



A Case Study for Change: Membership Growth & Retention at PMI Metrolina

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October 08, 2015

Agenda

- Background
- New & Expanded Programs
- Administration & Marketing
- Current State
- Looking Forward

Background

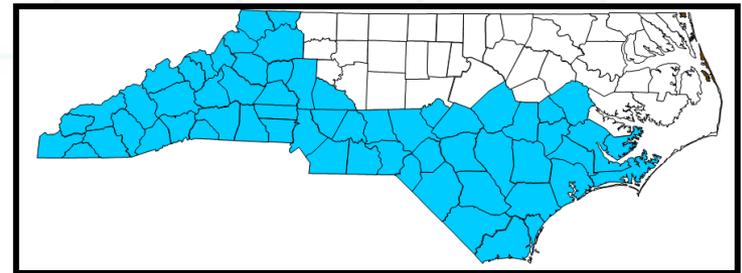
Historical Information

- In late 2009, the chapter lost over \$40,000 at a single event. Combined with other fiscal and leadership challenges, the year end bank account balance dropped below \$15,000.
- Membership declined slowly for the next 3 years.
- By June 2012, chapter membership had dropped to 1481 members with an average engagement level between 4 and 5%.
- As a part of the 2012 Strategic Planning meeting, the BOD set a goal to increase member and prospect engagement for the following year. By engaging our existing members, we felt that we would be more likely to gain and retain new members.

Background

Chapter Footprint

- The term Metrolina is a regional reference for the area immediately surrounding Charlotte.
- Despite this moniker, the chapter footprint covers the entire border with both South Carolina and Tennessee as well as the northwest corner of North Carolina – 59 of North Carolina's 100 counties.



Background

2013 Regional LIM

- Conversation took place regarding engagement levels at the different types of chapters (metropolitan vs. geographically diverse) within the region.
- Expectations and consensus from the group was that 20% engagement from metropolitan chapters and 10% from geographically diverse chapters should be the goal.

New & Expanded Programs

Pilot Satellite Meetings

- While our chapter had always considered itself to be a Charlotte based chapter, our footprint crossed the state.
- The BOD agreed to a pilot program to host a few satellite meetings in areas immediately outside of Charlotte.
- The target areas were suburban areas with larger concentrations of chapter members as well as prospective members.

New & Expanded Programs

Initial Expectations

- The groups were expected to comply with the following conditions:
 - Average attendance should be between 5 and 10% of the members and prospects in that area.
 - The group would complete one community service project per year.
 - Leadership for each meeting site would be from the area.
 - The group should plan to be self sustaining with one year.

New & Expanded Programs

Member Response

- The response was excellent.
- Some of the initial meetings had attendance exceeding 25% of members in the area.
- Volunteers stepped forward to lead the meetings going forward.
- Members have went of their way to contact the BOD with comments including requests to expand the program into their community.

New & Expanded Programs

Pilot Expansion

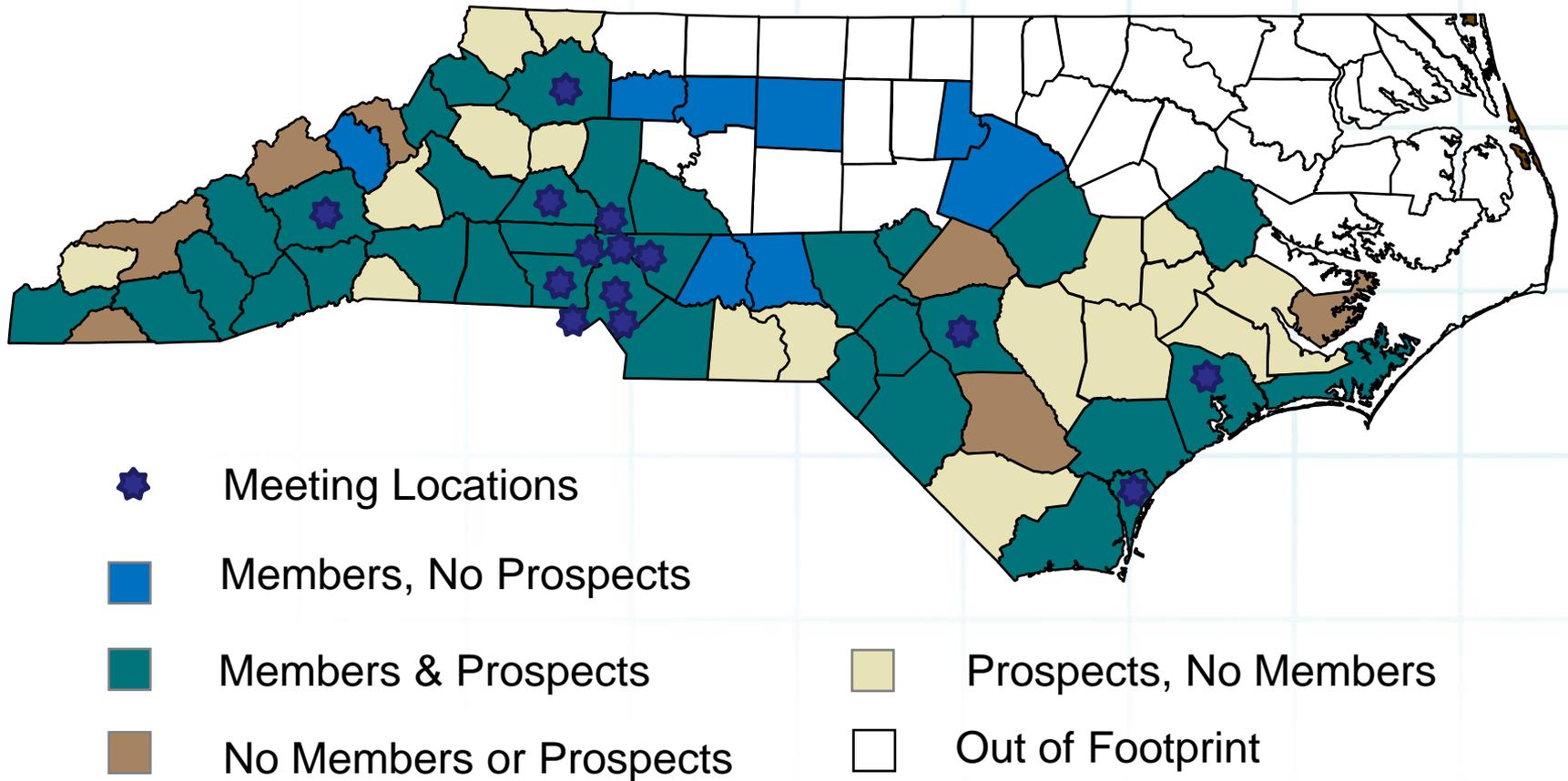
- With the initial success of the metro area satellite meetings, there was some discussion about expansion of the pilot.
- A group in Asheville had been meeting several years prior but had suspended meetings due to lack of interest, support and organization.
- A few new PMI members had contacted PMI about starting a chapter in the Asheville area.
- This was the first area selected for a pilot outside of Charlotte. The first meeting had 10 members present.

New & Expanded Programs

Expansion of the Program

- Every few months, there were additional meetings planned in other areas.
- Some metro areas were split while others were eliminated.
- The areas outside of the Charlotte metro area were also a focus for growth as well as engaging our existing members living in those communities.
- We looked at larger suburban areas with concentrations of chapter members as well as prospective members.

New & Expanded Programs Geography & Population



New & Expanded Programs

Member Engagement Activities

- Skill Fest
 - Increase from an annual event to three times per year
- Half Day Saturday PDU Events
 - Free quarterly events with breakfast
- Speaker Development Program
 - Coaching & speaking opportunities
- Communities of Practice Areas
 - Portfolio Management & Agile

Administration & Marketing Board of Directors Structure

- The BOD needed to better handle transition and maintain continuity each year to better focus on longer term goals.
- The BOD was restructured from 6 one year terms to 7 staggered two year terms. Our Past President also serves on the BOD as a non-voting member.
- Our membership approved this change in the spring on 2014 and the new structure transition began with the next election in the summer of 2014.
- In addition, the BOD would need to adjust the number of chairs three fold to support the expansion of the satellite program across our footprint.

Administration & Marketing Name Changes

- During the 2014 NA LIM, several members of our BOD encountered interesting feedback about the program.
 - Most of the discussion centered around the word satellite. It was clear in our discussions that satellite had very different connotations within PMI.
 - Discussion also included the term “Chapter with Branches” but this also did not reflect how we operated.
 - The Washington DC chapter has a similar program which uses the term “Community” Meetings.
- The BOD agreed to adopt this term going forward and re-branded many aspects of our chapter communications to embrace the communities within our footprint.

Administration & Marketing Related Changes

- Monday PDU e-mails
 - Weekly emails with PDU opportunities for the week
- Partnership with Universities & Colleges
 - Co-host events
- Barter System
 - Exchange sponsorship for venue space, speaker engagements and in kind donations

Current State

- The chapter now hosts 13 community meetings as well as our traditional chapter meeting in Charlotte.
- From the low point in mid-2012 to the end of June 2015 (about 3 years), our membership has increased by 30.9% to 1909 members.
- Our local prospective member list has doubled.
- Engagement has increased to 13.8% over the same period.

Looking Forward

- Professional Development
 - Virtual Exam prep and RMP, ACP, PgMP exam preparation
- Marketing
 - Marketing in non-traditional areas
 - Partnership & Joint Meetings with other professional groups
- Community Service
 - Engagement from each community
 - Partnership with PMIEF, JA and other Non-Profits
- Membership
 - Utilizing the Chapter Guest Pass program to expand the non-metro areas

Contact Information

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