



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

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# Agenda

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

# Background

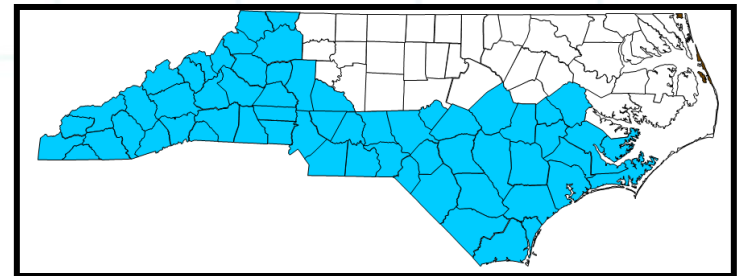
## Historical Information

- 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

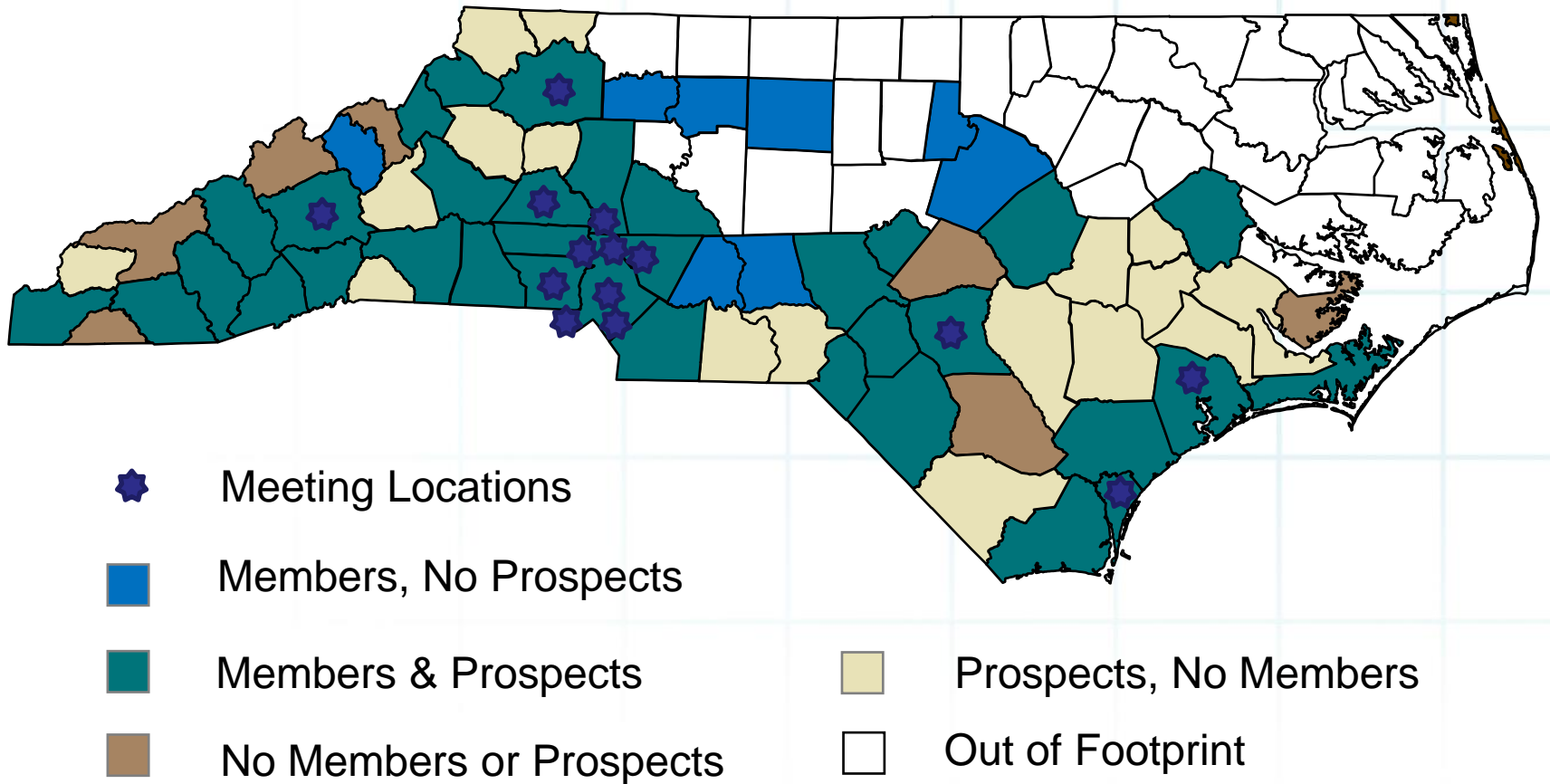
- With the initial success of the metro area satellite meetings, there was some discussion about expansion of the pilot.
- A group in Asheville had been meeting several years prior but had suspended meetings due to lack of interest, support and organization.
- A few new PMI members had contacted PMI 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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