It’s Time for Change-Makers

**PMI® Leadership Institute Meeting 2017 — North America**

26-28 October 2017 | Chicago, Illinois, USA

Agenda current as of 6 October 2017

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<th>Daily Agendas (click on link)</th>
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**Full PMI® Global Conference Agenda**

### Wednesday, 25 October 2017

<table>
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<th>Time</th>
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<tr>
<td>7:30 am – 8:00 am</td>
<td>Coffee Service</td>
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**Regional Chapter Leader Meetings**

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<tr>
<td>8:00 am – 12:00 pm</td>
<td>Region 13 – Brazil</td>
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<tr>
<td>8:00 am – 5:00 pm</td>
<td><strong>Region 2</strong>– North Central North America</td>
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<td>12:00 pm – 5:30 pm</td>
<td>Registration</td>
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<td>12:00 pm – 1:00 pm</td>
<td>Networking Lunch</td>
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<td>1:00 pm – 5:00 pm</td>
<td><strong>Region 1</strong> – Northwest North America</td>
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### Thursday, 26 October 2017

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<tr>
<td>7:30 am – 5:30 pm</td>
<td>Registration / PMI® Bookstore</td>
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**LIM 101: First-Time Attendee Breakfast**

- Elizabeth Borges, PMP, Chapter Member Advisory Group (CMAG) and PMI Leadership Institute Master Class (LIMC) Alumni
- Kristin Hodgson, Manager, Chapter Development – North America, PMI
- Joanne Lynch, Manager, Volunteer Programs and Services, PMI
- Nathan Price, PMP, Chapter Member Advisory Group (CMAG)
- Melissa Raffel, Volunteer Services Specialist, PMI

If this will be your first Leadership Institute Meeting, you won’t want to miss this important breakfast session. Hear from experienced PMI staff and volunteers on how you can use the available tools and resources to make this a great learning experience!

*Please Note:* This breakfast is for first-time LIM attendees, and pre-registration is required.

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<th>Time</th>
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<tr>
<td>7:30 am – 8:45 am</td>
<td>Networking Breakfast/Coffee Service/Leader’s Edge</td>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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| 9:00 am – 10:15 am | Leadership Institute Meeting Opening General Session  
- Welcoming Remarks: Michael DePrisco, Vice President, Global Membership and Chapters  
- Welcome to the Lim/Introduction of PMI Board of Directors: Mark Dickson, PMP, Board Chair, 2017 PMI Board of Directors  
- A Message from PMI: Mark A. Langley, President and CEO |
| 10:15 – 10:45 am | Networking Break/Leader’s Edge                                                                   |
| 10:45 am – 12:15 pm | Leadership Institute Meeting Opening Keynote Session  
- Welcome to Chicago: Jonathan Lee, PMP, President, PMI Chicagoland Chapter and PMI Leadership Institute Master Class (LIMC) Alumni  
- Opening Keynote: “Harnessing Your Power to Create Change” by Derreck Kayongo, Business Visionary, Global Soap Project Founder & CEO of the Center for the Civil and Human Rights  
As Founder of the Global Soap Project, Derreck Kayongo has built a multi-million dollar venture which takes recycled soap and distributes it through global health programs to people who lack access to it around the world. During this emotional keynote session, he will break down the key factors that have led to his personal success—(S.E.L.F.) Service, Education, Leadership and Faith—and will share his account of life as a Ugandan refugee and the turning point which lead him to a brilliant transformation as a social entrepreneur. Mr. Kayongo will call upon us to stop complaining and to start taking responsibility, to consistently seek opportunities to improve, and most importantly, to maintain faith in yourself and your team to create an environment where everyone is empowered to thrive. He will bring us on an emotional journey—there will be tears of joy, but most of the time, laughter. But every time, the story is real.  
- Wrap-Up: Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG) |
| 12:15 pm – 1:45 pm | 2017 Chapter Awards Program/Leadership Institute Master Class Graduation Ceremony and Luncheon  
You won’t want to be late for Thursday’s Awards Luncheon! We will be announcing the recipients of the 2017 PMI Chapter Awards and cheering on the graduating class of the Leadership Institute Master Class (LIMC). Join us on Thursday evening for a celebratory reception in honor of the chapter winners and LIMC graduates. |
| 2:00 pm – 3:15 pm | Concurrent Educational Sessions                                                                |
|                 | **ACADEMIC TRACK**  
Engaging the Next Generation of Millennials and New Professionals  
- Kate Duncan, Academic Programs Specialist, PMI  
- Ashley Forsyth, Academic Programs Specialist, PMI  
Is your chapter interested in engaging with local university students? Are you trying to figure out how to include students and young professionals in your chapter events and leadership? Join us for a presentation and practical exercises to assist your chapter with academic outreach and engagement with young professionals. |
|                 | **ASSOCIATION GOVERNANCE TRACK**  
Strategies for Onboarding: How to Accelerate through the Transition Process  
- Elizabeth Borges, PMP, Chapter Member Advisory Group (CMAG) and PMI Leadership Institute Master Class (LIMC) Alumni  
- Nathan Price, PMP, Chapter Member Advisory Group (CMAG)  
As a new chapter leader with a new role, one of your most significant challenges is to rapidly transition into this role. How can you accelerate through the onboarding process? How can you avoid a “bad transition?” How can you provide value to your chapter as quickly as possible? The objective of this session is to focus on how you can effectively transition into this new role. The presenters will use the PMI Chapter Leaders’ Guide: Strategies for Onboarding and Transitioning to discuss check lists, strategies, tips and best practices that leaders can use to help transition into their new roles faster and more effectively. |
|                 | **FINANCIAL MANAGEMENT TRACK**  
Chapter Finances 101: Overview of the Finance Role in a Chapter  
Michael Flint, PMP, Chapter Member Advisory Group (CMAG)  
This session will provide an overview of the finance role in a chapter and will highlight frequently encountered scenarios related to PMI chapter financial management, audits and operational reporting to stakeholders and institutions. Chapter leaders who are responsible for budget development and/or budget oversight, accounting, auditing and payment processing as well as chapter leaders who hold or have held a role related to finance in the past are encouraged to attend this session and contribute to the discussion. |
|                 | **LEADERSHIP DEVELOPMENT TRACK**  
People Don’t Come with Warning Labels: Dealing with Difficult People  
Lori Klinka, Speaker, Trainer, Speaking Coach and Member of National Speakers Association  
In this session, Ms. Klinka uses humorous characterizations to help people learn to resolve conflict and create a more productive work environment. Whether it be in your professional job or in your role in your chapter, we all |
have to deal with difficult people. The goal of this session is to have you leave with specific skills that will have a
dramatic impact on your relationships. You will:

- Understand why people are difficult
- Learn specific techniques for dealing with different types of difficult people
- Create a more positive and productive work environment with improved morale and greater job satisfaction
- Be able to resolve conflict and improve communication
- Decrease stress for yourself and others, which results in higher productivity

MARKETING & COMMUNICATIONS TRACK
Leveraging the New PMI Initiatives for Your Chapter Marketing
Andrea Greene, Manager, Retention Marketing, PMI

MEMBERSHIP TRACK
Growing Your Membership: The PMI Toronto Chapter Business Analysis Success Story
- David P. Bieg, Program Manager, PMI
- Marc Blanchette, PMP, President, PMI Toronto Chapter
- Cheryl Lee, PMI-PBA, PMP, BA Community Chair, PMI Toronto Chapter
Attend this session to learn how to increase your chapter membership by setting up a Business Analysis (BA) community of practice or expanding your reach via dedicated BA events. This session will show you how to use an established framework to support the growth of a local community or how to turn your BA community into active members depending on your chapter size. You will hear the success story of how the PMI Toronto Chapter established the first BA community within a PMI chapter and practical advice to incorporate programs, such as business analysis, into your chapter. You will also learn about the numerous business analysis products that PMI offers, including the soon-to-be-published business analysis guide and standard.

MEMBERSHIP TRACK
What Got You Here Won’t Get You There: Engaging the 21st Century Project Manager
Laura Davidson, PMI-RMP, PMP, Past Chair, PMI Atlanta Chapter and PMI Leadership Institute Master Class (LIMC) Alumni
As one of the largest PMI chapters in the world, the PMI Atlanta Chapter has over 4,000 members and offers 10–15 events per month. Chapter volunteers are keenly aware that there is a lot of competition when it comes to professional events and association choices. The chapter surveys members, review events and current trends to offer valuable experiences to its members and community. The chapter teams seek to add value to a population of cross-generational members who work in varying industries with diverse levels of experience. The PMI Atlanta Chapter has changed its leadership structure, and length of terms, and added new volunteer roles and events to meet the growing demands of the membership. This interactive session will give you an opportunity to learn about success stories from the PMI Atlanta Chapter, but more importantly, will give you a chance to collect ideas to take back and apply in your own chapters. Facilitated discussions will inspire collaborative sessions that will turn you into a “tactical strategist.”

MEMBERSHIP TRACK
Passing On the Torch: How to Build a New Age of Membership
- Robert Kurtz, PMI-ACP, PMP, Vice President – Membership, PMI Metropolitan St. Louis Chapter
- Alicia Pino, CAPM, Marketing Vice President, PMI Pikes Peak Regional, Colorado Chapter
- Shaun Simms, PMP, Vice President – Volunteers, PMI Metropolitan St. Louis Chapter
This session will explore the mindset of our younger generation of professionals (millennials) and tactics that PMI chapters can use to increase membership, engagement and volunteers of this generation. Subject matter expertise will be available during the session as two of the three presenters are millennials and vice presidents of their respective chapters. The presenters will provide fresh, innovative ideas for PMI chapters to adopt in order to build a new age of membership.

PMI UPDATES, TOOLS AND RESOURCES TRACK
Using ProjectManagement.com Resources to Increase Chapter and Member Value
Dave Davis, PMI Dayton/Miami Valley, Ohio Chapter
This session will share the approach that the PMI Dayton/Miami Valley, Ohio Chapter is using to increase member value through ProjectManagement.com resources. Attendees will learn the strategy behind the initiative, the roadmap, measure of success, and current evaluation of its success. The initiative includes first raising member awareness of ProjectManagement.com and then raising the desire of members to become involved. This session will look at both the lessons the board learned as well as survey results from members as to how effective ProjectManagement.com initiatives have been in increasing the value of their membership.
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will address the importance of having a volunteer assigned specifically for raising awareness and desire for chapter members to use ProjectManagement.com. Finally, the session will cover the financial and governance resources required to kick off an awareness campaign and will look at the roadmap, future events and collaboration opportunities to grow member value.

### PMI UPDATES, TOOLS AND RESOURCES TRACK

**Aligning Chapter Success to PMI's Strategic Pillars**
- Patricia Garrett, PMI-ACP, PMP, Chapter Member Advisory Group (CMAG)
- Joanne Lynch, Manager, Volunteer Programs & Services, PMI
- Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG)
- Melissa Raffel, PMI Volunteer Services Specialist, PMI

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*Please Note: Due to the nature of this workshop, the session is limited to the first 30 attendees but will be offered at four different times on the agenda.*

### REGION MENTOR TRACK

**Mentor Challenges: Planning and Executing Successful Region Meetings/Keeping Region Meetings Fresh**

*Facilitator: Anca Sluşanschi, PMP, Chapter Member Advisory Group (CMAG) and PMI Leadership Institute Master Class (LIMC) Alumni*

The role of the region mentor in planning and executing a LI Region Meeting may vary, but in all cases—at the very least—they should be supporting, along with the chapter partner, the chapter leaders in presenting a well-organized, engaging event. In this session, mentors will share best practices and experiences that have resulted in successful events.

*Please Note: This session is by invitation only and is not open to LIM attendees.*

### ACADEMIC TRACK

**What Can the PMI Educational Foundation Do for Your Chapter? Take Our “Post-It Note Challenge” and Find Out!**
- Gina Abudi, Chair, PMIEF Community Engagement Committee and PMI Leadership Institute Master Class (LIMC) Alumni
- Marge Combe, Chair, PMIEF Board of Directors

Get to know the PMI Educational Foundation in this interactive session. Grab a post-it pad at the session door and use it as your guide to engage in a workshop-style session exploring how chapters can deliver member value through engagement with PMIEF. What can PMIEF do for you? Find out here. Attendees will learn about PMIEF’s grants and scholarships, awards program and no-cost, multi-language project management resources. Chapter leaders will also have an opportunity to discuss opportunities and challenges around implementing a social good strategy in their chapter. A great session for first-time LIM attendees and those new to PMIEF!

### ASSOCIATION GOVERNANCE TRACK

**A Quest to the Land of Succession Planning**

*Todd Jones, PMI-ACP, PMP, Programs Vice Chair, PMI Northeast Ohio Chapter and PMI Leadership Institute Master Class (LIMC) Alumni*

Once upon a time, in a faraway chapter, there lived a board. This board understood it was responsible to the members of the community to provide knowledge, networking and PDUs. Additionally, the board knew it must sustain the chapter by delivering an implementable strategic plan and organized succession planning. This session will tell the story of the PMI Northeast Ohio Chapter’s journey to the distant land of succession planning. Together, we will learn how the board slayed the dragon of the status quo by creating a strategic plan, crossed the valley of misalignment by modifying the governance board structure and found the holy grail of filled leadership positions by improving the volunteer culture. Attendees will be equipped to begin their own quest to the land of succession planning. Come along on the journey to discover if they will “live happily ever after.”

### ASSOCIATION GOVERNANCE TRACK

**A Guide to Governance for Chapter Leaders**
- Judy Brennan, Chapter Partner, PMI
- Theresa Luebcke, PMP, Region Mentor, Region 6
PMI chapter leaders have a wide range of responsibilities and encounter many challenges as they balance the needs of the members and the requirements for governing a not-for-profit organization. This session will focus on frequently asked questions and challenges encountered with specific focus on charter agreement, by-laws and nominations, and elections. Attendees will also have the opportunity to learn more about the tools and resources available and will also share and explore ways to adapt/implement best practices.

**FINANCIAL MANAGEMENT TRACK**

**Chapter Finances 201: Financial Responsibilities for the Chapter**

- Michael Flint, PMP, Chapter Member Advisory Group (CMAG)
- Ron MacDonald, Chapter Partner, PMI

This session will be focused on the development of a solid financial plan for the chapter, which will include the annual planning process leading to a budget and the budget-tracking process. It will also cover policies that should be adopted, including reserves, reporting requirements (monthly, quarterly and annual reports) and regulatory reporting.

**LEADERSHIP DEVELOPMENT TRACK**

**Not Us Vs. Them: Values and Ethics Across Cultures**

- Mohamed Khalifa Hassan, PMI-ACP, PMI-PBA, PMI-RMP, PMI-SP, PMP, PgMP, PfMP, PMI Ethics Member Advisory Group and Leadership Institute Master Class (LIMC) Alumni
- John Watson, PMI-ACP, PMP, PMI Ethics Member Advisory Group and Leadership Institute Master Class (LIMC) Alumni

In this dynamic session, the presenters will elaborate ways in which PMI chapters can increase and maintain their membership by leveraging the core values of their stakeholders. In this age of globalization, many chapters work with people from different cultures and personalities. This impacts perspectives around ethical behaviors—even within the same chapter. Using the Lewis Model of Culture, the presenters will explain how several hundred national and regional cultures of the world can be roughly classified into three groups: task-oriented (linear-active); people oriented (multi-active); and introverted, respect-oriented listeners (reactive culture). These categorizations enable us to predict a culture’s behavior, clarify why people do what they do, avoid being offensive, search for some kind of unity, standardize policies and understand the ethical behavior.

**LEADERSHIP DEVELOPMENT TRACK**

**Communicate for the Win**

Lori Klinka, Member of the National Speakers Association

In this highly-interactive session, Ms. Klinka uses humorous characterizations to help people improve communication skills in any situation. She builds on peoples’ strengths to help them think on their feet under pressure. As a result of this session, you will be able to:

- Communicate with confidence and ease whether speaking to one person or one hundred
- Build greater rapport with your audience
- Organize and write content that flows easily
- See more results than ever before in your speaking

**PMI UPDATES, TOOLS AND RESOURCES TRACK**

**Aligning Chapter Success to PMI’s Strategic Pillars**

- Patricia Garrett, PMI-ACP, PMP, Chapter Member Advisory Group (CMAG)
- Linda Jones, Volunteer Programs Specialist, PMI
- Joanne Lynch, Manager, Volunteer Programs & Services, PMI
- Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG)

As part of PMI's strategic refresh, we introduced a new and evolving focus for the Institute: the strategic pillars. In this session, you will gain a better understanding of the pillars, (strategic focus, customer centricity and organizational agility) learn how other chapters are aligning to the pillars, and discover new ways to incorporate the strategic pillars into your chapter planning and operations. This is a highly-interactive session that will result in attendee-generated ideas you can use right away.

*Please Note: Due to the nature of this workshop, the session is limited to the first 30 attendees but will be offered at four different times on the agenda.*

**MARKETING & COMMUNICATIONS TRACK**

**Unleashing the Power of Your First-Year Members**

- Kerry Brooks, Membership Specialist, PMI
- Andrea Greene, Manager, Retention Marketing, PMI

First-year members are the most at risk audience and provide a huge opportunity to increase your chapter retention rates. Attend this session to learn how to market to—and retain—this important group.

**MEMBERSHIP TRACK**

**Rethinking Member Engagement**
- Genevieve Guilmette, PMP, President, PMI Southern New England Chapter
- Carin Salonia, PMP, Past Chair, PMI Southern New England Chapter
- Neil Weiss, PMP, Professional Development Director, PMI Southern New England Chapter

The PMI Southern New England Chapter (SNEC) launched a new member engagement model in 2016 that integrated concepts and thoughts shared by Mark Levin (author of Managing the Membership Experience and Retention Wars). In this session, attendees will learn about this member-focused approach with a structured look at Levin’s four “phases of engagement” and how to bring meaningful change and experiences to your newest members. Using a visual-facilitation approach, attendees will learn how to map the first-year member journey using an example of the member mindset and the creation of meaningful tactics to enable the newest of members to get the most value out of their membership. Attendees will hear how SNEC introduced specific strategies in various “phases of engagement” through the introduction of a new member welcome kit, an enhanced new member orientation and communications in a focused manner, moving from talking about the chapter to talking about the member and profiling their needs. The session will leverage PMI marketing materials and attendees will learn how to craft a new look for the newest members in their chapter.

**PMI UPDATES, TOOLS AND RESOURCES TRACK**
**PMI and Chapters: Evolving the Profession Together**
- Kristin Hodgson, Manager, Chapter Development – North America, PMI
- Brantlee Underhill, Director, Global Chapters, PMI

The Project Management Institute was founded 48 years ago to help establish, build and mature the careers and credibility of project management practitioners. Chapters were created to do the same while growing local member communities. PMI members stay engaged for the knowledge and networking opportunities, and PMI chapters are a primary destination for project management practitioners to attain career development education and enhancement. As the local “face of PMI,” nearly 300 chapters around the world open the doors for project management practitioners and enable them to learn the skills necessary to be effective and successful project leaders. This session will explore how the local chapter connection blends with the global strategy of PMI. Volunteer leaders are guided by the Catalog of Core and Extended Services to provide unique chapter value delivery, and integrate their plans with the objectives of the Institute. As we look back on the past 48 years, PMI chapters have been a fundamental reason for the success of PMI and of the profession. Let’s look ahead toward the next 50 years to see how we can continue to advance the project management profession…together.

**PROFESSIONAL DEVELOPMENT TRACK**
**Meet Them at Home: Reinventing Professional Development Offerings for Your Chapter**
Elizabeth Price, PMP, EVP Professional Development, PMI Northern Utah Chapter

Reinventing your chapter’s professional development offerings to retain member interest and participation requires data and creativity. This session will focus on collecting and interpreting data to catapult chapters into the creative firestorm of new and creative offerings that meet members’ needs.

5:00 pm – 7:00 pm
**Networking Social Hour**
Join the PMI Board of Directors, PMI staff and your chapter colleagues in a celebratory social hour in honor of the PMI Chapter Award winners and 2017 graduates of the PMI Leadership Institute Master Class (LIMC).

**Friday, 27 October 2017**

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<th>Time</th>
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| 7:45 am – 8:15 am | **Make the Most of Your LIM Experience with a Relaxed Mind through Meditation**  
Brantlee Underhill, Director, Global Chapters, PMI  
We know how easy it can be to slip into autopilot when attending a conference – hustling in and out of sessions, responding to emails, tweets and phone calls, maximizing every moment with your volunteering colleagues and hoping that the next break or meal is a tasty – and healthy – one! In the midst of all of this multi-tasking, we may find ourselves in mental and physical overload. We want to offer you a few minutes to clear and reboot your mind space. In this 30-minute session, have a seat, close your eyes, hit the pause button, take some deep breaths, and reconnect to your mindful state of being actively aware in each moment for you to make the most of your Leadership Institute Meeting experience.  
*Please Note: This session is optional and seating is limited. Availability is based on a first-come, first-serve basis and attendees will not be permitted to join the session late.* |
| 8:00 am – 5:00 pm | **Registration / PMI® Bookstore**                                           |
| 8:00 am – 8:45 am | **Networking Breakfast/Coffee Service/Leader’s Edge**                      |
| 9:00 am – 10:15 am | **Leadership Institute Keynote Session**                                   
- Welcome:  
  - Dino Butorac, PMP, Chapter Member Advisory Group (CMAG) and PMI Leadership Institute Master Class (LIMC) Alumni |

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Patricia Garrett, PMI-ACP, PMP, Chapter Member Advisory Group (CMAG)

- **Keynote:** “Lessons in Leadership” by Carey Lohrenz, First Female U.S. Navy F-14 Tomcat Fighter Pilot
  As the first female U.S. Navy F-14 Tomcat fighter pilot, Carey Lohrenz knows what it takes to succeed in one of the most demanding, extreme environments imaginable: the cockpit at Mach 2. As a former combat-mission-ready U.S. Navy pilot, Ms. Lohrenz is an expert at working in fast-moving, dynamic environments, where inconsistent execution can generate catastrophic results. By seamlessly translating the lessons she learned to challenges in business, she provides applicable insight on market change, customer evolution and the importance of adaptability. Author of the Wall Street Journal bestselling book, *Fearless Leadership: High-Performance Lessons from the Flight Deck*, she outlines her experiences and advice on how to supercharge performance in today’s competitive business environments.

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**ACADEMIC TRACK**

**Successful Stories: Academic Outreach in Higher Education**
- Heather Ramsey, Manager, Academic Programs, PMI
- Ashley Forsyth, Academic Programs Specialist, PMI

**Panelists:**
- Marc Blanchette, PMP, President, PMI Toronto Chapter
- Luis Miguel Cotrina Malca, PMP, President, PMI Cajamarca, Peru Chapter
- Michael Spead, PMP, Vice President, Education, PMI Washington, DC Chapter

Join us for an interactive panel discussion. Chapter volunteers will discuss outreach activities they have engaged in to build relationships with university faculty and students including the value realized by the chapter and lessons learned.

**ASSOCIATION GOVERNANCE TRACK**

**Chapters, Core Values and Cultures**
- Tashfeen Riaz, PMP, Vice President, Professional Development, Islamabad, Pakistan Chapter and Leadership Institute Master Class (LIMC) Alumni
- Diogo Magalhaes, PMP, Chief Communications Officer, Canada’s Technology Triangle Chapter and Leadership Institute Master Class (LIMC) Alumni
- Brantlee Underhill, Director, Global Chapters, PMI

The culture of your chapter is conveyed through the beliefs and behaviors of your board and the members. What does your chapter’s culture say about its health? What can you, as a chapter leader, do to influence the culture? At the conclusion of this session, participants will be able to:
- Restate PMI’s core values
- Express how culture and core values can impact the success of a chapter
- Describe how your chapter can embrace a culture that delivers positive results

**FINANCIAL MANAGEMENT TRACK**

**Looking at Finance of a PMI Chapter from a PMBOK® Guide View: A Case Study by the PMI Toronto Chapter**
Steve Wong, PMP, Director of Finance, PMI Toronto Chapter

Every chapter is running as an independent, registered entity in their jurisdiction. The finances of each chapter may become a hurdle in getting some volunteers to get involved. This session introduces the basics of finance—with the *PMBOK® Guide* as a basis to start the dialogue, we will discuss what and how chapter finances are managed. The fiscal year will be treated as a "project" to draw similar paths to make it easier for project managers to understand.

**LEADERSHIP DEVELOPMENT TRACK**

**How to Be a REAL Success**
J. Israel Greene, Certified Speaker, Teacher, Coach, The John Maxwell Group

Success is not a destination. It is a process—a lifelong strategy of building on strengths, minimizing weaknesses, and focusing on the people and points of life that are most important. In this session, J. Israel Greene will help you understand the keys you need to succeed in life. Whether you are wearing your professional hat or your PMI chapter leader hat, you will achieve great things by understanding four very important success building areas: relationships, equipping, attitude, and leadership.

**MARKETING & COMMUNICATIONS TRACK**

**Leveraging the Full Power of the PMI Brand**
Andrea Greene, Manager, Retention Marketing, PMI

Attend this session to learn how you can be a PMI brand ambassador and develop a value proposition for your chapter.
MEMBERSHIP TRACK
Membership and Certification Program Dependencies: Leading with Certification to Grow, Engage and Retain Members
- Kerry Brooks, Membership Specialist, PMI
- Simona Fallavollita, Certification Specialist, PMI
- Anca Sluşanschi, PMP, Chapter Member Advisory Group (CMAG) and PMI Leadership Institute Master Class (LIMC) Alumni

As the face-to-face representative of PMI, the chapter plays a vital role in communicating and delivering the value members expect to receive from the Institute. Many individuals come to PMI to advance their careers with a PMI certification. As we grow the partnership between PMI and your chapter together, we will discuss the linkages between PMI certification and membership, highlighting the positioning and programming at both the global and local chapter levels that are designed to help you deliver against the Catalog of Core and Extended Services. This session will also include interactive discussion with your colleagues on ways to grow, engage and retain membership in chapters.

PMI UPDATES, TOOLS AND RESOURCES TRACK
Aligning Chapter Success to PMI’s Strategic Pillars
- Patricia Garrett, PMI-ACP, PMP, Chapter Member Advisory Group (CMAG)
- Linda Jones, Volunteer Programs Specialist, PMI
- Joanne Lynch, Manager, Volunteer Programs & Services, PMI
- Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG)

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PMI UPDATES, TOOLS AND RESOURCES TRACK
Reflections on the History of Project Management and PMI *
James R. Snyder, PMI Founder, PMI Fellow

To understand the project management practitioner in the future, we need to have an understanding of how we have matured and changed from the project schedulers and planners of the 1960s. Where did we come from and how did PMI play a role in building a new profession? This session will offer a look back at the people, places and environment and will not only tell us about our history, but will help us to understand where project management may be headed and how you—as PMI chapter leaders—can influence that direction. This session will take you back to the past and bring you up-to-date on the present as well as help you understand the motivation for the founding of PMI and the direction it has taken along the way. We will specifically cover:
- The History of PMI—Where it All Began and Why
- The Early Years—Moving to a Strategic Board and the Importance of Establishing a Professional Association
- The Roots of Volunteer Service Excellence—PMI’s Core Value

PROFESSIONAL DEVELOPMENT TRACK
Maximize the Value of Chapter Membership through Speed Mentoring
- Muhammad A.B. Ilyas, PMI-ACP, PMI-RMP, PMI-SP, PMP, PgMP, PMI Registered Education Provider Program Advisory Group
- Mohamed Khalifa Hassan, PMI-ACP, PMI-PBA, PMI-RMP, PMI-SP, PMP, PgMP, PfMP, PMI Ethics Member Advisory Group and Leadership Institute Master Class Graduate

Speed mentoring has become one of the most popular techniques providing learning value for both the mentors and mentees. Some PMI chapters have started organizing speed mentoring sessions for the benefit of their members. Attend this high-energy, step-by-step session during which the facilitators will leverage their experience in conducting speed mentoring events to help you practice, plan and conduct speed mentoring sessions for your chapter members.

VOLUNTEER ENGAGEMENT TRACK
From Recruitment to Recognition: Tips and Tools to Support a Successful Volunteer Program
- Jamie Gray, Volunteer Services Specialist, PMI
- Melissa Raffel, Volunteer Services Specialist, PMI

As a chapter leader, you have already made the leap from member to engaged volunteer. But your role may require that you recruit, organize and lead other volunteers. This interactive session will help answer the following questions:
- What is a “volunteer pipeline” and why is it important to your chapter?
- What are some best practices for retaining and developing your volunteers?
- What tools are available to support you as you engage chapter volunteers?

Join us for an introduction to the history and structure of volunteers at PMI and learn how your chapter can make use of tools such as the Volunteer Relationship Management System (VRMS), Marketing Portal and the new Volunteer Resource Center in order to promote engagement and manage volunteers effectively.

### TECHNOLOGY TRACK

**Technology Services for Your Chapter**
- Mike Liddy, Chapter System Support Specialist, PMI
- Johnny Mo, PMP, PMI Technology Member Advisory Group (TechMAG)

This session will include discussions of why technology matters for today’s PMI chapters. It will provide an overview of tools that chapters use such as event management, CRM, websites and conferencing services. The session will also discuss best practices for connecting to PMI Global for technology needs of chapters and share a vision for the future of technology, specifically related to chapters.

#### 12:00 pm – 1:30 pm

**Networking Lunch/Leader’s Edge**

#### 1:00 pm – 1:20 pm

**Oxygenate Your Being State!**
Brantlee Underhill, Director, Global Chapters, PMI

Treat yourself to improved brain function and feel more relaxed as a result. We’ll sit easily and practice breathing techniques that help neutralize the post-lunch plunge and prepare your cognition for more learning opportunities!

*Please Note:* This session is optional and seating is limited. Availability is based on a first-come, first-serve basis and attendees will not be permitted to join the session late.

#### 1:30 pm – 2:45 pm

**Concurrent Educational Sessions**

### ACADEMIC TRACK

**The Value Equation: How to Achieve Core Services through Social Good Initiatives**
- Gina Abudi, Chair, PMIEF Community Engagement Committee and PMI Leadership Institute Master Class (LIMC) Alumni
- Walter Ginevri, PMI-ACP, PMI-PBA, PMI-RMP, PMI-SP, PMP, PgMP, PfMP, PMIEF Board of Directors
- Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG)
- Galen Townson, PMP, Region Mentor, Region 10

Gain real-life perspectives of how integrating social good initiatives will contribute to the achievement of your chapter’s core services. You will hear from voices across our PMI community with perspectives from the chapter leaders and volunteers, as well as PMI Educational Foundational (PMIEF) volunteers and leaders. They will share outcomes of exploring the value equation between PMI global chapters and the PMIEF. An ad-hoc committee—comprised of representatives from PMI chapters, region mentors, the Chapter Member Advisory Group (CMAG), and the PMI Educational Foundation Board of Directors and Community Engagement Committee—have been working together to create a blueprint of how PMI chapters and the PMIEF can work together to achieve optimal results. Never before has the relationship between PMI’s chapters and PMI’s philanthropic arm been so clear and collaborative. Join this session and learn about this diverse group’s challenging task and outcomes. With so many diverse roles represented in the conversation, this session is sure to provide valuable takeaways for all of PMI’s chapter leaders.

### ASSOCIATION GOVERNANCE TRACK

**Essential Guide for New Chapter Leaders**
- Joyce Kelley, Chapter Partner, PMI
- April Burton, Chapter Partner, PMI

As a new chapter leader, there is much to learn in order to effectively manage your responsibilities and lead your volunteer team. PMI’s Catalog of Core Services helps chapters understand what members expect to receive when they join their chapter. This session will direct chapter leaders to the resources to build a membership community and support members in their project management career development. The task of managing your chapter and volunteers can initially feel overwhelming. You will leave this session equipped with the essential information and resources you need to know (or at least know how to find) to effectively manage and integrate your chapter’s activities.

### FINANCIAL MANAGEMENT TRACK

**Unconference Session: Chapter Financial Challenges**
- Michael Flint, PMP, Chapter Member Advisory Group (CMAG)
- Ron MacDonald, Chapter Partner, PMI
- Larissa Moran, Chapter Administrator, PMI
This session gives you the opportunity to participate as a speaker, network with peers, share ideas and get answers to questions in an open-forum format. Come with a topic in mind, or see what others want to discuss in regard to finance roles. Facilitators will help organize the room and get the discussions started.

### MEMBERSHIP TRACK
**How to Make PMI More Attractive for Students and the Younger Generation: A Case Study by the PMI France Chapter**
- Bruno Laude, PMP, President, PMI France Chapter
- Elodie Marinier, Project Manager, PMI France Chapter

The value of a PMI membership and involvement with a local PMI chapter might not be as evident to students and the younger generation. This session will discuss how the PMI France Chapter and a young project manager (Elodie Marinier, co-presenter of this session) managed a nationwide project to make PMI more attractive for the younger generation. The session will explore how the chapter organized a forum in project management dedicated to students. The objective of the forum was to demonstrate the value of PMI and project management skills to students and to increase their membership to PMI. The presenters will share information about the organization of the forum and lessons learned by senior project managers and students.

### PMI UPDATES, TOOLS AND RESOURCES TRACK
**Operation: Qualify for Hire—What’s New with the PMI Military Initiative**
- Dave P. Bieg, Program Manager, PMI
- Kerry Brooks, Membership Specialist, PMI
- Sandra Cobb, PMP, PgMP, PfMP, Trustee, PMI Tampa Bay Chapter
- Jay Hicks, Military Liaison, PMI Tampa Bay Chapter

In this session, PMI staff will update chapter leaders on the latest progress with PMI’s “Operation: Qualify for Hire” program. Topics to be covered include new updates on the program offering, the role of the PMI Military Concierge, a new testing option for the military community, new partnerships and additional resources for the program. There will also be a question and answer session for leaders to inquire in more detail about the program.

### VOLUNTEER ENGAGEMENT TRACK
**Using the VRMS to Effectively Fuel Your Chapter Volunteer Recruitment Efforts**
**Facilitator:** Jamie Gray, Volunteer Services Specialist, PMI
**Panelists:**
- André Ricardi, PMP, Programs Director, PMI Sao Paulo, Brazil Chapter
- Shaun Simms, PMP, Vice President – Volunteers, PMI Metropolitan St. Louis Chapter
- Anthony Snead, PMP, Volunteer Director, PMI United Kingdom Chapter

Does your chapter have problems recruiting volunteers, or do you lose track of who has offered to help? Do your chapter members have problems finding information about the available volunteer roles in your chapter? If these are familiar scenarios in your chapter, then you should consider using the Volunteer Relationship Management System (VRMS) to help support recruitment of your chapter volunteers. Using this no-cost system will allow you to better organize your chapter volunteer opportunities as well as gauge chapter member interest in volunteerism. Join us for an interactive session to learn more about the benefits of adopting the VRMS, and hear from chapters who are using the system effectively as part of their chapter strategy.

### REGION MENTOR TRACK
**Chapter Business: Value Propositions for Chapters**
JoAnn Boehm, PMI-ACP, PMP, Region Mentor, Region 4 and PMI Leadership Institute Master Class (LIMC) Alumni

Most region mentors talk to their chapters about value propositions and why chapters need to have one. This session will help mentors take the topic to the next level and prepare mentors to help chapters understand why members join and what makes them stay. We will also show how to use that information to create the chapter’s value proposition and how to incorporate it into your chapter’s annual planning.

**Please Note:** This session is by invitation only and is not open to LIM attendees.

1:30 pm – 4:00 pm
**LEADERSHIP DEVELOPMENT TRACK**
**Everyone Communicates. Few Connect.**
J. Israel Greene, Certified Speaker, Teacher, Coach, The John Maxwell Group
World-renowned leadership expert John C. Maxwell says if you want to succeed, you must learn how to connect with people. And while it may seem like some folks are just born with it, the fact is anyone can learn how to make every communication an opportunity for a powerful connection. In this session, J. Israel Greene will share the five principles and five practices to develop the crucial skill of connecting, including:

- Finding Common Ground
- Keeping Your Communication Simple
- Capturing People’s Interest
- Inspiring People
- Staying Authentic in All Your Relationships

The ability to connect with others is a major determining factor in reaching your full potential. It’s no secret! Connecting is a skill you can learn and apply in your personal, professional, and family relationships—and you can start now by participating in this session.

### LEADERSHIP DEVELOPMENT TRACK

**Leadership + Positive Mental Attitude (PMA) = Success**

Joshua Szarek, PMP, Director at Large, PMI Wine Country Chapter

In this workshop, we will review two concepts: leadership and PMA (positive mental attitude) and then discover why together, anything is possible! Leadership is the process of influencing others to accomplish a mission or task by providing purpose, motivation and direction. We will discuss various leadership styles, learn the difference between the Golden Rule and Platinum Rule, discover our own personality styles as well as recognize the multitude of styles in others. PMA is one’s ability to maintain belief that he/she can transform or change a tough situation into something better. We will discuss why it is the single ingredient that separates average leaders from great leaders, what it means, from where it was derived and who the audience is. We will also review the common myths about PMA. Attendees will:

- Walk away with a better understanding of leadership and the various styles
- Learn a new concept in PMA and why it is so important
- Discover how to make a negative person, team, situation, event, task or project better and successful

### ASSOCIATION GOVERNANCE TRACK

**Practical Methodologies: Aligning and Monitoring Annual Business Planning by Utilizing Project Management Tools and Techniques**

Marc Blanchette, PMP, President, PMI Toronto Chapter

Lynn Shannon, PMP, Region Mentor, Region 3

At the beginning of each fiscal year, chapter board members get together and prepare their chapter’s business plans. Lessons learned are reviewed. Teams are formed. Portfolios are assigned. Goals are agreed to. Budgets are approved. Moral is high. Then, as the year progresses, tactical issues start to take over monthly board meetings. New initiatives start to creep in. Boards start arguing for resources and funds. Some board members try to pick up the slack, become burned out and frustrated. Momentum on key goals starts to drop. Does this scenario sound familiar? As project managers, in our day-to-day professional lives, we handle these issues daily. We juggle scope, time and costs. We manage stakeholder expectations. We monitor and report on progress. We use our softer skills to build consensus, compromises and proactively try to avoid conflicts—and we are constantly reorganizing and reprioritizing goals. Join this session to learn how to use the tools and techniques we use in our daily roles to help us achieve our chapter’s goals.

### FINANCIAL MANAGEMENT TRACK

**Implementing High Financial and Governance Performance: A Case Study by the PMI Rio Grande do Sul Chapter**

Thiago Regal, PMP, PfMP, Past President, PMI Rio Grande do Sul Chapter, LIMC Alumni

Rogerio Severo, Advisory Board President and Past Finance VP, PMI Rio Grande do Sul Chapter
In this session, attendees will learn very effective ways to organize chapter finances, having lightweight and effective processes that provide great control while saving volunteer time. By sharing the experiences, successes and failures of the PMI Rio Grande do Sul Chapter, the presenters will demonstrate that it is possible to have a high financial-maturity level—even in small chapters. They will show effective ways to organize your bills, to get control over and improve your main revenue sources, and to make sure you are really investing in the right projects. They will also show how to make sure you have a reliable financial baseline that can be compared to past baselines to forecast future financial performance.

MARTKETING & COMMUNICATIONS TRACK
Getting Sponsorship Dollars—It’s Not Like Pulling Teeth: A Case Study by the PMI Toronto Chapter
Robert Heggie, PMP, Past President, PMI Toronto Chapter
Thinking about raising money for your chapter is about as enticing as an upcoming trip to the dentist. You know you have to do it, it’s uncomfortable for you and there is likely to be some pulling of teeth! How do you approach a potential sponsor? How do you get money from them? Sponsors are primarily looking to exploit your membership list in order to sell their goods and services, so you need to speak to that sort of nasty stuff as you also sell the great things that your chapter does for its membership. This session is about approaching sponsors, getting their interest, composing a deal and closing that deal.

MEMBERSHIP TRACK
Implementing an Effective Formal Mentoring Program: A Case Study by the PMI Chicagoland Chapter
Skip Depner, PMP, Director Mentoring, PMI Chicagoland Chapter
A formal mentoring program can have a very positive impact on a PMI chapter because it has something to offer a diversity of members. For relative newcomers, it is an opportunity for personal development or to be guided through a particularly challenging situation; for the experienced Project Management Professional (PMP)® certification holder, it offers an opportunity to give back to the profession and infuse the next generation with years of experience and wisdom. It not only offers opportunities to volunteer in a variety of ways within the program, but also energizes participants to become more active in all facets of the chapter. But for the benefits to be realized, the program must be effectively and efficiently run, otherwise it will constrain demand. This presentation will highlight some best practices for doing just that. This session will highlight how the PMI Chicagoland Chapter: 1) communicates the mentoring program/session to the membership, 2) onboards applicants into the program/session, 3) selects one-on-one teams, and 4) administers the chapter’s 20-week session including three group events.

PMI UPDATES, TOOLS AND RESOURCES TRACK
Success in Engaging the Military Community: Chapter Case Studies
- Dave P. Bieg, Program Manager, PMI
- Kerry Brooks, Membership Specialist, PMI
- Aldo Calvi, PMP, Military Liaison, PMI Augusta Aiken Chapter
- Andy Walker, PMI Washington, DC Chapter
Knowing how to reach out and engage the military community successfully is not always easy. Come join us for a panel discussion in which several of PMI’s chapters discuss their outreach programs, what they are doing for the military community, and how you can scale their efforts to create your own chapter military outreach program. Several panelists will present their programs focusing on specific aspects of their outreach. We will then open it up to the audience for a question and answer session.

PROFESSIONAL DEVELOPMENT TRACK
Executing a Successful Virtual Meeting: A Case Study by the PMI Kentuckiana Chapter
- Raghunath Garre, PMP, Past President, PMI Kentuckiana Chapter
- Howard Siever, PMP, President, PMI Kentuckiana Chapter
This session will explore the PMI Kentuckiana Chapter’s journey to go from the idea of providing virtual meetings to executing the idea to provide PDUs to all remote members. Virtual meetings provide a channel for participation by members who either cannot break away from work or are located too far away from the meeting site. The presenters will discuss how member engagement increases by adding virtual meetings to a chapter’s arsenal of services provided.

TECHNOLOGY TRACK
Using a Digital Platform to Enhance the Delivery and Promotion of Service: A Case Study by the PMI Bangalore India Chapter
Praveen Jangira, PMP, Vice President Technology, PMI Bangalore India Chapter
In this session, the PMI Bangalore India Chapter will share their best practices on how to leverage technology that will not only help in maximizing your chapter’s potential, but will also help in achieving more with less. The chapter will share learnings and help attendees understand how they can use similar platforms, make a difference, and be more agile. The session will cover live webcasts and how they can add value to your programs.
and help increase your reach; mobile apps and how they can help your chapter to stay relevant; communication channels; online collaboration; and various other technology tools.

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<tr>
<th>Time</th>
<th>Session</th>
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<tr>
<td>4:15 pm – 5:00 pm</td>
<td>Chapter Learn &amp; Share Sessions</td>
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<td><strong>ASSOCIATION GOVERNANCE TRACK</strong></td>
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<td><strong>Transforming Your Board's Transition Process: A Case Study by the PMI Buffalo, NY Chapter</strong></td>
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<td>- JoAnn Boehm, PMI-ACP, PMP, Region Mentor, Region 4 and PMI Leadership Institute Master Class (LIMC) Alumni</td>
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<td>- Jeffrey Manhardt, PMP, President, PMI Buffalo, NY Chapter and PMI Leadership Institute Master Class (LIMC) Alumni</td>
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<td>During this session, attendees will learn how the PMI Buffalo, NY Chapter transformed its board transition</td>
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<td>process in order to address the lack of a formal orientation of its incoming board members. The chapter made</td>
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<td>changes to its board member terms, introduced transition documents and signoffs, and introduced a formal</td>
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<td>orientation period. The session will cover: past state, problem statement, recommendations for change, benefits of</td>
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<td>future state, transition timeline, transition templates and lessons learned.</td>
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<td><strong>ASSOCIATION GOVERNANCE TRACK</strong></td>
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<td><strong>Executive Outreach – Engaging the Unreachable Executive-Level Leaders: A Case Study by the PMI Chicagoland Chapter</strong></td>
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<td>- Jim Karthan, PMP, Past President, PMI Chicagoland Chapter</td>
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<td>- Amy Martin, PMP, VP Business Outreach, PMI Chicagoland Chapter</td>
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<td>The PMI Chicagoland Chapter has been evolving and supporting executive outreach programs for over 12 years.</td>
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<td>These programs focus on engaging executives with an interest in the project management profession. Chapters can</td>
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<td>realize value in promoting these programs that benefit both chapter leaders and chapter members. This</td>
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<td>session will review the PMI Chicagoland Chapter’s executive outreach program that focuses on executive-level</td>
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<td>collaboration. The session will cover a program overview, chapter value, how to launch, how to maintain, lessons</td>
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<td>learned and chapter governance.</td>
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<td><strong>ASSOCIATION GOVERNANCE TRACK</strong></td>
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<td><strong>Nourishing the Future with Past Achievements: A Case Study by the PMI Montevideo Chapter</strong></td>
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<td>- Gloria Folle, PMP, Shadow Mentor, Region 13, Southern Latin America</td>
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<td>- Cecilia Mato, PMP, Finance Director, PMI Montevideo, Uruguay Chapter</td>
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<td>- Valeria Rodríguez, PMP, President, PMI Montevideo, Uruguay Chapter</td>
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<td>PMI chapters around the world face similar challenges and opportunities. During this session, the PMI Montevideo,</td>
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<td>Uruguay Chapter will share an extraordinary experience of inspiration, leadership and member engagement. The chapter</td>
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<td>published its history in a book to commemorate its 15th anniversary, and the book was given as a gift to all</td>
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<td>attendees and speakers at the Annual International Congress that took place during the 15th anniversary year. In</td>
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<td>addition, all chapter members that did not attend the congress, as well as those who provided input, received a</td>
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<td>copy of the book at different events and occasions. The chapter also used the book for outreach and to attract new</td>
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<td>sponsors.</td>
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<td><strong>MEMBERSHIP TRACK</strong></td>
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<td>**Successful Member Acquisition, Engagement and Retention Programs: Case Studies from the PMI Portland and PMI</td>
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<td>Atlanta Chapters</td>
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<td>- Narasimha Acharya, PMP, Administration Vice Chair, PMI Atlanta Chapter</td>
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<td>- Titu Hariharan, PMP, Programs VP, PMI Portland Chapter</td>
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<td>With PMI’s strategy refresh and the renewed focus on the individual as our most important customer, it becomes</td>
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<td>imperative for chapters to offer effective programs and events that members see as valuable and worth attending or</td>
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<td>participating in. This will enable and sustain growth through acquisition of new members, at the same time</td>
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<td>retaining and motivating committed and experienced leaders to continue to take an active role. Case studies of</td>
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<td>some successful programs at the PMI Portland Chapter and PMI Atlanta Chapter will be presented, which session</td>
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<td>attendees can use as a recipe to implement at their local chapters.</td>
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<td><strong>MEMBERSHIP TRACK</strong></td>
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<td>**Customer Journey Mapping: An Innovative Approach by the PMI Sydney, Australia Chapter to Drive Membership</td>
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<td>Engagement for PMI Chapters**</td>
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<td>- Parikshit Basrur, PMI-ACP, Director at Large, PMI Sydney, Australia Chapter</td>
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<td>- Sandeep Mathur, PMP, PgMP, Director at Large, PMI Sydney, Australia Chapter</td>
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<td>The session will share the learnings from the PMI Sydney, Australia Chapter in ensuring that the services offered</td>
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<td>are relevant to its customer segments. The chapter has used “customer journey mapping” as a framework to identify</td>
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<td>the needs of its members and linked it to the PMI Talent Triangle®. Members are identified as to where they are on</td>
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<td>their professional journey. The segments of the customer’s journey are mapped to the Talent Triangle to identify</td>
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<td>needs at that point. The chapter services are also mapped to the talent triangle.</td>
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**PROFESSIONAL DEVELOPMENT TRACK**

**Hosting a Successful Professional Development Day: A Case Study by the PMI Southern New England Chapter**
Mary Frances Gorgas, PMP, President Elect, PMI Southern New England Chapter

The PMI Southern New England Chapter (SNEC) held its first PDD in 2006. Dubbed “The Passion and Power of Project Management™” to reflect the chapter’s feelings about its profession, the annual full-day conference and half-day workshops offer keynote speakers, breakout sessions across multiple learning tracks, and workshops for in-depth learning—all aligned to the PMI Talent Triangle® and the start, build, advance mindset. Join this session to hear how SNEC approaches its tasks and milestones in order to deliver quality learning to its 700+ attendees, making it a destination event for project management practitioners throughout southern New England.

**PROFESSIONAL DEVELOPMENT TRACK**

**Shoptalk Programs for Chapters and Regions: A Case Study by the PMI Heartland Nebraska / Iowa Chapter and the PMI Madison / South Central Wisconsin Chapter**
- Annemarie Foundling, Professional Development VP, PMI Madison / South Central Wisconsin Chapter
- Rod Hill, PMP, President, PMI Heartland Nebraska / Iowa Chapter

The word “shoptalk” comes from the activity when co-workers or like-minded people gather and talk shop about what they do; thus, shoptalk. Shoptalk programs were based on the concept of student field trips’ location-based learning, and was applied to professional adults, visiting where project management happens. A “shoptalk” at the chapter level is essentially a professional field trip to a local business or corporation for access to a deeper understanding inside the company. The host company provides a panel of project management practitioners and may include a tour, and provides details about the project management culture, structure, processes, developments and opportunities experienced in their organization. A “shoptalk” at the regional level provides chapter leaders a great format to stay connected on timely and relevant topics of interest for collaborative sharing and learning, such as technology, membership and strategic planning. The regional shoptalk is conducted live online with a facilitator and participants who are asked to share one thing they would like to learn, discuss or contribute to the shoptalk discussion topic. Join this session to learn about how these two chapters have successfully implemented shoptalks into their chapters’ offerings.

**TECHNOLOGY TRACK**

**PDU Scanner and PMI Global Integration: A Case Study by the PMI Central Illinois Chapter**
- Matt Jaeger, PMP, Operations VP, PMI Central Illinois Chapter
- Zack Stelly, Director of Information Technology, PMI Central Illinois Chapter

Looking for ways to improve your member experience? What is one of the biggest member inquiries with regard to attending chapter events? How do I get my PDU credit(s)? This session will provide a demonstration of what the PMI Central Illinois Chapter—and some early adopters in Region 2—are implementing to streamline the PDU-capture and submission process for its credential holders.

**VOLUNTEER ENGAGEMENT TRACK**

**Volunteer Profile Mapping – Assessing Your Volunteer Expectations to Reach Higher Performance Teams: A Case Study by the PMI Rio Grande do Sul Chapter**
- Fernando Bartelle, PMP, Director at Large, PMI Rio Grande do Sul Chapter
- Alex Rosa, PMP, Vice President of Membership, PMI Rio Grande do Sul Chapter

This session will share how the PMI Rio Grande do Sul Chapter uses a volunteer profile-mapping system to build great project teams and increase engagement from volunteers. With this free and simple-to-create system, the chapter is able to offer great opportunities for professional development to the community. This session will explore how the chapter is able to allocate team members in the right opportunities; how to build project teams that are highly involved with the chapter; and how to encourage volunteers to offer their services for longer periods of time.

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<tr>
<th>Time</th>
<th>Description</th>
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<tbody>
<tr>
<td>5:00 pm</td>
<td><strong>Free Night in Chicago: Visit Our Host City on Your Own</strong></td>
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<td>Take a break and get out of the convention center to see Chicago on your own! Stop by the information desk to ask about tours, restaurant recommendations and other exciting things to do in our host city.</td>
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**Saturday, 28 October 2017**

**Make the Most of Your LIM Experience with a Relaxed Mind through Meditation**
Brantlee Underhill, Director, Global Chapters, PMI

We know how easy it can be to slip into autopilot when attending a conference – hustling in and out of sessions, responding to emails, tweets and phone calls, maximizing every moment with your volunteering colleagues and hoping that the next break or meal is a tasty – and healthy – one! In the midst of all of this multi-tasking, we may
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find ourselves in mental and physical overload. We want to offer you a few minutes to clear and reboot your mind space. In this 30-minute session, have a seat, close your eyes, hit the pause button, take some deep breaths, and reconnect to your mindful state of being actively aware in each moment for you to make the most of your Leadership Institute Meeting experience.

**Please Note:** This session is optional and seating is limited. Availability is based on a first-come, first-serve basis and attendees will not be permitted to join the session late.

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<th>Time</th>
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<tr>
<td>8:00 am – 7:30 pm</td>
<td>Registration</td>
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<td>8:00 am – 8:30 am</td>
<td>Continental Breakfast/Coffee Service</td>
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<td>8:00 am – 10:00 am</td>
<td>REGION MENTOR/LIMC TRACK</td>
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<td>Mastering the Art of the Tough Conversation</td>
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<td>Facilitators:</td>
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<td>• David Dye, Professional Speaker &amp; Author</td>
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<td>• Karin Hurt, Professional Speaker &amp; Author</td>
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|             | Have you ever regretted not having the tough conversation, as you watched someone you truly care about repeat a pattern you didn’t address? If you knew someone had your best interests at heart, would you want them to tell you the truth? Mastering the art of the tough conversation is a key to success in business and life. One of the greatest gifts you can give another human being is to tell them the truth.
|             | **Please Note:** This session is by invitation only for PMI Region Mentors and graduates of the Leadership Institute Master Class (LIMC). It is not open to LIM attendees. |
| 8:30 am – 9:45 am  | Concurrent Educational Sessions |
| ACADEMIC TRACK | The Top Ten! Chapter Leaders Share Tips for Managing a Successful Social Good Program |
|             | • Fernando Bartelle, PMP, PMIEF Liaison, PMI Rio Grande do Sul Chapter |
|             | • Titilola Park, PMP, PMIEF Liaison, PMI Nigeria Chapter |
|             | • Lacey Strete, PMP, VP of Outreach, PMI Southwest Ohio Chapter |
|             | Moderated by the PMI Educational Foundation, this session will host an engaging panel of chapter leaders sharing tips on their successful programs using project management for social good* in their communities. Panelists will share best practices about identifying partner organizations, selecting resources and impacting chapter members. Session attendees will leave with a top-ten list of tips for creating engaging, sustainable programs that deliver member value and impact the community. |
| ACADEMIC TRACK | Mentoring College Teams and Students through the Enactus Program |
|             | • Kate Duncan, Academic Programs Specialist, PMI |
|             | • Heather Ramsey, Manager, Academic Programs, PMI |
|             | College student Enactus teams plan and execute community outreach projects for social good. Come learn about volunteer opportunities to mentor local college Enactus teams. Be part of informing and influencing. |
| ASSOCIATION GOVERNANCE TRACK | Succession Planning—A Strategic Approach to Developing Chapter Talent |
|             | • Alexandra Wincell, PMP, Past President, PMI Minnesota Chapter |
|             | • Terri Kimball, PMP, Past President, PMI Minnesota Chapter |
|             | This session will share how the PMI Minnesota Chapter identifies future leaders and prepares volunteers for leadership positions through the use of succession planning tools. Attendees at this session will learn how to prevent burnout, eliminate vacancies, improve knowledge transfer and increase the effectiveness of chapter leaders by developing both high-level and individual career paths. |
| MARKETING & COMMUNICATIONS TRACK | Get Social: Effective Social Media Strategies for Chapters |
|             | Andrea Greene, Manager, Retention Marketing, PMI |
|             | Attend this session to learn how to effectively use social media as part of your chapter marketing program. |
| PMI UPDATES, TOOLS AND RESOURCES TRACK | Aligning Chapter Success to PMI’s Strategic Pillars |
|             | • Patricia Garrett, PMI-ACP, PMP, Chapter Member Advisory Group (CMAG) |
|             | • Mike Liddy, Chapter System Support Specialist, PMI |
|             | • Joanne Lynch, Manager, Volunteer Programs & Services, PMI |
|             | • Beth Ouellette, PMI-PBA, PMP, PgMP, Chapter Member Advisory Group (CMAG) |
|             | As part of PMI’s strategic refresh, we introduced a new and evolving focus for the Institute: the strategic pillars. In this session, you will gain a better understanding of the pillars, (strategic focus, customer centricity and |
organizational agility) learn how other chapters are aligning to the pillars, and discover new ways to incorporate the strategic pillars into your chapter planning and operations. This is a highly-interactive session that will result in attendee-generated ideas you can use right away.

Please note: Due to the nature of this workshop, the session is limited to the first 30 attendees but will be offered at four different times on the agenda.

8:30 am – 9:15 am  Chapter Learn & Share Sessions

<table>
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<tr>
<th>ASSOCIATION GOVERNANCE TRACK</th>
<th>Enabling the Next Generation of Volunteer Leaders: A Case Study by the PMI Rochester Chapter</th>
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<tbody>
<tr>
<td>◦ Lori Gacioch, PMP, Marketing VP, PMI Rochester Chapter</td>
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<tr>
<td>◦ Michelle Venezia, PMI-ACP, PMP, President, PMI Rochester Chapter</td>
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Are you doing what it takes to enable our next generation of volunteer leaders? Are the tools and processes in place within your chapter to ensure seamless transitions through the frequent turnover of volunteer leadership teams? Attendees will walk away from this session with a framework for how to begin the process of achieving chapter sustainability through strong transition and succession planning. For each of the identified focal areas, the PMI Rochester Chapter will expand on what specifically the chapter has done to grow in each area. The discussion will start with the strategic vision that was put forward to the board, driving them to work as a team to embrace the need for consistency and process. The presenters will briefly touch on the progression the chapter has taken to reach its current state, and provide examples of artifacts they have produced for other chapter leaders to take away as a starting point.

<table>
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<tr>
<th>MEMBERSHIP TRACK</th>
<th>Member Data Analytics—Insights, Opportunities and Challenges: A Case Study by the PMI Chicagoland Chapter</th>
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<tr>
<td>◦ Gayatri Kalluri, PMP, Director, Member Analysis, PMI Chicagoland Chapter</td>
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<tr>
<td>◦ Jonathan Lee, PMP, President, PMI Chicagoland Chapter and PMI Leadership Institute Master Class (LIMC) Alumni</td>
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This session will share an analytics journey of the PMI Chicagoland Chapter to integrate data from various systems into a consolidated platform to analyze the data for insights and opportunities. Over the years, the chapter has invested in technologies and systems to consolidate member information, improve communication and collaboration among chapter leaders, minimize activities which do not add value and collect member feedback on chapter programs and events. Considerable data related to member preferences, participation and activities is available for analysis. The chapter aspires to define, measure, monitor and work toward achieving SMART (simple, measurable, achievable, relevant and timely) membership goals for the chapter.

<table>
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<tr>
<th>MEMBERSHIP TRACK</th>
<th>Outreach through Effective Segmentation: A Case Study by the PMI Bangalore India Chapter</th>
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<tr>
<td>Basu Dutta, PMP, President, PMI Bangalore India Chapter</td>
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Project managers are the key link between strategy and its effective implementation. Hence, for any strategy to deliver on its promise, it’s of paramount importance that the people driving its execution are well honed in their area of trade. The PMI Bangalore India Chapter has assiduously worked on this aspect not only to provide a holistic development of the practicing project management community, but also to focus on the budding project managers of the future. This session will highlight how the chapter was able to identify specific development needs of project managers—both from the perspective of their individual level of progression in their respective careers and industry specific nuances—and then provide appropriate training, mentoring and knowledge sharing to enhance their capabilities by integrating the relevant components of the PMI Talent Triangle® for their holistic development.

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<tr>
<th>PROFESSIONAL DEVELOPMENT TRACK</th>
<th>Inspiring New Leaders and PMPs—Tapping Novice Professionals: A Case Study by the PMI Vancouver Island Chapter</th>
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<tr>
<td>Amber McMillan, PMP, Certification Director, PMI Vancouver Island Chapter</td>
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The PMI Vancouver Island Chapter recently recognized the need to seek new chapter members and volunteers, hungry for project management knowledge but lacking in experience. Through valuing relationships with novice professionals and offering training opportunities in trade for volunteer hours, the chapter and its leaders were able to inspire new leaders and encourage their pursuits to gain certification and ultimately project management careers. Attend this session to hear how the chapter implemented its education program CEPS (certification examination preparation seminar).

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<tr>
<th>PROFESSIONAL DEVELOPMENT TRACK</th>
<th>Implementing a Project Management Mentoring Process in Your Chapter: A Case Study by the PMI São Paulo, Brazil Chapter</th>
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<tr>
<td>◦ André Ricardi, PMP, Programs Director, PMI São Paulo, Brazil Chapter</td>
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<tr>
<td>◦ Anderson Sales, PMP, Governance Board, PMI São Paulo, Brazil Chapter</td>
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The PMI São Paulo, Brazil Chapter provides expert assistance for project workers (apprentices) through its Project Management Mentoring program, which aims to provide higher levels of proficiency in project management practice to the apprentices. The mentors are industry professionals with extensive experience in project management, and they go through a selection process for verification of their technical skills, management and soft skills. This session will introduce the mentoring program and the process the chapter implements, and will share the benefits the chapter and its members receive from the program.

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<tr>
<th>Time</th>
<th>Activity</th>
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<tr>
<td>9:00 am – 6:30 pm</td>
<td>Exhibit Hall and PMI® Bookstore</td>
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<tr>
<td>9:45 am – 10:15 am</td>
<td>Networking Break</td>
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<tr>
<td>10:30 am – 12:00 pm</td>
<td>General Session and Keynote Speaker: Sir Tim Berners-Lee: “A Look Ahead into the Future of Tech”</td>
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<tr>
<td>12:00 pm – 1:30 pm</td>
<td>Networking Lunch</td>
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For the program schedule for the remainder of Saturday and all PMI® Global Conference sessions, please click here.