PMI Nova Scotia has provided me with so many opportunities and I encourage each of you to get involved.

Thank you,
Vanessa Greer

EXECUTIVE AND PORTFOLIO REPORTS

Programs

Uzo Nnamdi – Vice President

Events

Tanya Dent – Director

Our events year was filled with a variety of events and networking opportunities. As COVID started to relax in the environment we started to welcome some events back to in person while also continuing with virtual.

We held 13 events. We saw great turnout for virtual events however the in person learning events were mediocre; in person networking events were well attended. Unfortunately, there were 4 events that required cancellation. Completed events are listed below:

Topic	Location	Speaker	Date
Servant Leadership	Virtual	Nitasha Nijhawan	January 28, 2022
Managing Rehabilitation Projects with Unknown Final Scopes	Virtual	Daniel Sanchez	March 1, 2022
Women in Project Management - A Panel Discussion	Virtual	Oshrit Harel, Ifeyinwa Anaele, Pallavi Sen, Melanie Myers, Diane Ingram, Tanya Dent	March 8, 2022
The Roundtable Series (Book/Video/Article Reviews)	Virtual	No speaker	March 23, 2022
Cogswell Interchange Project	Virtual	Donna Davis	April 28, 2022
VAN Event	Coldstream Distillery Dartmouth	David Barrett	May 25, 2022
David Barrett - From Good Project Manager to Great Leader	Chocolate Lake	David Barrett	May 26, 2022
Unconscious Bias with Carol Dayment	Virtual	Carol Dayment	June 16, 2022
Project Bites - David Barrett	Virtual	David Barrett	June 28, 2022

Summer Social - Harbour Cruise	Halifax Waterfront	No Speaker	July 12, 2022
Remote Management of Construction Project - Article Review	Halifax Library	No Speaker	September 8, 2022
Women in Project Management - Coffee & Conversation	The Garden, Halifax	No Speaker	September 28, 2022
Pursuit of Value	Virtual	Chris Heck	November 30, 2022
AGM	Buddy's Pool Hall Sackville	No Speaker	December 9, 2022
Holiday Social	Buddy's Pool Hall Sackville	No Speaker	December 9 2002

Our Volunteer Appreciation Night (VAN) in June saw a significant turnout (30+) and we awarded volunteers with a customized PMI Volunteer mug and also announced a volunteer of the year award to Stefanie DeYoung.

We saw all but one of our volunteers stay with our group with an average of 6-7 volunteers throughout the year, with one moving out of province and recently recruiting one in November. During the transition to the new Director of Events, we will onboard a couple of new volunteers. Two of our volunteers manage the back end (emails, zoom, event creation) while the others help to facilitate the online and in person events. Two of our volunteers are moving to Board positions therefore as noted above we will be recruiting a couple of additional volunteers with a robust plan for 2023 already underway.

Professional Development

Mahbubur Rahman & Jordan Dorey – Director

The Professional Development team started the year with a partnership with PMI Toronto to deliver PMP prep course. But in mid-year PMI Toronto discontinued their PMP course programs and we started a partnership with PMI Montreal which will continue in the next year.

The Mentorship Program Started in June 2022 and will run until December 2022. We paired 12 proteges with 12 Mentors to enhance effectiveness. A mentorship kick off event held virtually on June 15. Mentorship mid term check in event was held in person on September 27 at Halifax Central Library.

The Professional Development team has responded to questions and queries from our members and non members throughout the year regarding PMP certification, PMP prep course and other areas of professional development.

The Professional Development team is grateful to Mentorship Coordinator Kirk Macdonald, Mentorship volunteer Jazmin Berumen and all the Mentors without their dedication we would not be able to operate.

Operations

Jeffrey Bonus – Vice President

This past year we split the Communications & Marketing role into two separate roles so that we can put more focus on our Marketing effort. We welcomed Pallavi Sen as our first Director of Marketing.

Liz Charnley took over the Director of Communications from Gail Okoh. Andrew Clavette took over the Director of Membership and Volunteers from Richard Harrison who moved into the Treasurer role. Angus Swantee continued in his role as Director of Technology.

A special shout out to Bev Thiessen our administrative cornerstone for almost 20 years. She has decided to step away from this role in June 2022. Her absence has already been felt as we continued without her this Fall. We wish her all the best!

Communications

Liz Charnley – Director

In 2022, Communications became a separate function after previously being combined with Marketing. At present we have two volunteers in addition to the Director and are actively recruiting for an eBlast Coordinator. 2022 saw increasing numbers of in person events, which were communicated via eBlasts and social media channels. This year also saw our social media presence increase with increased use of “socials” to communicate information, which resulted in an uptick of followers. The new website is up and running and the team is now using that medium to communicate events to our membership. We’ve recently added a Content Creator to the team, who is actively researching different ways we could further engage with our membership. Our goal is to end the year with a more robust website (in terms of project management information shared) and plans to further increase the value to members.

Marketing

Pallavi Yadav Sen – Director

The PMINS carved out a separate vertical for Marketing since January 1, 2022. This was done to bring more focus on marketing activities of the Chapter and enhance visibility. Pallavi Sen, Director, PMINS has been leading the Marketing function along with Mohammad Akram and Minal Mahadik as team volunteers.

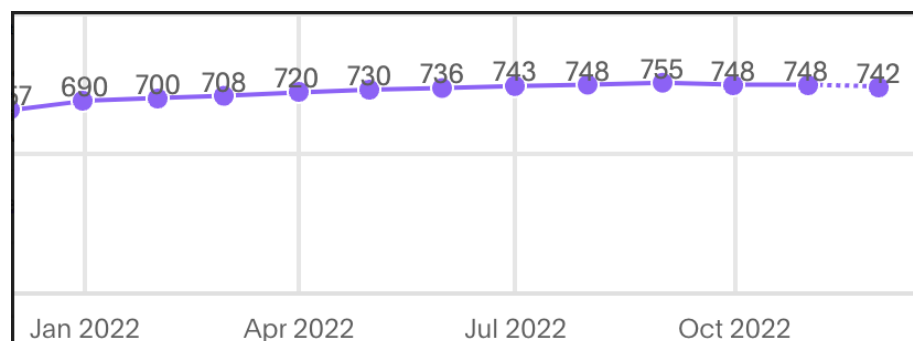
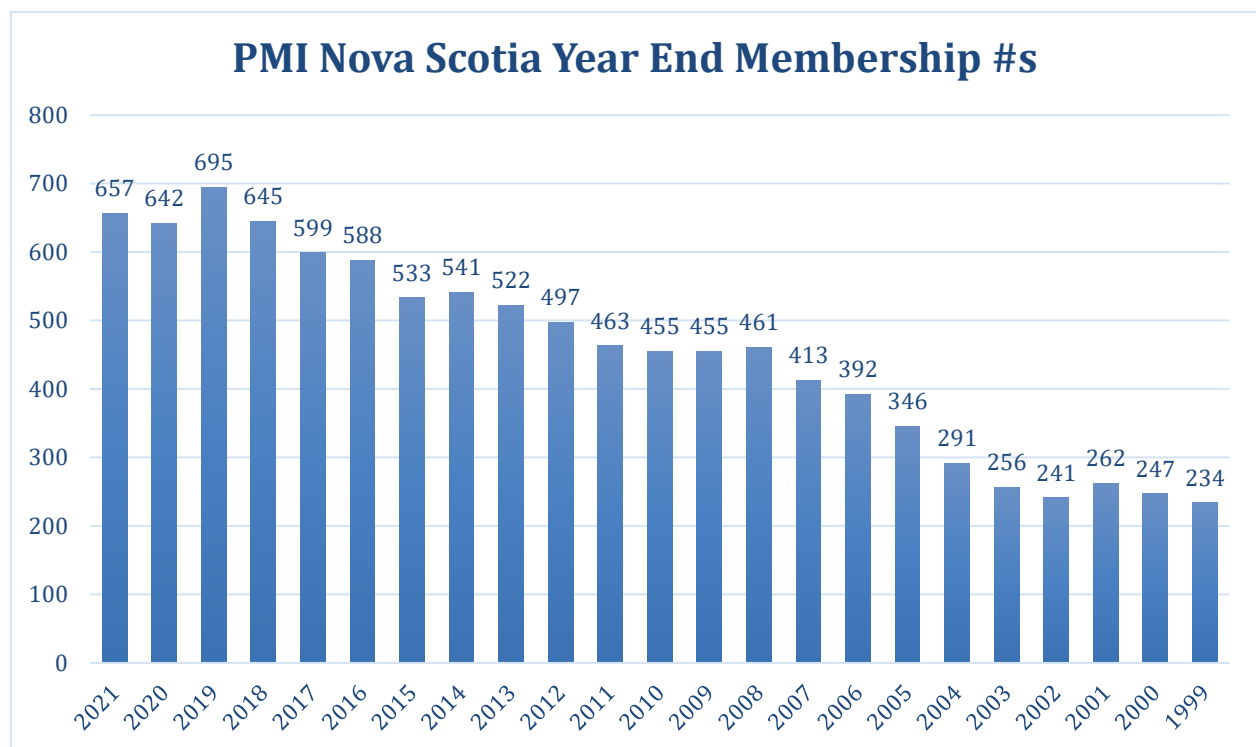
One of the first tasks undertaken by the team was to create a PMINS corporate slide deck. This will now be used for chapter meetings. The second priority was to draft a Marketing Strategy on which work is in progress, A draft has been prepared, which will incorporate the results of an internal working session on SWOT Analysis and then reviewed by the Board. The final report is expected to be complete by Dec 2022. It will include recommendations for strengthening the Chapter’s Marketing.

The team conducted a review of chapter website. Areas for strengthening the Website have been identified. Work on making the website content more appealing will continue in the remaining part of 2022 and in 2023.

Membership and Volunteers

Andrew Clavette – Director

Membership numbers took a big step this year coming out of a small downturn following unforeseen circumstances due to the COVID pandemic. Membership numbers rose from 657 members at the near end of 2021 to 690 members to start 2022. Through a large push in events driven by the events team and strategic marketing utilizing various social media platforms, most importantly LinkedIn, the total membership numbers reached a high of 755 chapter members in September of 2022. Currently the membership numbers hold steady at 742 members to close out the year which amounts to 52 more members then when the year started.



From a reporting standpoint, PMI has moved away from the previously used reporting tool CRS to the new "ThoughtSpot" reporting tool which is more user friendly and has better and more dynamic reporting capabilities and visibility to trends and analysis. This exciting new launch will help the PMINS chapter board to narrow focus on recruitment trends and also see the impact events and marketing/communications has on overall numbers in memberships and volunteers.

Volunteer activity saw a large increase in 2022 as in person events increased with COVID restrictions being pulled back. A big part of this increase came from the Events, Marketing, Communications and Technical teams, with the Events team taking the biggest jump in this area.

Technology

Angus Swantee – Director

The major project completed this year was migration of our chapter website to a new Content Management System platform. This system provides opportunities to add a modern 'look' to the site, streamlined support, improved ease of use for content updates, and distributed management to enable more accurate information to be added in a quicker time frame.

The board members and the chapter volunteers who maintain the site have spent time becoming familiar with the new features and are now in the process of determining the best approaches to apply improvements. Watch for the many updates in appearance and functionality that will be implemented in the site during the next year.

The chapter has also been working towards providing more electronic services to our members and are evaluating the equipment and software necessary to offer hybrid events more frequently. Through this, we aim to increase the reach and accessibility of the chapter offerings to all members.

Treasurer

Richard Harrison – Treasurer

This was my first year in the position of treasurer. The majority of my activity has related to:

- a. "On boarding"
- b. Managing key transitions - e.g., bank account signatories, new credit card etc.

"On boarding" has taken a long time to complete. There are many operations that the Treasurer needs to perform and attempting to cover all of those in one or two on-boarding sessions at the start of the

year is impractical. I now have awareness and understanding of the ad-hoc, monthly, quarterly, and annual operations that need to be performed. Quarterly HST return filing had been overlooked by the previous Treasurer, and I was not aware of the requirement until Q3 this year. We are now up to date with filing, but still need to pay CRA the balance owing. We will do so once the balance is confirmed by CRA.

The process of changing signatories on the bank account and arranging a new credit card was mismanaged by RBC. The changes were eventually put in place in Q3. RBC is aware of our dissatisfaction with their performance.

Finance performance

Note: all statements on 2022 performance are based on the unaudited accounts and should not be taken as an approved statement of PMINS' position. This will be provided through the audit of the full 2022 year which will be provided at the 2023 AGM.

The year-to-date P&L is as follows:

	Year to date (end Oct 2022)	2022 Annual budget
Income	\$32,903.65	\$48,450.00
Cost of Goods sold	\$5,610.33	\$15,966.11
Gross Profit	\$27,293.32	\$30,483.89
Expenses	\$15,150.68	\$27,370.75
Net Income	\$12,142.64	\$3,113.14

During the year, we have taken advantage of financial support that has been made available by PMI Global to all chapters in good standing, to cover technology and event costs.

Please refer to the separate report from Lyle Tilley Davidson for confirmation of our approved 2021 financial position.

2023

Provisional priority actions for 2023 include:

- Prepare 2023 Budget
- Perform all ad-hoc, monthly, quarterly, and annual operations
- On board a volunteer bookkeeper to support routine operations
- Provide support (as required) to the endowment being established with NSCC

- Continue to refine our expense claim process

APPENDIX A: FINANCIAL STATEMENTS

2021 Approved Financial Statements

2022 YTD Profit & Loss Report