

# 2021 ANNUAL REPORT

Board of Directors Discussion and Analysis

**PMI MANITOBA CONFIDENTIAL & PROPRIETARY WARNING**

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# PROJECT MANAGEMENT INSTITUTE

## MANITOBA CHAPTER

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## PRESIDENT'S MESSAGE

I cannot believe that almost two years have passed since I started serving as president and when I look back and reflect on all the challenges and successes that we went through, I see that lots have changed and achieved since.

We've reformed many of our practices, events and reshaped many of our partnerships throughout the past year and a half. One thing to note, we were not shy to introduce changes, embrace new ideas and look from different angles.

One of the reforms we implemented was the Director-at-Large concept which was approved in the March 2020 approved By-laws. This was another success as the board quickly self-organized the board functions and strategic projects within 4 weeks following the 2021 Annual General Meeting. The board showed a great team spirit in collaborating together to better serve our members and... That was evident in our metrics.

2021 specifically was a great growth year for PMI Manitoba; we finished the year not only recovering from COVID-19 membership attrition but with membership growth nearly hitting our original pre-COVID objective of 1,000 members by only 13 members. Our retention has significantly improved to hit 74% up from 68% and our overall member satisfaction grew by 7 points as compared to last year. Our financial reform together with savings from pivoting to virtual events resulted in a very strong position where we finished 2021 with another record of net surplus (\$50,518) the board decided to leverage as future contingency funds.

With our commitment to the safety of our community and to follow the provincial health guidelines, we continued to offer our events virtually despite our plans for many in-person events in 2021. We leveraged our strong financial position to offer events ranging from low cost to few members-free events with aim on greater caliber of speakers and more diverse topics relevant to the industry.

Despite all challenges we faced in 2021, we managed to pull a successful Reignite Virtual Conference which offered great learning events to both members and non-members. And all our board meetings and strategic planning sessions were conducted virtually.

Building on the successes and challenges in 2021 and to support PMI Global vision "PMI 4.0", our 2022 plan was anchored around creating more value to our membership and focusing on serving the greater good in our society. We will continue to serve our members with PDU learning opportunities, networking and social events "as allowed". We hope to be able to return to in-person events soon. I look forward to supporting the new president and the new board as they carry the torch to focus on growing our membership and bringing more value to our members.

Finally, I would like to thank our board members and our volunteers for their hard work and dedication, they showed resilience, adaptation and innovative thinking in serving our membership and supporting our partners.

**Michael Hanna, P.Eng, PMP**

President, PMI Manitoba



**PMI MANITOBA IS SHAPING THE  
FUTURE OF OUR COMMUNITY**

## 2021-2022 PMI MANITOBA BOARD OF DIRECTORS



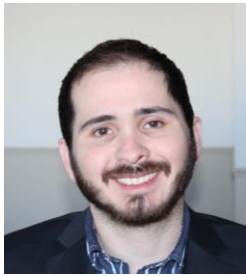
**Michael Hanna, P.Eng, PMP**  
President



**Juan Saldivar, P.Eng, PMP**  
VP Operations



**Debbie Radtke, PMP**  
VP Member Services



**Rafael Vitorelli, PMP**  
Governance



**Peter Owoade, P.Eng, PMP**  
Director, Monthly Programs



**Hanif Young, PMP**  
Information Technology



**Cassio Reis**  
Prof Development



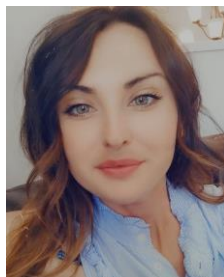
**Natalya Petrekin, PMP**  
Networking Events



**Jonnathan Cruz, PMP**  
Membership



**Emmanuel Oladapo, PMP**  
Director at Large



**Charity LePage, PMP**  
Director, Marketing

## **PURPOSE OF PMI MANITOBA**

As defined in the by-laws for PMI Manitoba the purpose of the PMI Manitoba Chapter – a non-profit, tax-exempt corporation (or equivalent) chartered by PMI, is to advance the practice, science and professionalism of project management in a conscientious and proactive manner. Consistent with the terms of the Charter executed between the Chapter and PMI and these by-laws, the purposes of the Chapter shall include the following:

1. To foster professionalism in the management of projects
2. To contribute to the quality and scope of project management
3. To stimulate the appropriate global application of project management for the benefit of the general public
4. To provide a recognized forum for the free exchange of ideas, applications and solutions to project management issues among its members and others interested and involved in project management
5. To identify and promote the fundamentals of project management and advance the Body of Knowledge for managing projects successfully
6. To collaborate with universities, other educational institutions, and corporate entities to encourage appropriate education and career development at all levels of project management activities.

### **PMI Manitoba Mission:**

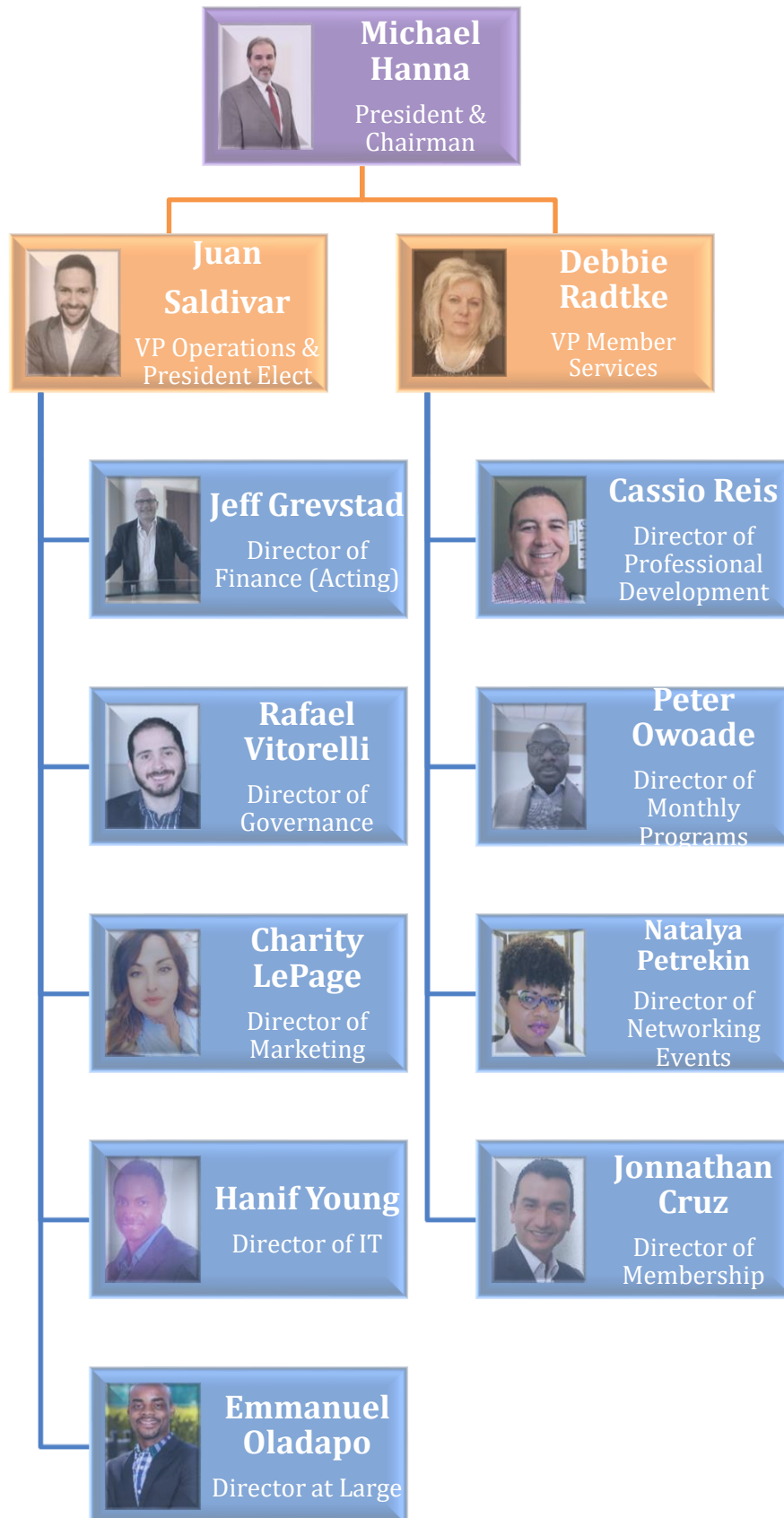
“We are the premier enabler and advocate of project management in Manitoba.”

### **PMI Manitoba Vision:**

“We will broaden the understanding of the value and application of project management by:

- Increasing the awareness of PMI Manitoba;
- Maintaining and evolving quality products and services;
- Building strategic alliances with stakeholders; and,
- Expanding and diversifying our membership, geographic and industry representation...while maintaining a sustainable and fiscally responsible organization.”

# FUNCTIONAL ORGANIZATION CHART



# **OPERATING THE CHAPTER**

## **Member Services**

The work of PMI Manitoba continues to be exciting, engaging and challenging as we focus on member engagement and customer value. We continued to partner with our educational institutions such as the University of Winnipeg. Special thanks to Karen Warkentin for being such a staunch supporter of PMI Manitoba. In one of our joint initiatives, PMI Manitoba provides the U of W students information on the chapter as well as the various kinds of certifications that are available with PMI. PMI Manitoba is always looking for partners within the industry who would like to partner with us to promote project management. If you are interested in partnering with us, please contact me directly.

We began our first mentorship program in 2021 where the number of mentees who signed up for the program exceeded the number of mentors that we had available. The feedback that we have received from the program has been very positive and we plan to continue the program in 2022.

Volunteers continue to be a vital part of our partnership with Manitobans. In several newsletters in 2021, we have been highlighting our volunteers and we hope that you have been able to get to know them better. If you are a volunteer and would like to be included in the newsletter, please contact us.

Members are one of the reasons that we exist as a chapter. We offered a free monthly meeting in November 2021 for all members as we are increasing the value that members receive for their annual fee. We plan to offer more free events for members in 2022, stay tuned to the website for more information. We are continually reviewing and improving our membership benefits. If you have any suggestions for improvement, please let us know.

Providing networking opportunities is one of the key goals of the portfolio and we have a very successful networking event on Nov 25, 2022 with a panel discussion on how to manage your time and priorities better.

Educational opportunities are another key area for the portfolio. We provided Reignite as a virtual conference in Nov 2022 and we have plans for Elevate as a virtual conference on May 4 and 5, 2022 and another Reignite conference on Nov 14 and 15, 2022. We also provided free study groups for PMP and CAPM twice a year.

Thank you for your continued participation and support and we look forward to another successful year for PMI Manitoba.

## **Operations**

The chapter continues to focus on financial sustainability; as well as establishing and maintaining lean and efficient operations.

Financially, as in the prior two years, the chapter finished the 2021 fiscal year in a surplus position largely due to negligible expenditures in venue services for chapter events. The board of directors has allocated a portion of surplus funds to an emergency fund to guarantee the continuation of business operations in the event of an unforeseen event. The board of directors also passed a resolution to allocate a portion of the surplus funds to subsidize chapter events in 2022.

The chapter continues to lay the foundation to support PMI Global's vision of PMI 4.0. The board of directors has introduced a new Director, Strategic Partnerships and Outreach position in alignment with these efforts. In addition, the board of directors will realign the Mission, Vision and Values of the chapter in 2022 to ensure it continues to meet the ever-changing needs of project professionals and changemakers in the future.



The chapter continues to support a virtual meeting environment for member events, board meetings, and conferences. Investments in online meeting technology and tools were made to continue to provide the best experience for members and volunteers. In addition, the chapter developed liability and indemnity provisions to prepare the chapter for a potential future return of in-person events amidst the ongoing pandemic.

Existing sponsors continue to provide strong support to the chapter and its mandate. The chapter enhanced the sponsorship offering by including discounted conference admissions and free job postings for sponsors. The marketing team continues to evolve PMI Manitoba's social media presence to expand the chapter's reach and continue to provide timely information to members and prospects.

The Project of the Year saw another success with two nominations featuring great projects. The winner will be announced in April 2022.

## **Recognition**

Although all our meetings were virtual, we still want to thank Paradigm Consulting Group and Work Place Education Manitoba for offering their Board rooms for PMI Manitoba's board.

# A YEAR IN REVIEW

## Governance

- March 2021: Initiated the Women in Project Management initiative and engaged strategic volunteers and board members.
- March 2021: Selected a new Associate Director volunteer to aid board meetings with detailed note taking.
- April 2021: Onboarded new directors and provided governance and process best practices.
- April 2021: Bylaws changes proposed by the Board of Directors were approved.
- May 2021: Selected Marketing volunteers from the University of Winnipeg to support the PMI MB Marketing strategy.
- June 2021: Updated the Policy Manual to incorporate Policy 20; Capital Management and 21; Director-at-Large appointment.
- September 2021: Project of the Year winners were announced, including Southwest Transitway, Stage 2 and Pembina Highway Underpass Project, and The City of Winnipeg and Dillon Consulting Limited.
- December 2021: Board Meeting continue on an online format throughout the pandemic, and a Covid19 Indemnity form was created for future events.

## Monthly Programs

- January 20, 2021: Chapter Lunch - ***There are no politics in Project Management*** (62 attendees).
- February 02, 2021: Chapter Lunch – ***Dealing with difficult people*** (96 attendees).
- March 2, 2021: Annual General Meeting (108 attendees).
- March 17, 2021 - Chapter Lunch - ***You Can't Lead From Behind – The Untapped Advantage Of The First Team Model*** (74 attendees).
- April 14 2021: Chapter Lunch – ***How to Thrive in the Covid-19 Gig Economy*** (45 attendees).
- May 4, 2021: Chapter Lunch – ***Why Your Project Will Be Late (and What You Can Do About It)*** (51 attendees).
- June 2, 2021: Chapter Lunch – ***The Importance of Managing Big Data*** (54 attendees).
- September 7, 2021: Chapter Lunch – ***Everyone Communicates, Few Connect*** (51 attendees).
- October 5, 2021: Chapter Lunch – ***Agile Strategy - How to enable strategic alignment throughout your entire organization*** (57 attendees).
- November 9, 2021: Chapter Lunch – ***Hack your habits – a practical application of neuroscience to change your life for the better*** (44 attendees).
- December 7, 2021: Chapter Lunch – ***Crafting Strategy for Your Data, - your most powerful, yet underutilized and poorly managed organizational asset*** - (53 attendees).

## Networking

- March 2021 - October 2021 - The effects of the COVID-19 global pandemic restricted us from our usual scheduling of networking events.
- November 25, 2021: Networking Event - First ever, Virtual Panel Discussion - Topic: Multitasking, Managing Competing Commitments. With 27 persons joining the discussion, the event was a success in these unprecedented times.

## Membership

- Increased the number of members from 813 to 987 from January to December 2021. Exceeded the 850 members' target of 2021.
  - Individual members: from 714 to 712
  - Retiree: from 6 to 8
  - Students: from 93 to 267
- Designed content, kicked off, and tracked the Chapter Guest Pass Campaign.
  - 43 Chapter guest pass codes were sent to potential members.

- Designed content, kicked off, and tracked the Auto Renewal Campaign.
  - 492 members activated the Auto-Renewal option (19 more than 2020).
- 6 virtual meeting complimentary codes were sent.
- Launched the “PMI Manitoba Chapter wants to know you better” aiming to increase Chapter awareness and Members recognition.

## **Marketing**

- Maintained a majority of existing Sponsors in 2021, and adjusted 2021 Sponsorship benefits to account for COVID-19 impacts by;
  - Increasing online/social media benefits
  - Providing discounts to the Reignite Conference
  - Better definition between Sponsorship Levels
- Onboarded a new Marketing Volunteer Committee with knowledge transfer and succession planning top of mind
- Developed and implemented a new Social Media strategy with the purpose of driving engagement, increasing membership and awareness of the Chapter

## **Professional Development**

- April 2021: Elevate has been moved to a combined Online event to run with Reignite 2021 due to COVID-19 breakout for the 2nd year consecutive.
- May 2021: PMP/CAPM Online Study Group Session #1 information session and kick-off of the spring season started.
- June 2021: New partnership with PMI Toronto allows us to provide a Live Training format for PMP Boot Camp, CAPM, DSAM, DSSAM.
- July 2021: Launch of the new PMI Manitoba Mentorship Program under Professional Development.
- September 2021: PMP/CAPM Online Study Group Session #2 information session and kick-off of the fall season started.
- November 2021: A successful Reignite 2021 2nd Online Event providing 4 Speakers, 18 Sessions and 6 Keynotes in two day, with an audience of 42 attendees plus 15 PMI MB volunteers.
- December 2021: Started Call for Speakers for Spring 2022 Conference.

# MEMBERSHIP STATISTICS

<b>Membership</b>		Run Date: 16-Jan-2022																											
<b>Membership Count</b>		<b>Retention</b>																											
<table border="1"> <caption>Membership Count Data</caption> <thead> <tr> <th>Date</th> <th>Count</th> </tr> </thead> <tbody> <tr> <td>01/01/2020</td> <td>900</td> </tr> <tr> <td>01/01/2021</td> <td>800</td> </tr> <tr> <td>01/01/2022</td> <td>950</td> </tr> <tr> <td>15/01/2022</td> <td>980</td> </tr> </tbody> </table>		Date	Count	01/01/2020	900	01/01/2021	800	01/01/2022	950	15/01/2022	980	<table border="1"> <caption>Retention Data</caption> <thead> <tr> <th>Date</th> <th>Retention %</th> </tr> </thead> <tbody> <tr> <td>01/01/2020</td> <td>75%</td> </tr> <tr> <td>01/01/2021</td> <td>68%</td> </tr> <tr> <td>01/01/2022</td> <td>75%</td> </tr> <tr> <td>15/01/2022</td> <td>75%</td> </tr> </tbody> </table>		Date	Retention %	01/01/2020	75%	01/01/2021	68%	01/01/2022	75%	15/01/2022	75%						
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# **APPENDICES**

## **Appendix A**

PMI Manitoba audited 2021 financial statement as provided by Lazer Grant