

Annual Report 2021

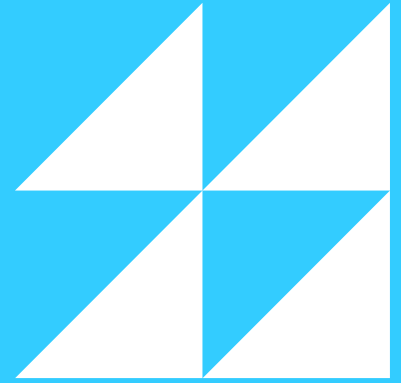




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President Message

President Message

Dear PMI CWCC members,

We are celebrating the end of another exceptional year of service to our community and are looking forward to more success in the years to come.

Yes, it wasn't easy to keep everyone motivated and yet deliver quality services throughout the pandemic. However, as a result of our commitment to "providing project management education, mentoring, networking, knowledge, and support to practitioners and organizations" and maintaining the promise of being the go-to source for the project management community in Mainland BC, we were unavoidably compelled to go above and beyond in order to achieve our chapter's invaluable vision and mission.

We entered 2021 having adopted the new ways of living and working imposed by the global pandemic. Most of our services, meetings, workshops, training sessions, mentoring sessions, the annual conference, were planned and delivered virtually to comply with the provincial and federal guidelines. This was to keep you safe and healthy.

The tenacity, resilience, and innovation of our volunteers and board members deserve reflection once again, and I sincerely feel proud to have led such an active group of professionals. I commend the volunteers at PMI CWCC for their tireless efforts, dedication, time, talent, and energy in providing professional practices as well as creative solutions to offer services to our valued members.

It is with deep regret that I must inform you that this will be my last day at the PMI CWCC as the President and a Board member. Being part of the PMI family and serving on the PMI CWCC Board has been both an enlightening and rewarding experience for me. It's now time to give others a chance to continue and bring new ideas to the table. Being part of the PMI family and serving on the PMI Board has been both an enlightening and rewarding experience for me. It's now time to give others a chance to continue and bring new ideas to the table.

The Annual General Meeting (AGM) has always been a moment of rebirth and a meaningful stop for identifying novel ideas, welcoming newly elected board members, saying goodbye to departing members of the board, and embracing upcoming challenges.

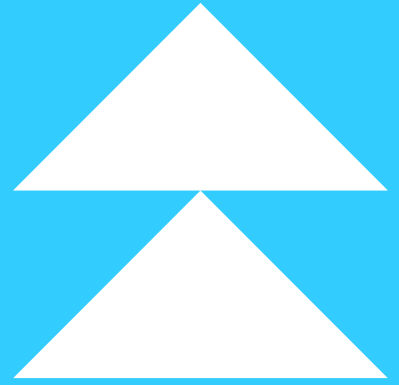
The following report provides a glimpse into what our chapter volunteers have accomplished over the last three years. We are hopeful for a better future and plan accordingly to make 2022 even more successful for you and PMI CWCC.

Thank you,



Mehran Jamshidi
President





Chapter leadership



Vision:

To be the go-to source for project management community in the Mainland BC.



Determination:

We showed perseverance in accomplishing goals many of which had changed due to the pandemic.



Collaboration:

Increased collaboration with partners, sponsors and educational institutions.



Innovation:

We always challenge the status quo and embrace, and implement new ideas.



Change:

We changed the way we used to do our business.



Outcomes:

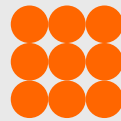
We are making an impact on our community.



Teamwork:

Projects are delivered by people, but winning projects are delivered by the team.

We are a proud Team 😊



Community:

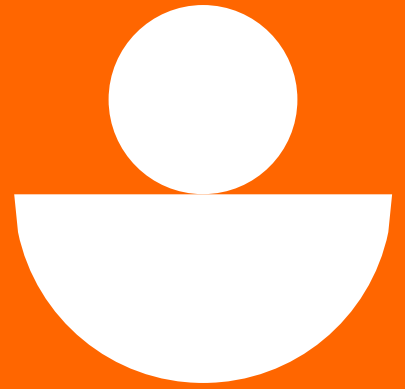
The people that are part of our world make it what it is today. Our community is one of our most valuable assets.



Growth:

It's not all about the numbers. We have transformed to contribute to the greater good.





2021 Board



Mehran Jamshidi



Afroza Lucky



Andrzej Nawrocki



Bhavik Patel



Edward Hung



Gina YJ Lee



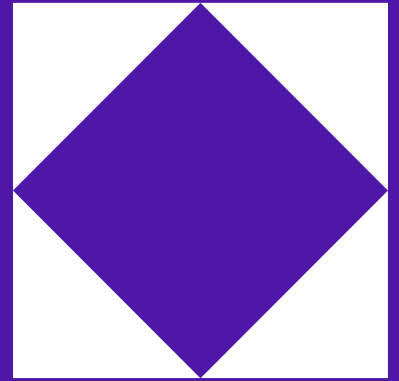
Neil Kelly



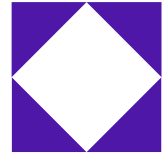
Peyman Abedi-Rad



Rosmary Conte



Education Portfolio



Achievements:

PMI CWCC Education completed its first successful year of ATP (authorized training provider) partnership with PMI Montreal in 2021 - and offered 3x different types of virtual (synchronous) certification courses to our local BC project management community members:

1. PMP online courses (offered 6x times)
2. DA online courses (offered 2x times)
3. Risk Management online course (offered 1x time)

Our goal for this fiscal year was to offer Project Management Professional (PMI-PMP) *online* courses 6 times – (which is 2-3x times the # of courses that PMI CWCC used to conduct *in person* (pre-covid) on average, each year) – and the team achieved this goal. We understood that as circumstances remained tough with the pandemic, and many allocated majority of their stay at home, this was our small yet consistent and sincere effort to support our community with options that would continue to propel their career advancements.

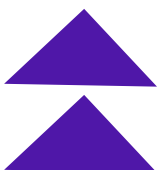
2021 was also PMI's first year introducing Disciplined Agile educational training – and PMI CWCC was excited to offer 2x DA (disciplined agile) online courses to our community via partnership with (ATP) PMI Montreal.

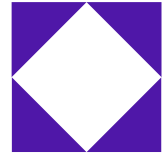
Risk Management was not a part of our original plan but instead a pleasant add-on service that we brought to fruition via our close working relationship w/ our ATP. We offered 1x online Risk Management course in 2021.

As for PMI-ACP (Agile Certified Practitioner) - we welcomed, onboarded, and trained a new instructor at PMI this year. We completed 1x course in 2021 Mar – and have 1x more on track for 2022 Jan/Feb, before the fiscal year closes out.

Through close teamwork with our internal Membership Portfolio at PMI CWCC, both the Membership and Education Portfolios were able to initiate Study Groups in 2021. We together coordinated:

- 1x for PMP in Sep
- 1x for PgMP (Program Management Professional) in Oct





The Education Team also maintained another year of healthy partnership with Knowledge Adapters and continued to provide an online subscription-based virtual (asynchronous) PMI Professional in Business Analysis (PMI-PBA) Boot Camp course.

-In 2021 we saw a 60% improvement in total enrollment headcount (ie. 8 registrants this year) compared to the year before.

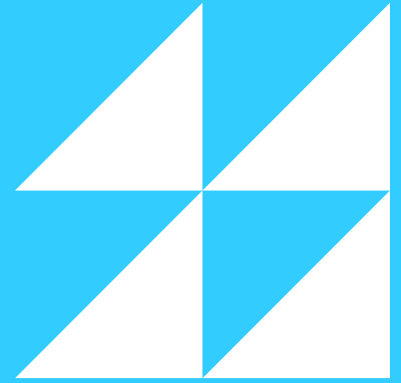
Plans:

In 2022, we plan to remain purposeful, positive, and passionate about the explored range and options of educational services that we get to provide to our professionals in the Canadian West Coast project management community.

The above lines of services are a mix of legacy and novelty, and through ongoing feedback sessions and cross-functional collaborations - we would like to resume providing the blend of offers we have identified.

Thanks to our core group of 6x volunteers on our Education Portfolio Team (who have dedicated themselves to our chapter for 1 to nearly 10 years) – we are confident that we will continue to pave our own initiatives while remaining stable with the relationships we have established with our partners.

To and from our Education Team - many thanks for all the commendable milestones yet again in 2021, and many thanks in advance for our 2022 that is to unfold.



Finance



2021 Finance Accomplishments

The Finance Portfolio is responsible for the overall financial management of the chapter. Finance's primary function is internal, as such, Finance supports the financial and strategic decisions of our CWCC PMI portfolios.

Operational improvements were the focus in recent years. As significant operational improvements have been made, the focus for 2021 was organizational improvements.

Finance expanded their team by adding a Manager of Finance. The finance team is now composed of the Treasurer, Financial Analyst, Manager of Finance, external bookkeeper, and external auditor.

Several policies were created to formalize Finance practices, such as, credit card policy, expense reimbursement policy, and reserves policy.

Business continuity documents have been prepared to ensure finance procedures are well documented to allow for smoother transitions for new Boards.

2022 Finance Plans

There are always opportunities for improvement for any operations and we expect that the new team in 2022 will tackle some of these opportunities. The focus in 2022 will be to provide the chapter and its volunteers with exceptional support so that we can continue to have a healthy reserve relative to benchmarks.

2022 CWCC PMI Budget Plan

The financial highlights are in the following pages of this annual report.





2021 Financial Highlights

	2021 Actuals	2021 Budget	Surplus (Deficit)
Portfolio Income	137,629	202,875	(65,246)
Portfolio Expense	101,149	205,310	104,161
Surplus (Deficiency) of Income over Expenses	36,480	(2,435)	38,915

	Actual	Budget	Surplus (Deficit)
	December Ended	December Ended	
Portfolio Income	A	B	C=A-B
Education	1,414	33,750	(32,336)
Finance	516	2,200	(1,684)
Membership	100,734	115,000	(14,266)
Mentorship	30	-	30
Outreach	10,379	10,300	79
Professional Development	23,856	33,625	(9,769)
Programs	700	8,000	(7,300)
Region1	-	-	-
Total Revenue	137,629	202,875	(65,246)

	Actual	Budget	Surplus (Deficit)
	December Ended	December Ended	
Portfolio Expense	A	B	C=A-B
Board	4,237	23,590	19,353
Branches	-	1,000	1,000
Education	3,771	12,626	8,855
Finance	18,472	19,796	1,324
Marketing	3,008	12,350	9,342
Membership	12,378	33,800	21,422
Mentorship	6	-	(6)
Operations	16,578	17,450	872
Outreach	1,301	1,600	299
PM Volunteers	10,000	10,000	-
Professional Development	20,237	35,148	14,911
Programs	1,520	28,100	26,580
Region1	-	-	-
Chapter Volunteers	9,641	9,850	209
Total Expenses	101,149	205,310	104,161



2022 Budget Highlights

	2021 Actuals	2022 Budget	Surplus (Deficit)
Portfolio Income	137,629	147,048	9,419
Portfolio Expense	101,149	153,194	(52,045)
Surplus (Deficiency) of Income over Expenses	36,480	(6,146)	(42,626)

	Actual December Ended	Budget December Ended	Surplus (Deficit)
Portfolio Income	A	B	C=A-B
Education	1,414	4,145	2,731
Finance	516	1,360	844
Membership	100,734	106,608	5,874
Mentorship	30	-	(30)
Outreach	10,379	10,379	-
Professional Development	23,856	23,856	-
Programs	700	700	-
Region1	-	-	-
Total Revenue	137,629	147,048	9,419

	Actual December Ended	Budget December Ended	Surplus (Deficit)
Portfolio Income	A	B	C=A-B
Board	4,237	34,750	30,513
Education	3,771	4,433	662
Finance	18,472	19,576	1,104
Marketing	3,008	16,260	13,252
Membership	12,378	17,818	5,440
Mentorship	6	-	(6)
Operations	16,578	17,000	422
Outreach	1,301	1,600	299
PM Volunteers	10,000	10,000	-
Professional Development	20,237	20,237	-
Programs	1,520	1,520	-
Chapter Volunteers	9,641	10,000	359
Total Expenses	101,149	153,194	(52,045)



2021 BALANCE SHEET

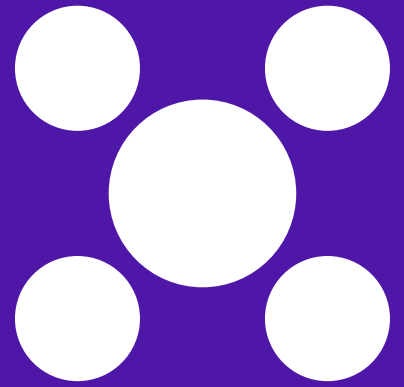
Assets	Balance at December 31, 2021
Current Assets	
Total Chequing/Savings	291,781
Total Accounts Receivable	6,329
Total Current Assets	298,110
Total Fixed Assets	0
Total Assets	298,110



2021 BALANCE SHEET

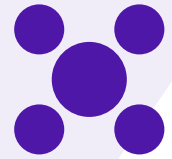
Liabilities & Equity	Balance at December 31, 2021
Current Liabilities	
Total Accounts Payable	4,025
Total Credit Cards	5,048
Total Other Current Liabilities	11,743
Total Liabilities	20,816
Total Equity	277,294
Total Liabilities & Equity	298,110

Key Takeaway: Our Reserve is a healthy equivalent of 83.19 months of operation assuming a \$40,000 annual deficit



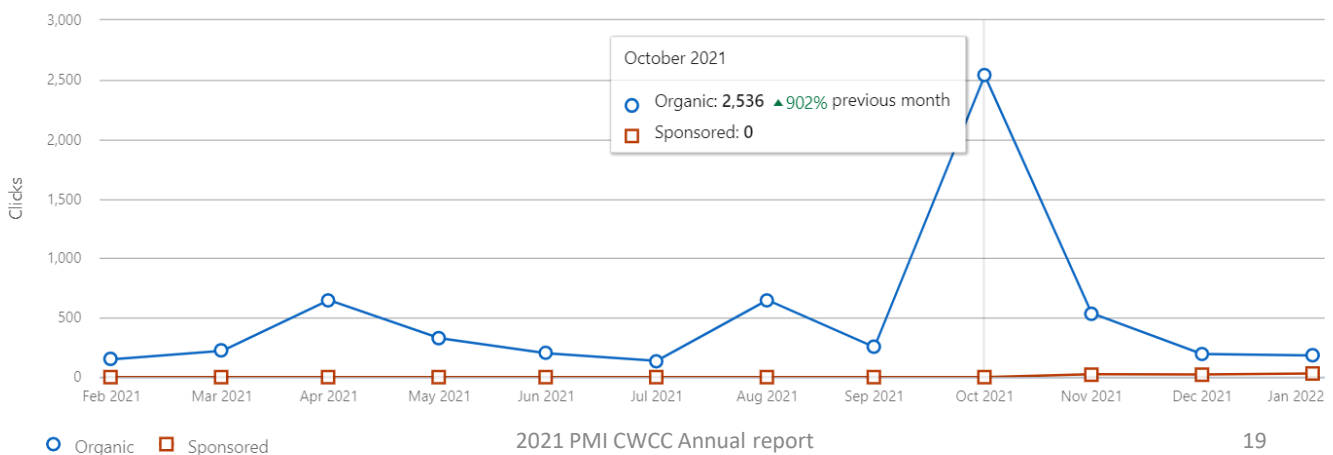
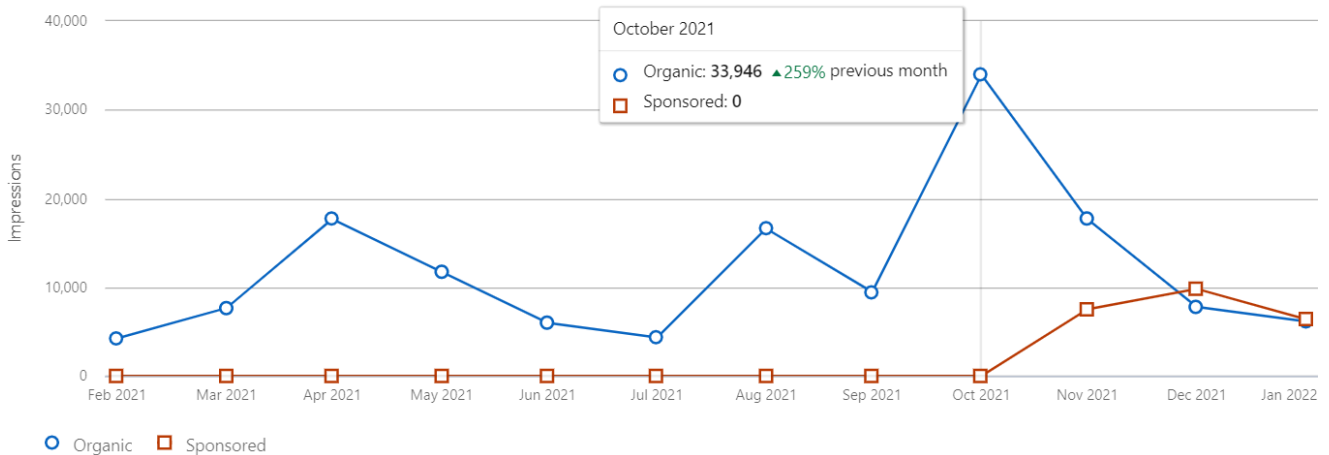
Marketing Portfolio

Social Media

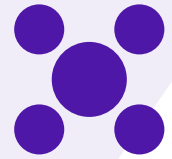


2021 Accomplishments

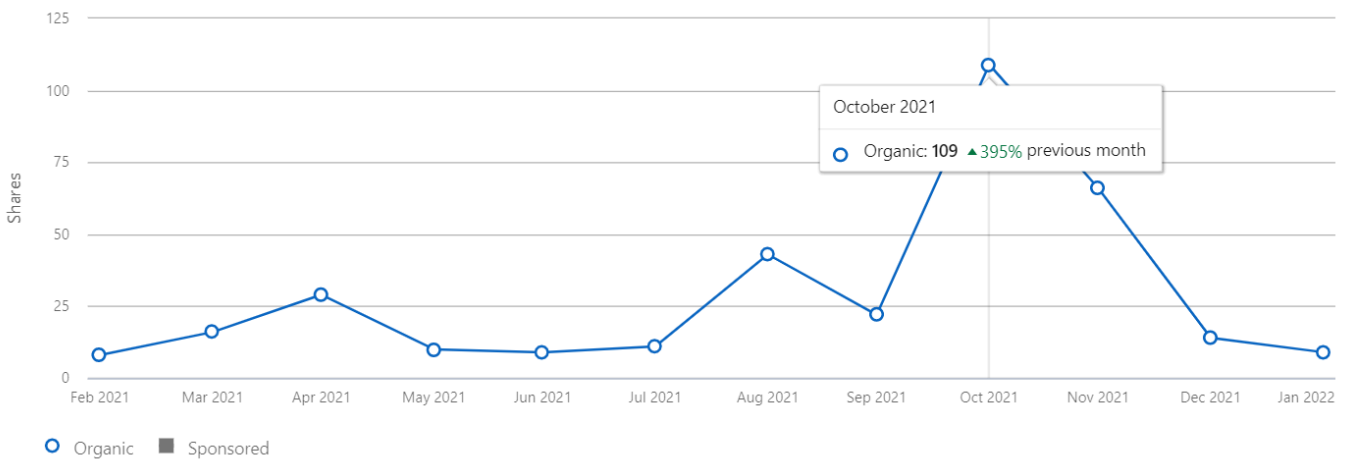
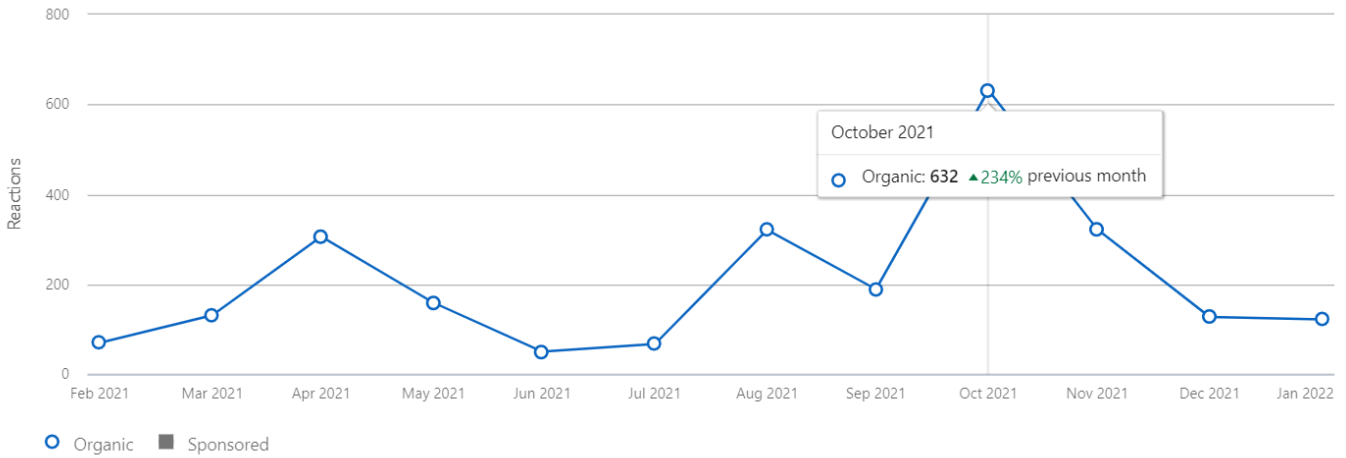
- 2021 had been the most engaging year in terms of the audience engagement because of the PMWEST2021 Annual Conference. For the first time in PMI CWCC history, the chapter decided to host a virtual conference to follow the provincial regulations because of COVID. This led an increased pressure on Social media front to reach far and wide audience in short amount of time.
- Bhavik Patel being the Director of Social media and also Marketing lead for the conference, spear-headed the marketing campaign using strategic planning and execution. He not only supported the chapter for all graphic design needs but also made the first ever PMWEST logo! Apart from that, the campaign was promoted on multiple social media platforms and received a whooping audience response.
- Over 2021, the chapter followers on LinkedIn reached an all time high of 9700+ members. In Oct 2021 (the month before the conference) the organic visitor reached a record high of 700+ page views, 34000+ impressions and 2500+ click rates. The below graph shows the success of marketing campaigns.



Social Media



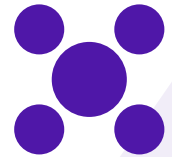
2021 Accomplishments (continued)



Plans for 2022

- Addition of new Social media Manager, Saboor Meherzad
- Plan to increase the team to 4 people
- Reach audience in different social media platforms such as Instagram

E-Blast

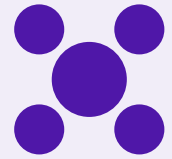


2021 Accomplishments

- For the most part of 2021, the eBlast team as led by Demerson Neves and 3 members (Alex Costa, Chad Jorgensen, and Leah) continued with publication of the weekly newsletter. Our team kept communications open through e-mail.
- Last August, Demerson handed off the eBlast Director role to Leah. Demerson took time off from volunteering as he pursues work related certifications and development.
- Leah transitioned smoothly into the new role with the help and support of Bhavik, Alex and Chad.
 - Even with the small team, we managed to work around our schedule and the challenges with the platform when we experienced issue with images not downloading and delays in delivery of our newsletter.
 - Leah was able to connect to the team in Dark Rhino to resolve issues with the platform.
- In August, we posted open positions for eBlast Content Managers.
 - Beginning of November, we onboarded Asal Abdolahi to the team and then towards the end of October, we added Monique Francois and Saratu Jimoh (Ola).
- Supported the virtual conference
- The eBlast Content Editing process was documented and distributed to the team.
- Leah provided hands-on training to Asal and in December Asal helped to train Monique and Saratu. Asal successfully completed her first publication in November and December.

Plans for 2022

- Delegate roster preparation to either Chad or Alex.
- Team to work with Dark Rhino to clean up and improve newsletter template and remove old campaigns.
- Work with Marketing Team and our team to explore creative ways to make our newsletter better.



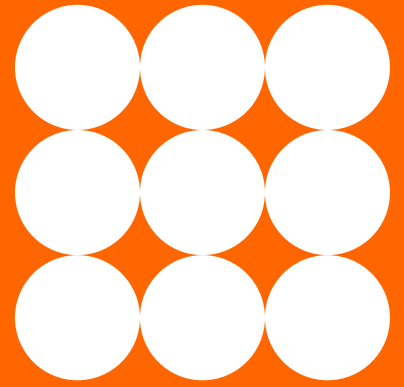
Website

2021 Accomplishments

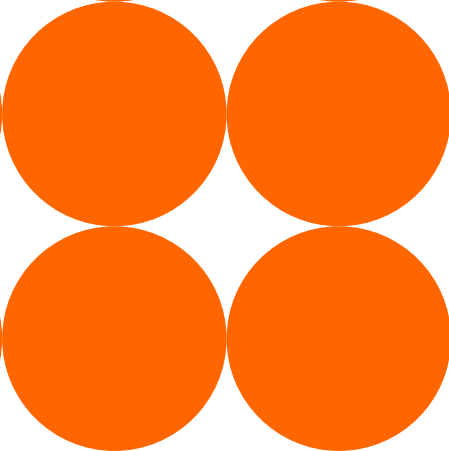
- After Dark Rhino acquired Mg2 Media Company in year July, 2020 and up to Jan, 2021 the team members to interact were same and later months there were new team members for us to interact for issues through trouble tickets and resolutions. However, support from Kevin Casey, President getting involved along with his top Management were cooperative and helpful in the transition and resolving our issues in a timely manner.
- Due to pandemic and its continuity of impact there were not many external activities and with all virtual events our team has been very receptive to any issues, updates and addressing them in a timely manner. Conference related issues were raised by issue tickets much early of the conference date, were made resolved in a timely manner and we Website team were well prepared for the event.
- Our team was supportive and fulfilled activities of Mentorship Program, Volunteer of The Month, Project Management Apprenticeship Program (PMAP), Scholarship opportunity, new volunteer profile & PM News updates along with several other ad hoc requests.
- Chapter Board announced of Conducting Annual Conference Virtually in May, 2021 was very helpful and want to thank the team in coming up with preparation of our website requirements for the big event. We had many conversations with Bhavik, team, Board and Dark Rhino Executive to fulfill requirements of our website to host this great event. Additionally, two volunteers were selected to support the event which was great help. With Raj overseeing and management reporting, Oma taking the lead, Kathleen, Saad as supporting volunteers, Debora, and Viplov as back up and helping us as needed, Bhavik's strong support and as the conduit with Board we provided a timely support to Conference Chair, Committee and Board of Directors for the success of Conference and meeting the target of 200 plus attendees.
- Website team is proud of Omatseyin Akporiaye and Kathleen Morrison to accomplish PMP® Certifications after joining as Volunteer with our Chapter and being mentored & motivated with our environment.

Plans for 2022

- Continue working with Dark Rhino and the BoD's to improve Content Management System (CMS) and add any new functionalities for the benefit of internal processes, for members plus the visitors of our website.
- Continue improve the content and accuracy of information on the website.



Professional Development



PMI WEST

Virtual Conference

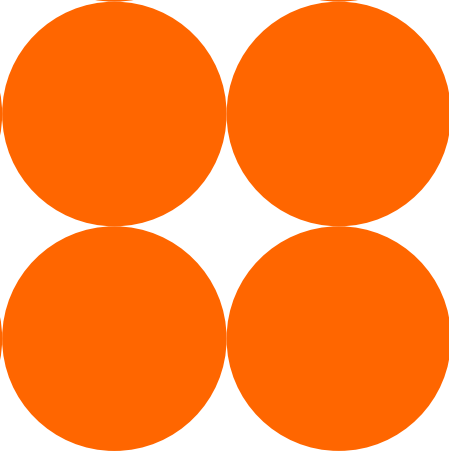
This portfolio is mainly responsible for the following initiatives:

A) PMI CWCC's Annual Conference (PMWest):

We successfully planned and delivered our first virtual conference, PMWest 2021, on November 6, 2021. This was our first conference since 2019 and attracted over 250 registrants that included students, members and non-members from all over the world. The conference had over 30 speakers, which included 3 facilitated panel discussions. The event was a great event and a financial success due to the efforts of the entire volunteer committee and tireless work of the Conference Chair, Nalini Vadivelan.

Two of our current Board members, Neil Kelly and Rosmary Conte, were the Conference Support Committee Chairs. In addition, another Board member, Bhavik Patel, joined as the Marketing Lead for our campaign to channel multiple marketing streams to promote the conference.

We selected a previous PMI CWCC Board Member, Nalini Vadivelan, to join the team as the PMWest 2021 Conference Chair. Nalini did an extraordinary job bringing together, technology, marketing, outreach professional development and finance. The planning took 6 months of continued hard work from our committee members, with initial weekly meetings increasing in frequency closer to the conference date.



The keynote speaker for PMWest 2021 was Kay Frances who delivered an interesting and entertaining session entitled 'The Funny Thing about Stress'. The conference theme was Rethink, Revive and Renew.

1. Rethink - Strategy & Business, Thought leadership

The time-tested golden approaches may not work as the challenges we now face are different than in the past. Our approaches to work, study, organization, business and society may need some Rethinking as we enter into this new normal.

2. Revive - Management Techniques, Action leadership

With great challenges, comes both great responsibility and opportunity. Our economy and institutions should Revive to see these new possibilities. There is no discipline better placed to drive these changes than Project Management As project leaders and managers we play an important role in this process.

3. Renew - Community Building, Social leadership

There is no greater depth and breadth of expertise to manage paradigm shifts and transformations to bring new values, than the human centric leadership does. We can Renew our commitment to each other, society and build back a better thriving inclusive and sustainable economy being a mindful project leader.

Our future PMWest2022 plans include a return to in-person conference and career fair.





B) Outreach

Despite pandemic challenges in 2021, the PMI CWCC Outreach was actively collaborating with corporations, educational institutions, professional organizations, and other community organizations to promote and raise awareness of the project management profession and the PMI CWCC chapter. The Outreach team was responsible for the PMWest 2021 conference sponsorship and support.

UBC Sauder School of Business – Continuing Studies was our Gold Sponsor and BC Hydro and Douglas College were our Bronze sponsors for the event.

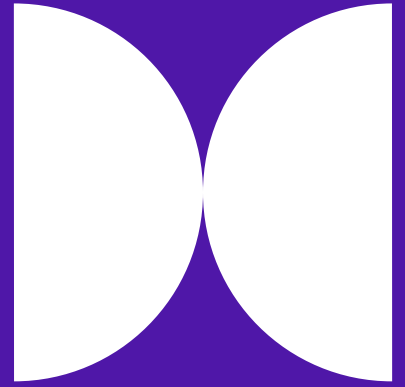
We added two new team members and a promotion for Damoon Shirazi, Director of Outreach. For more information, contact, outreach@pmi.bc.ca.

- Damoon Shirazi, Director of Outreach
- Mohammad Darabi; Manager, Community and Corporate Outreach
- Vishal Kumar; Manager, Educational and Professional Outreach

C) Mentorship Program:

This program provides objective- and milestone-based coaching intending to maximize the results of Protégé efforts. Our Mentors are well-established professionals with years of experience in their fields, particularly project management.

In 2021's PMI CWCC Mentorship program, there were some new Mentors, Protégés returning as Mentors and of course some seasoned Mentors. They ranged in industries such as IT Coaching, Software Development, Manufacturing, Mining, and the Food sector. And from the unique mix of potential Protégés, there were some pivoting from Finance in the Hospitality industry to ERP applications, others in Fabrication, Food, and Civil Construction industries. All aspiring to be more confident in applying project management principles. Due to the current state of the World, we didn't see as many numbers as we have in our 'in-person' times. We had 19 Mentors and Protégés in 2021. To learn more, email Nigel Apomah, at mentorship@pmi.bc.ca.



Membership & Programs

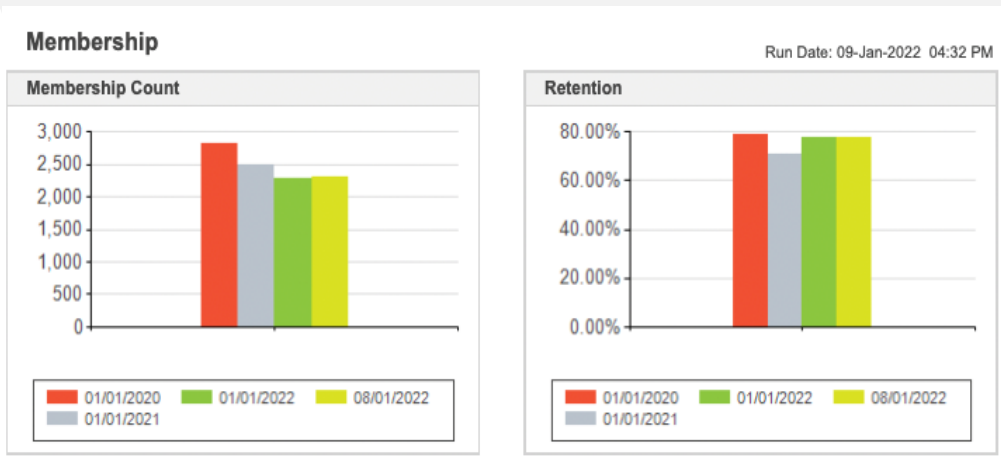
2021 Accomplishments

The Membership Services and Programs Portfolio's mandate is to create transformative experiences for our member base by delivering a diverse set of events including career-oriented sessions, online webinars, workshops, professional development opportunities, and finally ensuring we are building a connected community of Project Management Professionals. In 2021, we welcomed over 600 guests while delivering over 20 in person and virtual live events including:

- Motivating Dinner Speakers
- Active Networking and Social Opportunities
- Engaging Discipline Agile Workshops
- Inspiring Job Seeker Webinars
- Warm & Welcoming New Member Orientations
- Educational Lunch Hour PDU Sessions

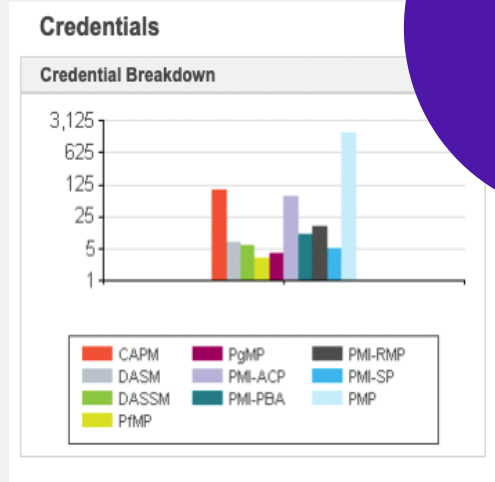
Membership & Retention

- PMI CWCC Memberships decreased from 2021 with membership at 2,500 to 2,300 in 2022 resulting in an 8% decline.
- Membership retention rates also decrease from 78.72% to 77.94% resulting in a 0.78% decline.



Membership Credentials (Jan 9, 2022)

- The Chapter's membership credentials consist mostly of PMP, CAPM and PMI-ACP certifications. There is growing interest with PMI's new certifications, Disciplined Agile Scrum Master (DASM) and Disciplined Agile Senior Scrum Master (DASSM).



New Members Orientations

- Upgraded and improved presentation slides by including high level PMI CWCC and PMI Global data analytics to present emerging trends, patterns, and relationships
- Delivered 4 successful new member orientations via live virtual webinars.

Academic Partners

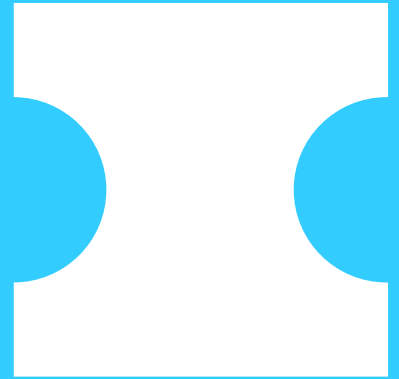
- Increased new member orientations at local educational institutes including UBC Sauder School of Business, SFU Continuing Studies, Capilano University, Langara College, and Douglas College.
- Membership Financial Assistance Scholarship
- In partnership with UBC Sauder School of Business, Continuous Business Studies, CWCC provided several financial assistance scholarships to chapter members in the Project Management and Certificates program.

2022 Plans

- The Programs and Membership Services portfolios will continue to advocate for individual membership needs by providing more opportunities to connect with project managers with a specific focus for career growth, job seekers, industry specialist, networking, and educational development.
- Our Team will stabilize the membership and retention levels.
- Our Team will continue to engage with our academic partners with on-campus speaker events and increase outreach virtual live Project Managers meetups, webinars, and financial assistant scholarship opportunities for members.

Our Team will be sponsoring a research project with Douglas College Applied Research and Education: Project Management Applied Research.

- Our Team will continue to be the Disciplined Agile Chapter Champions by creating awareness and providing the latest updates about PMI's Disciplined Agile Journey.



Operations

Operations

The mandate of the operations portfolio at the Canadian West Coast Chapter (CWCC) is to provide tools and resources to all other portfolios in the chapters, which further allows the portfolios to fulfill their goals and serve the chapter's members. The operations portfolio also collaborates with other portfolios in the chapter to implement cross functional initiatives.

In 2021, the CWCC operations portfolio played a key role in supporting the chapter in many ways. First, the operations portfolio supported the chapter in hosting its first ever virtual conference. Second, the operation portfolio continued to provide training and support for the chapter's online events. Third, the operations portfolio continued to support the education portfolio in delivering our online course offerings. The operations portfolio also supported various collaboration tools used by our volunteers.

2021 Accomplishments



Virtual Events

- Supported the chapter in hosting its first ever online conference, PM West 2021
- Provide support and training to various portfolios and speakers
- Worked closely with portfolios to ensure the success of our virtual event experience



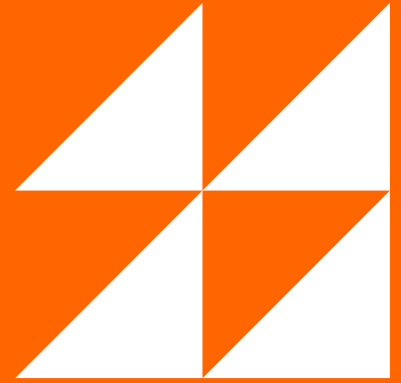
Virtual Training

- Provided training and support to portfolios, speakers and instructors
- Worked closely with portfolios to the success of our virtual class experience



Collaborative Tools

- Additional digital services and tools for our volunteer team
- Additional access controls around security and availability of CWCC information



Nominations Committee

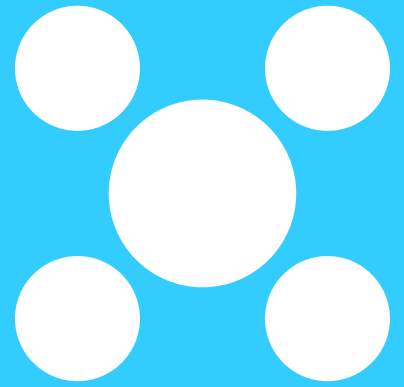


At the end of 2021, PMI CWCC opened up 4x positions for the Board Team of 2022 – and the Nominations Committee devised a rigorous and fair plan for recruitment. Thank you once again, sincerely, to all those who showed interest and applied! Over the course of approximately 3.5x months we:

- Advertised postings
- Reviewed 20x application
- Conducted interviews with selected (12x) applicants
- Created a shortlist
- Pulled together an online Meet the Candidates Night (for our members in good-standing to greet our shortlisted candidates)
- Fulfilled the election at our virtual AGM (Annual General Meeting) to warmly welcome the new Board of Directors to the team

The Nominations Committee recognized the importance of retaining high-calibre talents that would provide quality service to our community – and we were excited to meet outstanding applicants this year. In addition to overall leadership capability and fit – the Nominations Committee sought for those who balanced exemplary and reasonable altruism that reflected in their passion to give back to our diverse and growing project management society. And per usual, through stable guidance and training provided to our newly onboarded directors – (courtesy of both our tenured and existing board leaders) – we are proud and humbled to announce that we have built another strong Board Team to direct the next fulfilling step for PMI CWCC's bright venture





Volunteer Portfolio

PMAP

PMAP program was resumed in 2021 and due to COVID-19 situation sessions were conducted virtually. This year we have 7 mentees and all of them successfully completed and currently preparing for CAPM exam.

VOLUNTEER APPRECIATION

This year our volunteers remain enthusiastic and committed despite the extended challenging time, we have recognized and thanked our volunteers for their years of service to the CWCC community by inviting them in dinner event.

DISCLAIMER

The event shown in the following slides were all organized as per the provincial and federal COVID-19 related guidelines on the day of event. In case of any questions, please contact the chapter at <https://pmi.bc.ca/contact?contact>

GLIMPSES OF 2021



2021 Board gathering

2021 PICTURES (Continued)



2021 Board gathering



Board members during Nov-2021 Programs dinner event

2021 PICTURES (Continued)



PMWEST2021 Conference team during Nov-2021 Programs dinner event

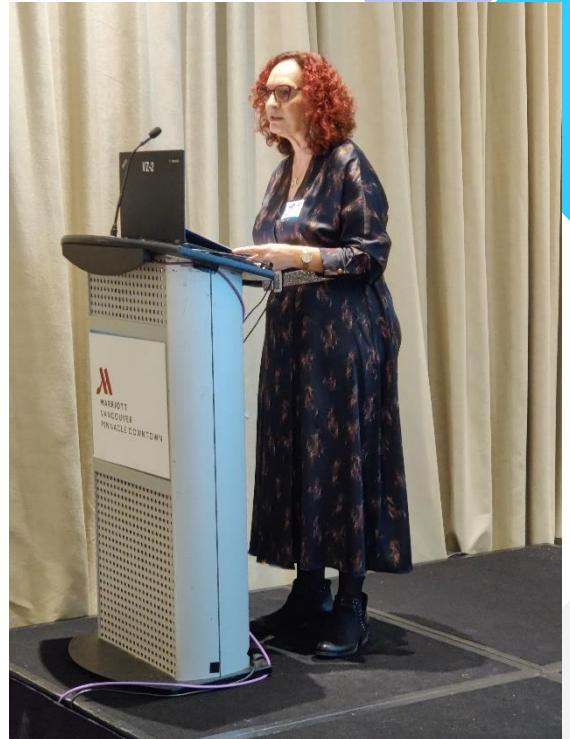


PMI CWCC Volunteers during Nov-2021 Programs dinner event

2021 PICTURES (Continued)



PMI CWCC president, Mehran Jamshidi addressing the audience



Rosmary Conte, Addressing the audience



Audience during the Nov-2021 Programs dinner event

2021 PICTURES (Continued)



Marketing team Dec-2021 get-together



Marketing team Sep-2021 get-together

2021 PICTURES (Continued)

PMAP 2021 pictures

