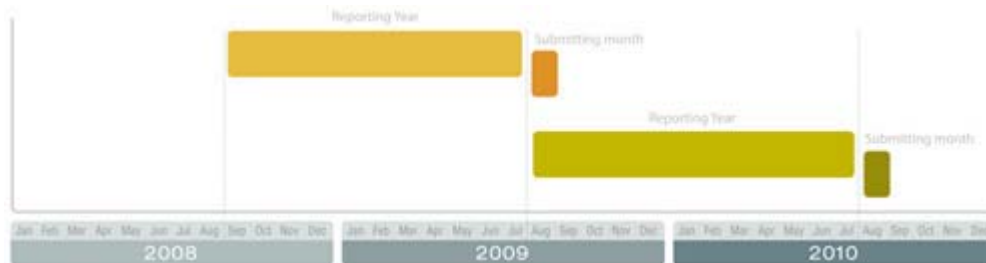


Strategic Alignment Planning and Reporting (SAPR)

Frequently Asked Questions

1. **Who has to report?** All chapters are responsible for reporting.
2. **What are we reporting?** Community Leaders will choose who will be designated as the individual responsible for reporting. The reporting tool is the [Strategic Alignment Scorecard \(SAS\)](#). In a chapter the individual responsible for completing the SAS will be reporting how the chapter performed against the targets that are set in the SAS. If the community is providing extended services they should also be reported in the SAS as well. The data reported in the SAS will reflect the immediate 12 months prior to reporting (this does not have to be a calendar year).
3. **How are we going to report?** The reporting process for 2009 will be through the current SAS spreadsheet. The SAS will be sent to each chapter president on 15 December 2008. Return completed form to SAPReporting@pmi.org.
4. **When do we have to report?** The first SAS from all chapters is to be submitted during 2009. The date on which the chapter sends the report to PMI is decided by the chapter. The date that is chosen in 2009 will be the annual date for the chapter unless otherwise noted. If choosing a different date for subsequent years, the chapter leader must send an email with the annual date to SAPReporting@pmi.org.



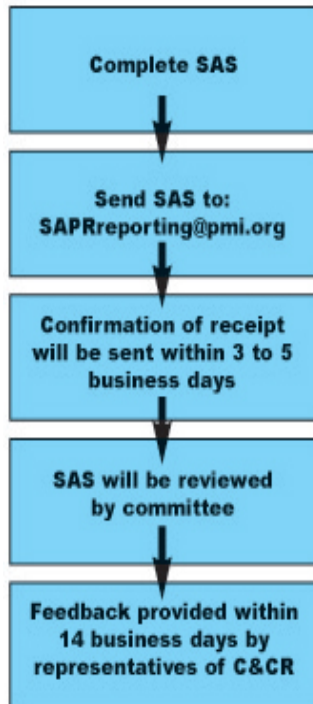
[Click to enlarge image](#)

5. **Who approved the templates being used to report?** The SAS was approved and developed by representatives from the Component and Community Relations Department, the volunteer community and governance and executive administration (liaison to PMI Board).
6. **What will be done with the information collected?** The information collected will be used to identify where gaps exist, share knowledge, and to apply resources to assisting chapters in filling those gaps. It will also be used as a tool to provide statistics that will support the need for chapters in mentoring and collaboration among leaders.
7. **Will there be any feedback provided?** If so to whom? Yes, there will be feedback provided by representatives of the Component and Community Relations Department. The feedback may be simply congratulations on a job

well done; it may be a list of resources available to assist in the gaps identified. Feedback may also include collaboration efforts, mentoring requests etc...

Component mentors will be sent copies of the scorecard and feedback to build regional initiatives create agendas, address trends and the needs for service delivery as well as encourage collaboration within the region.

8. **Who will be reviewing the scorecards?** The SAS will be reviewed by a skilled volunteer committee appointed by PMI. The committee will consist of volunteers from each region.
9. **How will PMI verify reported metrics?** Using a statistically relevant random sampling, PMI will audit chapters and request evidence to support the metrics reported. This may include business plans, newsletters, links, and annual reports.
10. **What is the process for reporting?** The process for reporting is



11. **Are there any tools/templates or examples to assist communities with reporting?** There are presentations posted on the Component Leadership website regarding the SAS and reporting such as
 - a. Strategic alignment scorecard examples
 - b. Catalog of Core and Extended Services
 - c. Strategic Alignment Planning and Reporting process presentations from Leadership Institute Meetings
 - d. Multi-Year Business Plan

Lexicon of terms associated with the SAPR process

1. SAS – Strategic Alignment Scorecard – tool used for alignment to PMI’s strategic goals. Also used as reporting tool.
2. Catalog – Catalog of Core and Extended Services
3. PMF – Performance Management Framework now known as the Catalog of Core and Extended Services
4. BP – Business Plan
5. MYBP – Multi-Year Business Plan template
6. SAPR – Strategic Alignment Planning and Reporting
7. GOC- Global Operations Center
8. C&CR – Component and Community Relations Department
9. Toolkit – Component Services toolkit located on the Component leadership Website <http://componentleadership.pmi.bluestep.net>
10. BSC – Balanced Scorecard (As related to PMI’s Strategic Plan)
 - o Balanced Scorecard Strategy Map – PMI’s visual to translate PMI’s strategic plan into action
 - o PMI’s Value Proposition – To be the *eminent influence* for the advancement and success of project management in all markets throughout the world. PMI should be the #1 identified resource for all knowledge, programs, products & services relate to project management. (3-5 Years – Time horizon for achievement).
 - o PMI’s Envisioned Goal - *Worldwide organizations will embrace, value, and utilize project management and attribute their success to it.* (10-30 years – Time horizon for achievement).

The reporting of the metrics outlined in the Catalog of Core and Extended Services is separate from charter Renewal. The community is still responsible for completing the charter renewal process the same as in previous years. If you have any questions regarding charter renewal please contact Anne Jenemann at anne.jenemann@pmi.org.