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## 2008 PMI Board of Directors

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March 20, 2008

Dear PMI SIG and College Leaders,

I am writing to you, on behalf of the PMI Board of Directors, regarding the Virtual Communities Project. This letter is intended to offer insight into Board strategy related to the concept of community within PMI while shedding light on the strategic direction given to Greg Balestrero and the PMI staff. Additionally, this letter addresses questions raised by a recent memo sent to the board by some of our SIG and College leaders, as well as requests from SIG mentors, and communications from dedicated volunteers on the need for enhanced communications on the Virtual Communities Project rollout.

Every step that Greg and the staff have taken in facilitating the transformation of our community both on the geographic level as well as the virtual community space has either been in response to Board direction or with Board approval. The Board has been and remains very supportive of the work that has been done to investigate ways of improving our member experience in components and the need to continue to elevate our stakeholder engagement activities. We all recognize that one of the most important critical success factors for PMI in the 21<sup>st</sup> century is a vibrant and healthy component community that is able to meet the needs of members while delivering consistent and quality service.

As some of you may know, much of my personal volunteer involvement within PMI has been within the ranks of the SIG leadership. As a founder of a SIG, a former officer in another SIG, and a former Chair of the Assembly of SIG Chairs, I recognize that virtual communities within PMI play a critical role in the creation, gathering, and dissemination of knowledge. Indeed our virtual communities have been the catalyst behind the development of key offerings that serve the membership and allow PMI to take the profession to the next level globally. Having said that, we must also appreciate that the virtual communities within PMI over the past few years have not lived up to their full potential. Issues including high attrition rates and stagnant growth demonstrate the historically faulty approach we've had in modeling our SIGs and Colleges. In fact PMI has not always appreciated the unique benefits that our virtual communities and technology have to offer. As such the SIGs and Colleges had not received the best possible support as they worked to meet the needs of stakeholders. This history however should not be a stumbling block in trying to innovatively work together to implement a new framework that enables virtual communities, regardless of topic, to thrive.

As we step back a bit and look at the chronology of events, the subject of community was first discussed by the Board and Staff as early as 2003, when a group of thought leaders were brought in to brief us on the emerging strategies for community formation. In 2004 the PMI Board of Directors assigned an objective to Greg Balestrero, as CEO, to implement a new community strategy. The initiative was named the Community Transformation Project (CTP). The first phase within CTP was implementing a new model for geographic based components. Its implementation is currently underway with 28 actively forming chapters under development, all required to conform to a new value-based performance framework.

The second phase of CTP, which began in 2007, is the Virtual Communities Project (VCP). VCP is still driven by the same principles of CTP. The focus is to "normalize the value delivered to PMI's individual members through communities." The main intent of normalizing value is the element of stakeholder management, as it is critical that our members receive consistent service across geographies, industries, interests, and knowledge areas.

PMI's strategic plan, in fact, represents a call to action for our PMI community at large (both volunteer leaders and staff) to support our objective of being the "go to place" for project management knowledge and information. Our 3-5 year goal of being the preferred source and resource for knowledge of the profession forces us to think of new and innovative ways to engage members and build knowledge.

Executing a strategy that positions PMI in this way requires significant change in all parts of the organization. Our current approach and model for virtual communities has not changed in over ten years. In that time, PMI and more importantly the world around us has changed significantly. Furthermore, the emergence and convergence of technologies continue to challenge us to provide seamless and easy access to Project Management knowledge.

VCP, however, is much more than creating a new system or a common infrastructure for virtual communities. It is an approach to remove the gates and barriers we have placed before members and other stakeholders allowing them to have unlimited access to information and knowledge. Virtual communities that include barriers to entry while being forced structurally to operate in silos have caused members significant frustration and dissatisfaction. The underlying policies, procedures and processes for content development and acquisition as well as access must change. Alignment within PMI's knowledge strategy is also paramount as we drive to deliver credible, relevant and accessible knowledge. This reality has forced us to examine all current practices within our existing virtual communities.

To that end, in 2007 a team of dedicated volunteers were appointed to work on the VCP project to research and evaluate existing policies, procedures, practices and processes and recommend new models for the future. This work has been the subject of the presentations at the last three Leadership Meetings and many other formal and informal communications.

We understand from several leaders and staff that the direction of VCP is not universally understood or embraced. You have told us that our efforts with respect to communication have not been adequate. We want to reiterate our commitment to this project and also to the leaders within this part of PMI. The past and current paths for communication (representation of SIGs and Colleges in VCP, LIM updates, conference calls, etc.) will continue to be utilized. The Board has also directed Greg and the staff to be available to your entire leadership teams for discussion and understanding. To date, two meetings with SIG/College boards have been conducted, and a third is scheduled.

There has been much misinformation about the project and the models we are using to go forward. There are two active models. Following the Atlanta meeting there was a misunderstanding that there was a third "exception" model that would allow SIGs and Colleges to remain as they are, however this is not the case.

An "exception model" has not been developed, since there is no foundation or focus for an exception. It is the intent to move forward as planned using the two new models. However, it was agreed that if there is a particular problem or challenge along the way that cannot be overcome with the new models, then there may be a "tailoring of the model" granted for the particular issue. However, there is no set list of "exceptions," and clearly it is not designed to allow an existing SIG or College to continue under its existing framework. That framework will not work in the future planned for PMI and its members.

We have received several communications that suggest the PMI Board is neither aware nor supportive of VCP. To the contrary, we support VCP as is evidenced by our assignment of specific objectives to the CEO every year since 2004 to address both the Community Transformation Project and now the Virtual Communities Project. Progress on these objectives is reviewed frequently by the Board, including February of this year in Sydney, Australia. This ensures that PMI work is aligned through the staff organization. Regular updates to the Board of Directors will continue through 2008.

Anecdotally we have heard that VCP is perceived as fixing the small or broken SIGs, and not intended for all existing SIGs and Colleges. On the contrary, this initiative is intended for all existing virtual communities, and is driven by strategy. Always remember that the goal is to deliver better consistent value to members and enhance PMI's position as the "go to place" for project management.

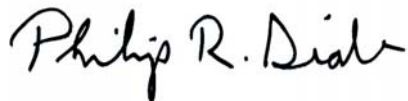
Finally, we understand that one or more leaders have engaged as a group to discuss amongst themselves options that are before you. To understand your options individually is clearly appropriate. However, it is critical that you base your decisions on fact, not hearsay or assumptions. For that reason, it is critical that you engage the staff, led by the CEO, to discuss and understand the real issues at hand.

At the same time we have heard that PMI has not provided enough information for you to understand the changes that are contemplated by VCP or that somehow PMI GOC is not available. Many of the Board members have been copied on the many staff responses to the emails which indicate the contrary. The staff is willing to work with any of the SIG or College Boards, with an openness to communicate and help your team understand the VCP. We encourage you to take advantage of their willingness to work with you.

Also, I want to reinforce the unanimity of the Board on this issue. I assure you that the entire board is supportive of this initiative and again discussed it at its most recent meeting in Sydney, Australia. . We stand united in this important transformation project for PMI. On behalf of the Board, I encourage you to work together on transforming PMI into the “go-to organization” worldwide.

As with any transformational initiative or project, we are working in a multi-year time horizon. We will have more opportunities to engage with each other in the future to both serve our members and continue to make PMI a great organization for the next ten years as we have for the past thirty-nine.

Sincerely,

A handwritten signature in black ink that reads "Philip R. Diab". The signature is written in a cursive style with a large, prominent 'P' and 'D'.

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Philip R. Diab, PMP, MBA  
Chair, 2008 PMI Board of Directors

cc: 2008 PMI Institute Board of Directors; Gregory Balestrero; Mark Langley