



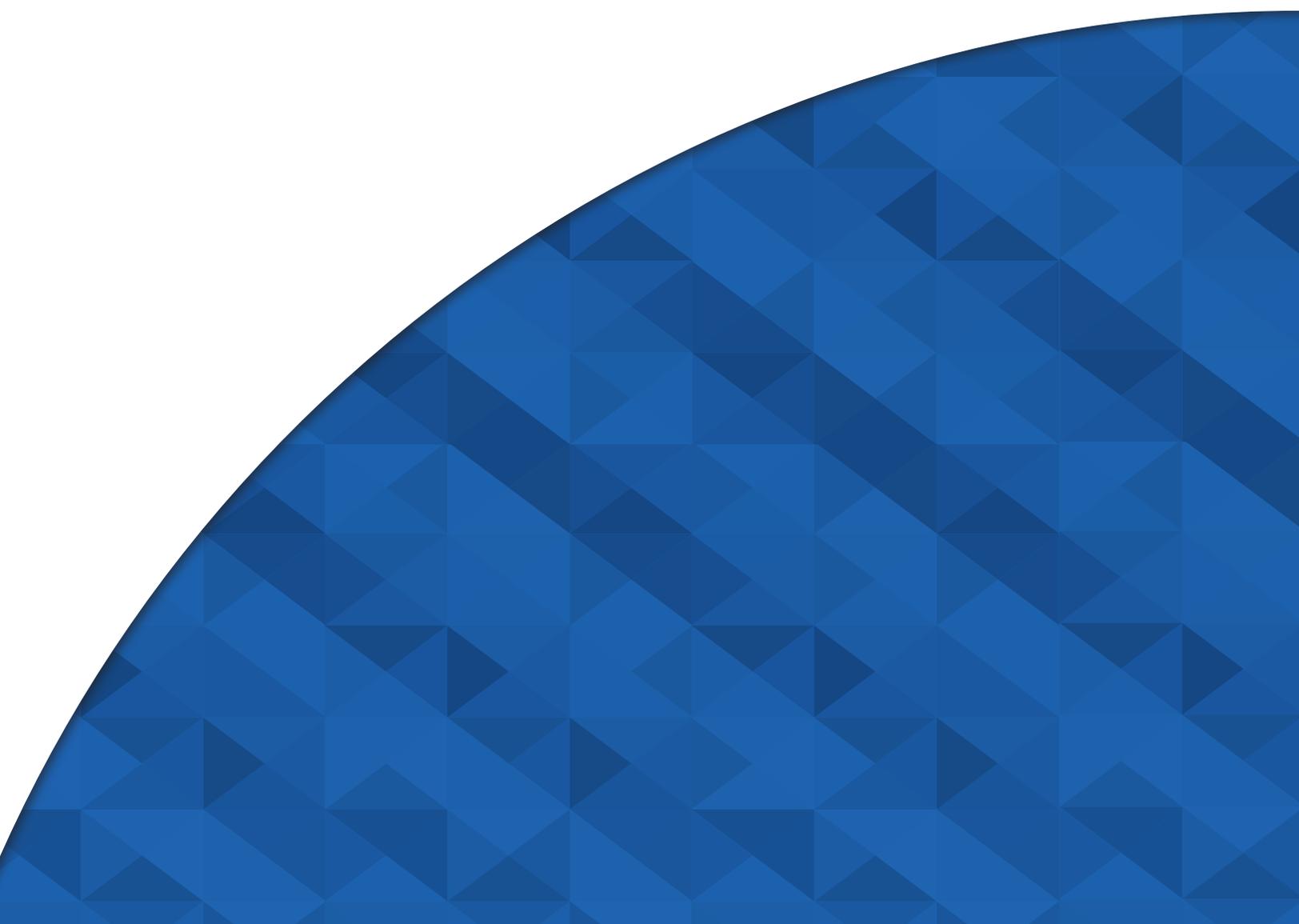
**PMA**®

CANADIAN WEST COAST CHAPTER

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# 2017 Annual Report

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# Section 1 – Executive Summary

The Canada West Coast Chapter (CWCC) went from success to success in 2017. We put on a well-attended conference, increased membership for the second year in a row, and added a YouTube channel to our marketing tools, to name just three.

Our second annual two-day conference, held in downtown Vancouver, attracted nearly 300 attendees from 180 different companies. The conference showcased the project management profession to the Lower Mainland, and attracted many new members to the chapter.

Thanks to the success of the conference and the many efforts of the membership team, our chapter has grown by approximately 22% over the last two years. This is unparalleled growth for a large chapter. With more than 2500 members, we are now one of the largest chapters in Canada.

PM-Volunteers (PMV) continued to thrive with a record high 26 nonprofit projects and 4 workshops during 2017. Over 3000 volunteer PM and PMV team member hours were delivered. PMV is now registered under the new BC Societies Act, and was able to forge new connections with PMI Vancouver Island, Project Managers Without Borders and MaRS Discovery District that promise to bring new opportunities for project managers in the months and years ahead.

The chapter is in healthy financial condition and continues to provide value consistent with our constitution.

We focused on attracting and engaging students and new graduates in 2017. Our Project Management Apprenticeship Program (PMAP) continued to flourish this year, with over a dozen students learning from mentors and giving back to the chapter as volunteers.

I am proud of all the chapter has accomplished in 2017. Our success comes from our members and from the dedication and persistence of everyone who volunteers as part of our board, on a portfolio team, on a project team, or at an event. We thank you for your continued support and look forward to another successful year in 2018.

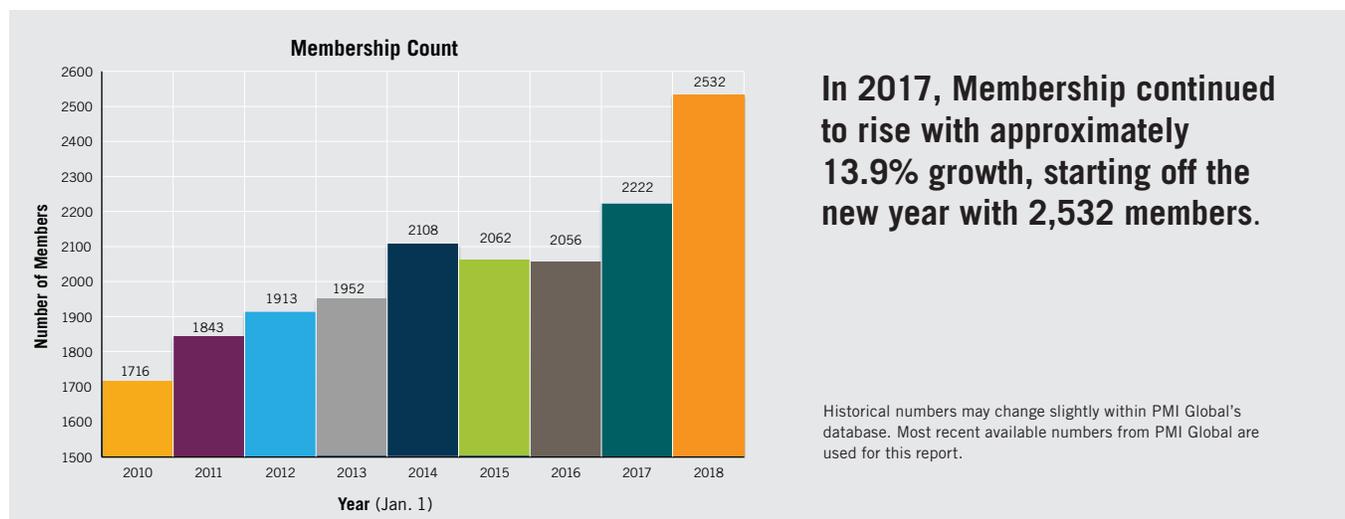


– Qudsia Ahmed, President

# Section 2 – Membership

## 2017 Accomplishments

- Membership and retention
  - Membership rose by 13.9% in 2017, after a 8.07% increase in 2016. PMI CWCC finished 2017 with 2,532 members: the highest in chapter history.
  - Retention rates rose by approximately 1%; 69.65% of members renewed their membership in 2017.
- Continuous improvement of programming
  - New member orientations every two months, improved slide deck and presenters.
  - Quarterly meetups continued to attract 50-90 attendees per event.
  - Thanks to our partnership model with other project management Meetup groups, the membership portfolio hosted or supported more than 24 events in BC last year.
    - ◆ Partnered with the Project and Product Managers Meetup in Kelowna to deliver PDU and non-PDU events in the Okanagan region.
- ◆ Partnered with the Digital Project Managers Meetup to reach a group of over 1000 Digital Project Managers, resulting in monthly events.
- Job Seekers program is adding popular panels and panelists to its programming (e.g., “Contracting in Project Management”, featuring a small business lawyer, an IT/contracting accountant, and recruitment agency CEO, hosted by a senior IT consultant, which sold out.)
- Improved on-campus engagement
  - Held the first new members’ orientation on campus.
  - VP, Membership gave more than 10 on-campus presentations about PMI CWCC and project management as a career.



# Membership Continued

## 2018 Plans

In 2018, Membership will focus on improving data collection and analysis and pursuing new partnership opportunities. Having better information will help us provide quality services for our growing membership. Improved and new partnerships will provide more venues for the project management community to collaborate and connect.

- Continue current offerings, with a more formalized method of learning and improving
  - Create standardized surveys for all membership events, including partner events
  - Hold post-event reviews with the VP and the event management team
  - VP of membership will continue to give ~10 on-campus talks per year
- Continue to support groups in the PM community to grow our impact in the project community
  - Student associations at university events
  - Digital Project Managers meetup
  - Okanagan Project & Product Managers Meetup
  - Approach new groups (such as the various Agile groups) to encourage new connections.

– Qaid Jivan, VP, Membership

# Section 3 – Programs

## 2017 Accomplishments

The chapter hosted ten dinner events in 2017. Our top five highlights:

- **January 18:** Journey Toward Project Excellence: Successful Strategies and Lessons for Building an Engaged and Talented Workforce, with NASA's Ed Hoffman.
- **April 19:** BC Hydro PMI 2016 PMO of the Year: Achieving Award Winning Results – The not-so secret ingredients to our success! with Ken McKenzie and Neil Kelly.
- **May 24:** The Project Management Game: EA Sports Vancouver with Natalie Altshuler. A presentation at the Electronic Arts facility in Burnaby.
- **July 20:** It's More than Just a Lane – The Art of Managing Transportation Projects in the City, with Ron Lee. This event was held on the rooftop of 754 Thurlow, and Ron Lee presented about the Sea-to-Sky Highway project that was part of the city's 2010 Olympics infrastructure upgrades.
- **November 23 and 24:** Evan Zelikovitz, the Corporate and Government Relations Manager for PMI in Canada, spoke about agility in managing our projects at our last dinner event of the year, and then hosted our first Executive Council Meeting with PMO leaders. Evan plans to return in 2018 and every year.

## 2018 Plans

- **Jan 17, 2018:** Transforming Your Life, Work and Service through Servant Leadership with Kevin D. Monroe.
- **February 21, 2018:** Project Managers as “Soft Skill Stewards”: A Foundation for Enhancing Workplace Culture with Dr. Rob Hershorn.
- **April 9, 2018:** Mark Langley, CEO PMI – first visit to Vancouver during TED Talk – CWCC PMI Reception.

– *Rosmary Conte, VP, Programs*

# Section 4 – Education

## 2017 Achievements

The Education portfolio delivers key exam preparation courses for the project management community within the Lower Mainland. We aim to train successful PMPs who are equipped to practice project management in a variety of industries. Our instructors are project management professionals within the community who create a collaborative environment within each course.

Some of the Education portfolio's achievements for 2017 include:

- Offered 4 successful PMP prep courses
- Trained 93 PMP Candidates
- Made over \$80,000 for the chapter
- Started creating new PMP prep course material by hiring a consultant for PMBOK Version 6

## 2018 Plans

Certification Courses:

We are planning to offer the following courses in 2018:

- 4 PMP/CAPM Preparation Courses
- 1 PMI-ACP Preparation Courses in Partnership with other REPs
- 1 PMI-PgMP Preparation Courses in Partnership with other REPs

Performance Appraisal:

- Creating a Performance Appraisal/ Pulse Check system to evaluate volunteer sponsors
- Improving Instructors' Evaluation System

Wider Access

Providing free workshops to the communities which are under covered. Other areas in the Mainland including Kelowna, Kamloops and Squamish/ Whistler are the main targets.

– *Mehran Jamshidi, VP, Education*

# Section 5 – Marketing

## 2017 Accomplishments

The marketing team added a director of communications, Giada Bruschini, to manage communications between the marketing groups and other portfolios. The team also welcomed several new volunteers, who are learning our marketing tools, including Joomla and GoAnimate.

- The social media group added a YouTube channel this year. The first video on the channel explains what PMI CWCC is and what we do. Developing the concept, storyboard, audio recordings, and graphics took about four months. The team used tools such as GoAnimate and GoToMeeting to make collaboration easier and improve communication. Nico Primak worked on the graphical animations and Graham Laschuk provided the voiceover. The video was released to the public at Electronic Arts during a special industry event in May 2017.
- The website team, led by Cindy Laschuk, had objectives for this year to identify areas that needed UI/UX improvements, give the homepage a dynamic look and feel by changing static content, logical menu link placements, and highlighting of chapter events, introduce automated process flow to reduce redundancy and errors. Graphic templates are saved in a template folder on Google drive for designers to work on new graphics that require design work, such as sponsor logos and slides for the slideshow.

- The eBlast team, led by Cherishma Sadasivuni, continued using the email platform MailChimp for marketing emails. Volunteers have been trained on the new tools and templates, and the eBlast template has been standardized. Using MailChimp has reduced the number of emails with huge attachments sent between the various portfolios. The team is more efficient and can handle special requests faster.

## 2018 Plans

The marketing team will continue to improve the website and social media platforms, and support internal marketing to the other portfolios.

- The social media team will upload and manage content bi-weekly. New videos will be uploaded to the chapter's YouTube channel.
- The eBlast team will continue to streamline the process for content update requests and address formatting issues with Joomla.
- Our new website graphic designer will work with the eBlast and Social Media teams to deliver any special graphics so they are consistent across all channels.
- The website team will develop a new contemporary layout design that will be responsive on all browsers, tablets, and mobile devices. They are looking at ways to automate the volunteer team pages so that the information between operations and the volunteer manager is consistent with data on the website team pages.

I sincerely thank the marketing team for all their hard work in the past year. This great and growing team is looking forward to another fantastic year.

— Nalini Vadivelan, VP, Marketing

### Connect With Us



# Section 6 – Outreach

The Outreach portfolio builds partnerships with sponsors and advertisers, other not-for-profit professional associations, and industries interested in project, program, or portfolio management.

We work closely with sponsors to advocate for and promote their efforts to mature the profession of project management within their organizations. We also help improve their organizational success through PMI recognized standards.

We rely on our sponsors and partners to support the Chapter’s mission and local project management community in any way they can, including with funding.

## 2017 Accomplishments

- Generated over \$20,000 in revenue from Outreach and Conference sponsors.
- Generated \$10,000 in trade-offs through strategic partnerships and direct advertisements.
- Established new sponsorship or partnership agreements with City of Vancouver, Yorkville University, Capillary Consulting and Procom, and renewed partnerships with Diversified Communications, The Art Of, Inexertus, Infomine, L4L, and TMP Consulting Engineers.
- Contacted new potential sponsors: Advent Group, Brain Sensei, Bosa Construction, Concert Properties, Hays, Polygon Homes, QuadReal, and Bentall Kennedy, and continued to build relationship with IT/IQ, Corporate Oasis, and Cocentric Solutions.
- Conducted market research for potential sponsors in the finance industry and applied for sponsorship from HSBC Canada, Vancity and BlueShore Financial.
- Completed a direct-mail campaign to Sun Life, Aplin, Tekara, AMBiT Consulting, InterVISTAS, GNA Consulting and HollisWealth.
- Helped bring sponsors to the PMI CWCC annual conference, and participated in events including City of Vancouver driven program “Evolve”, Yorkville University MBA curriculum, ProjectWorld, and BC Hydro PM events.
- Added a new revenue-generated product to our partnership agreement with Workopolis Job Board.
- Recruited five volunteers to the portfolio and reshuffled some roles to best employ our doubled complement of 10 volunteers.

## 2018 Plans

- Collaborate with Marketing to generate awareness in the marketplace using marketing collateral materials, ads, periodicals, and social media channels, including a concise brochure for the sponsorship package.
- Secure new opportunities for eBlast advertisements and 2018 conference.
- Pursue new partnerships with organizations and companies with Affinity programs or packages that benefit our members and volunteers.
- Continue to build key strategic relationships with for-profit, non-profit, and not-for-profit professional associations and organizations.

– Fadi Attal, VP, Outreach

# Section 7 – 2018 AGM Agenda

**Date:** Wednesday, February 21, 2018

**Chair:** Qudsia Ahmed

**Minute Taker:** Jasmine Maini

**Location:** Four Seasons Hotel Vancouver  
791 West Georgia Street,  
Vancouver, B.C.

**Meeting:** Called to order at XX:XX PM

1. Confirmation of Quorum & Acceptance of Agenda for 2017 AGM
  - a. CWCC PMI members present at time of Call to Order = XX total attendance
  - b. Quorum

Motion: the membership approves the Agenda for tonight's AGM.

Move: [Name]  
Second: [Name]  
Resolution:

2. Acceptance of the 2016 AGM Minutes

Motion: the membership approves the minutes of the 2016 Annual General Meeting

Move: [Name]  
Second: [Name]  
Resolution:

3. Highlights from the 2017 Annual Report were presented.
4. The 2017 Actuals and 2018 Budget were presented.
5. Nomination and Election of Chapter Officers for 2018.

Motion: the membership approves the following candidates for the Board of Directors:

|  |                                     |  |  |
|--|-------------------------------------|--|--|
|  | <b>President</b>                    |  |  |
|  | <b>VP, Education</b>                |  |  |
|  | <b>VP, Professional Development</b> |  |  |
|  | <b>VP, Programs</b>                 |  |  |
|  | <b>VP, Membership</b>               |  |  |

Move: [Name]  
Second: [Name]  
Resolution:

6. Recognition of retiring office-holders (Qudsia Ahmed, Qaid Jivan, Mark Freeman, Peggy Ah Yong)
7. Other business
8. Motion to adjourn meeting

Move: [Name]  
Second: [Name]  
Resolution:

Meeting adjourned at X:XX p.m.

# Section 8 – 2017 AGM Minutes

**Date:** February 22, 2017

**Location:** Fairmont Hotel Vancouver  
(15<sup>th</sup> Floor) – 900 W Georgia  
Street, Vancouver BC

**Chairperson:** Qudsia Ahmed, President

**Minute Taker:** Jasmine Maini, Program Portfolio

**Meeting:** CALLED TO ORDER at 7:42 pm

1. Confirmation of Quorum & Acceptance of Agenda for 2017 AGM:
  - a. CWCC PMI members present at time of Call to Order = 65 total attendance
  - b. Quorum Confirmed

**Agenda** (*only members in good standing may vote*):

- Confirmation of Quorum & Acceptance of Agenda
- Acceptance of the 2016 AGM Minutes
- Presentation of 2016 Annual Report
- Presentation of the 2017 Budget
- Nomination and election of Chapter officers for 2017-2018
- Adjourn AGM

Motion: the membership approves the Agenda for tonight's AGM.

Move: Peggy Ah Yong  
Second: Nico Primak  
Resolution: Motion Carried

Motion: the membership requests clarification and addition of items to the Agenda for tonight's AGM.

Move: Walter Wawruck  
Second: Eamonn O'Laocha  
Resolution: Motion Carried

2. Acceptance of the minutes of the 2016 AGM.

Motion: the membership approves the minutes of the 2016 Annual General Meeting

Move: Kris McCleary  
Second: Ian Palmer  
Resolution: Motion Carried

3. Highlights from the 2016 Annual Report including Budget Performance were presented.
4. The Budget for 2017 was presented.

Motion: the membership challenges the 2017 Budget and requests clarification

Move: Walter Wawruck  
Second: Sherry Lipp  
Resolution: Motion Carried

Other challengers to the Budget:

Eamonn O'Laocha  
Mohamed Ezz Ghanem

Motion: the membership accepts 2017 Budget

Move: Rosemary Conte  
Second: Mehran Jamshidi  
Resolution: Motion Carried

# 2017 AGM Minutes Continued

## 5. Nomination and Election of Chapter Officers for 2017.

Nominees were presented and identified themselves. There is only one new addition to the board for the VP Operations role.

Motion: the membership approves the nominated candidate for the Board of Directors:

|                         |  |
|-------------------------|--|
| <b>VP Operations</b>    | Elect <b>John Rauser</b><br>until Feb 2019         |
| <b>VP Outreach</b>      | Re-elect <b>Fadi Attal</b><br>until Feb 2019       |
| <b>VP Membership</b>    | Re-elect <b>Qaid Jivan</b><br>until Feb 2019       |
| <b>VP Marketing</b>     | Re-elect <b>Nalini Vadivelan</b><br>until Feb 2019 |
| <b>VP PM-Volunteers</b> | Re-elect <b>Shawn Hawkins</b><br>until Feb 2019    |

Move: Nico Primak  
Second: Cindy Laschuk  
Resolution: Motion Carried

## 6. Recognition of retiring Board Members

- Ram Kodali VP, Operations

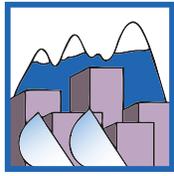
## 7. Motion to ADJOURN Meeting

Move: John Gravel  
Second: Fred Haiderzada  
Resolution: Motion Carried

Meeting: ADJOURNED at 8:43pm

## Additional Notes:

1. Membership requested to provide a more in depth understanding of the budget for 2018 AGM and to display the current and the past year budgets in parallel for their better understanding of the Chapter's growth
2. Membership requested a soft copy of the AGM's discussion items including the budget, agenda, etc. prior to the AGM so that they may familiarize themselves and come prepared with their questions and comments



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