

# Annual Report 2023



**Project**  
Management  
Institute®  
Nova Scotia

PMI Nova Scotia Chapter

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## HIGHLIGHTS AND PRESIDENT'S ANNUAL MESSAGE

It is my pleasure to present the 2023 Annual Report on behalf of the PMI Nova Scotia Board Members to our valued chapter members.

Last year we made the decision to move this year's Annual General Meeting (AGM) from Q4 to Q2. This allows us to report the financial results from the previous year to you sooner. With the last AGM being held in December 2022, and this being a transition year, this report will focus on activity from January 1<sup>st</sup> to April 30<sup>th</sup>, 2023.

We are excited to be celebrating our 25th anniversary this year and planning is underway for a celebration event to be held this fall. More details to come over the coming months.

To start the year, we completed our annual planning session in January and the Board was able to identify some key areas for the chapter to focus on after completing a SWOC analysis. Some areas we are focusing on are to improve publicity of events, improve member website experience, build campus activation and alliances (University / Colleges), build partnerships and sponsorships; add Social Good events; explore the feasibility of hosting a PMINS annual professional conference.

This year we developed new Chapter Vision and Mission Statements.

### **Vision Statement**

To be a vibrant chapter that continues to be the project management hub for industries and communities in Nova Scotia and the benchmark for other PMI Chapters.

### **Mission Statement**

Empowering individuals to fulfill their potential by promoting Project Management practices as a collaborative chapter.

I am very grateful for my Board members. We have a very diverse group this year and they each bring their unique gifts and talents to be Board. I am excited to continue to collaborate with them and to build upon the foundation our previous leaders have built.

Thank you to our volunteers! Without you the chapter would not be what it is today.

If you are interested in volunteering please reach out to our volunteer director at [volunteers@pmins.ca](mailto:volunteers@pmins.ca) or visit the PMI Volunteer website <https://volunteer.pmi.org/>

I am very excited for the remainder of the events and offerings we have planned for 2023. I look forward to seeing you at these events.

Thank you,  
Jeffrey Bonus

## EXECUTIVE AND PORTFOLIO REPORTS

### Programs

#### Mahbubur Rahman – Vice President

Program team this year has three Directors and all of them started their Board position in January 2023. Stefanie DeYoung as Director of Events, Max Sulaimanov as Director of Professional Development and Yemi Olaniyi as Director of Sponsorship and Partnerships.

Continuing with the Programming from 2022, the first few months of 2023 were very busy with multiple online and in person events, Mentorship and other programs. PMI NS also partnered with four other professional organizations to organize the PD Summit in April 2023. We are looking forward to celebrating the 25th anniversary of the chapter in the upcoming Fall.

### Events

#### Stefanie DeYoung – Director

This year will include a variety of events and networking opportunities. We are continuing to have a mix of in-person and virtual events.

We have held four events so far in 2023, have 6 planned and scheduled and 4 planned. We saw a great turnout for virtual and in-person events with the first networking event of the year selling out in four hours and had a 15-person waitlist!

#### 2023 Events are listed below:

Topic	Location	Speaker	Date
First Networking Event of the Year	Lion’s Head, Halifax	N/A	Feb 17, 2023
Women in Project Management	The Brewery by Quinn’s, Halifax	N/A	Mar 8, 2023
Project Bites Lunch and Learn	Virtual	<a href="#">David Barrett</a>	Mar 13, 2023
Immigration Panel	Virtual	<a href="#">Javier Ojeda</a> , Jazmin Caloca, Kena Osemwekha, Nadia Morash	Apr 13, 2023
<b>Planned and Scheduled Events for Remainder of 2023</b>	<b>Location</b>	<b>Speaker</b>	<b>Date</b>

Speed Networking & AGM	Halifax Central Library	N/A	May 2, 2023
Lunch & Learn - Change Curve	Virtual	Amber McMillan	May 18, 2023
Great NS Pick Me Up	Halifax Commons	N/A	Jun 3, 2023
Lunch and Learn - Psychological Safety	Virtual	Kiron Bondale	Jun 8, 2023
Volunteer Appreciation Night	Garrison Brewery, Halifax	N/A	Jun 22, 2023
Taking our PM careers to the next level	Virtual	<a href="#">David Barrett</a>	Sep 27, 2023
<b>Planned Events for Remainder of 2023</b>			
Summer Social	TBD		
Hike	TBD		
L&L with Courtney Pyne, a traffic and transportation engineer with WSP)	TBD		
Holiday Social	TBD		

The events team added four 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.

The 25th anniversary celebration planning is in the works. Stay tuned for detailed information for a fall date and an exciting event planned. We would love to see you there.

## Professional Development

### Max-Nursultan Sulaimanov – Director

The Professional Development team renewed the partnership with PMI Montreal to deliver PMP preparation courses to our members for 2023. A working group is also exploring the feasibility of becoming an Authorized Training Partner (ATP) and will submit a report to the Board. Nitasha Nijhawan is leading the working group.

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. Patricia Dauphinee has taken on the role of answering questions related to professional development.

The Mentorship team started working towards the Mentorship Program in January 2023. The first cycle of the Mentorship program was launched in March 2023 and will run until June 2023. We paired 30 proteges with 30 Mentors which is the largest group in PMI NS history. A mentorship kickoff event was held in person on March 21 at Halifax Central Library.

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

### **Tanya Dent – Vice President**

During the first quarter of 2023 we have five teams within our Operations Group.

- Communications lead by Liz Charnley Mason - Year 2/2
- Marketing lead by Pallavi Sen - Year 2/2
- Technology lead by Adil - Year 1/2
- Administration lead by Akram - Year 1/2
- Members & Volunteers (new appointed) now being led by Priyanka Gautaum - Year 1/1

Adil took over Technology from Angus Swantee. Priyanka Gautaum took over the Director of Membership and Volunteers from Minal Mahadik. We also introduced a new role, Director of Administration. We are also exploring the opportunity to separate Membership & Volunteers into their own respective teams.

## Communications

### **Liz Charnley – Director**

In 2023, the Communications team is working to mature our online presence. At the current time we have two volunteers (Content Creator & Social Media Lead) in addition to the Director. The first quarter of 2023 continues to see an increase of in-person events, which are communicated via weekly newsletters and social media channels. Our social media presence continues to increase, primarily on LinkedIn; therefore, the team has been gearing most posts towards this platform as well as Facebook.

The Communications Team continues to work to increase our social media presence by regular use of social media channels, regular blog posts and regular newsletters. The Communications and Marketing teams are working together to improve the look and feel of communications and create a more professional image.

Our goal is to continue improving our social media presence by increased posts, contribute to a more robust website and further increase valuable project management information to members.

## Marketing

### **Pallavi Yadav Sen – Director**

Two new volunteers joined the Marketing team in 2023, Ali Muree & Rasheed Oladipupo. The Marketing team worked collaboratively with the Events team to support the events. Work is underway on organizing the Chapter's 25<sup>th</sup> Anniversary. A consistent branding for publicity is being strived for with the Marketing and Communications team working together.

To shape the Chapter's Marketing Strategy the Board met in-person for a SWOC session on January 21, 2023. The high priority areas that emerged for opportunity were PMINS Annual Conference, Social Good Events and University alliances. The top 3 challenges identified were difficulty in offering PMP exam preparation courses, limited connection with other professional groups & becoming a strategic Board in view of the day-to-day operations.

The Marketing priority themes for the year are improving the Chapter's website, tracking social media metrics and exploring the feasibility for our own PMINS Annual Conference in Fall 2024.

## Membership and Volunteers

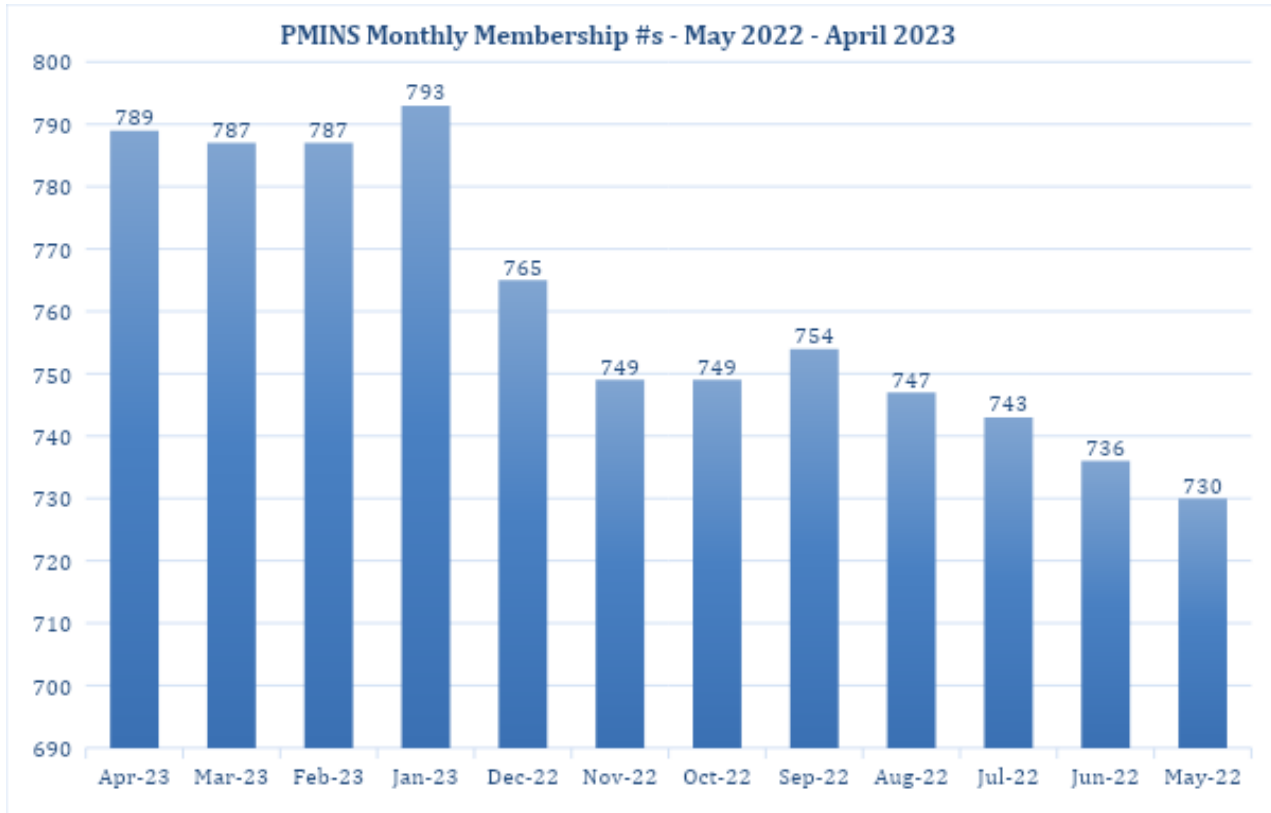
### Priyanka Gautaum – Director

Membership numbers took a big step this year coming out of a downturn following unforeseen circumstances due to the COVID pandemic. Membership numbers are continuing to rise and currently sit at 789 members as of April 30. We started the year with 765 members.

**PMI Nova Scotia Year End Membership #s**







### Member Credential Count Summary

Credential	Credential Count
PMP ®	538
CAPM ®	38
PMI-ACP ®	18
PMI-RMP ®	8
PMI-PBA	7
DASM	6
OTF	3
AH-MC	3
CD-MC	2
PgMP	2
AM-MC	2
CDBA	1
ECC	1
BETI	1
PMI-SP ®	1
DASSM	1
VSM	1
<b>Total</b>	<b>633</b>

## PMI Certifications

<p><b>0-3 YEARS EXPERIENCE</b> NEW TO PROJECTS</p>	<p><b>PMI Project Management Ready™</b> <a href="#">View &gt;</a></p>	<p><b>CAPM®</b> Certified Associate in Project Management <a href="#">View &gt;</a></p>	<p><b>PMI-ACP®</b> PMI Agile Certified Practitioner <a href="#">View &gt;</a></p>	<p><b>DASM™</b> Disciplined Agile Scrum Master <a href="#">View &gt;</a></p>	<p><b>DASSM™</b> Disciplined Agile Senior Scrum Master <a href="#">View &gt;</a></p>			
<p><b>3+ YEARS EXPERIENCE</b> SKILLED PRACTITIONER</p>	<p><b>PMP®</b> Project Management Professional <a href="#">View &gt;</a></p>	<p><b>PMI-PBA®</b> PMI Professional in Business Analysis <a href="#">View &gt;</a></p>	<p><b>DAVSC™</b> Disciplined Agile Value Stream Consultant <a href="#">View &gt;</a></p>	<p><b>DAC™</b> Disciplined Agile Coach <a href="#">View &gt;</a></p>				
<p><b>SPECIALIZATION</b></p>	<p><b>PMI-RMP®</b> PMI Risk Management Professional <a href="#">View &gt;</a></p>	<p><b>PMI-SP®</b> PMI Scheduling Professional <a href="#">View &gt;</a></p>	<p><b>AHPP™</b> Agile Hybrid Project Pro™ <a href="#">View &gt;</a></p>	<p><b>AM-MC</b> Agile Metrics Micro-Credential <a href="#">View &gt;</a></p>	<p><b>CD-P</b> Citizen Developer Practitioner <a href="#">View &gt;</a></p>	<p><b>CDBA</b> Citizen Developer Business Architect <a href="#">View &gt;</a></p>	<p><b>Built Environment Project Communication Pro</b> <a href="#">View &gt;</a></p>	<p><b>OTF</b> Organizational Transformation Foundation <a href="#">View &gt;</a></p>
<p><b>8+ YEARS EXPERIENCE</b> SENIOR LEVEL PRACTITIONER</p>	<p><b>PgMP®</b> Program Management Professional <a href="#">View &gt;</a></p>	<p><b>PfMP®</b> Portfolio Management Professional <a href="#">View &gt;</a></p>						

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 continues to be popular in 2023 as events increase with no COVID restrictions remaining.

## Technology

### **Adil Saiyed – Director**

As this has been a transition period, significant time was invested in learning and familiarizing with the new environment, processes and functional roles.

Also, with new members and volunteers joining, a lot of processes had to be completed such as new Board members' profile creations, new email ids creation, Website access rights management and Group email access. Ongoing member queries such as chapter login issues, renewal issues etc. were successfully managed. Updated the website interface by adding event banners on the landing page as part of the website improvement plan.

During this term we hired a new Technology Support Volunteer (Yamin Aye) to manage basic technical queries.

Keeping in mind the changing post-Covid ecosystem and to increase the reach, we now have identified a technology vendor for possibly making future events go hybrid, with live webcasting on our website. We also partnered with Saint Mary's University to secure a technology enabled meeting room space for conducting hybrid meetings in order to maximize participation.

## Treasurer

### Richard Harrison – Treasurer

2023 is my second year in the position of Treasurer. The majority of my activity so far this year has related to:

1. Bookkeeping
2. Budget setting
3. Supporting the setup of the PMINS Scholarship endowment
4. Supporting the audit of 2022 financials

The above activities have gone as planned, and there are no issues to report.

Given that 2023 is the first full year of “normal business” since the pandemic, the Executive opted to invest and ensure that board members have opportunities to attend at least one of the PMI North America Leadership Institute Meeting or the combined Region 2 / Region 3 conferences over the next two years.

The summary of the 2023 budget that was approved by the board in March 2023 is as follows:

	<b>2023 Annual budget</b>
Income	\$48,092.50
Cost of Goods sold	\$27,125.95
Gross Profit	\$20,966.56
Expenses	\$47,653.97
Net Income	\$(26,687.42)

The costs of goods sold figure includes provision for the planned 25th anniversary event. The expenses figure reflects the investment being made in the board through conference attendance. The figures above also include reimbursements for technology and conference expenses that will be met by PMI.

There are two main activities planned for the rest of 2023:

1. Performing all Treasurer / Finance responsibilities
2. Recruiting and onboarding a volunteer bookkeeper. This role will provide support to me in the Treasurer role, as well as strengthening our internal controls and segregation of duties.

Please refer to the separate report from Lyle Tilley Davidson for confirmation of our approved 2022 financial position.

## APPENDIX A: FINANCIAL STATEMENTS

### 2022 Approved Financial Statements