

**Performance Management Framework (PMF)
Services Description**

PMI Balance	Level	Service	Measure	Minimum Level	Survey Measure	Description	Branch	Chapter	Chapter with Branches	Virtual M2	Virtual M3	Evidence	ToolKit Reference
s.2.001	Core	None	Retention rate	Geo: 70% Virtual: 65%	Overall member satisfaction	The retention rate is calculated as 1 - (Non-Renewals - Late Renewals) divided by the previous year end (same as current component statistics) - to be reviewed during pilot. The membership satisfaction as measured by overall result from the membership survey conducted by GOC annual.		Yes	Yes	Yes		DEP	
i.1.001	Core	Knowledge Delivery	Number of items	10 per year	Member satisfaction with items	The community provides some or all of the following: articles, white papers, presentations, best practices, research papers, case studies, frequently asked questions (FAQs), glossary of terms and acronyms, processes, procedures, templates, or tools to members via newsletters, web site, journal, e-mail, or presentations.		Extended	Extended	Yes		Newsletter, web site calendar	Professional Development and Education -> Knowledge Delivery
i.1.002	Core	Discussion Topics	Number of topics	10 per year	Member satisfaction with topics	The community provides discussion topics that are moderated, communicated, and timely via web site, conference call, or other means. Where possible the discussions should be linked to the Knowledge Delivery items.		Extended	Extended	Yes	Yes	Newsletter, web site discussion	Communications -> Moderated Discussion Tools
i.2.001	Core	Community Events	Number of Event hours	16 per year	Member satisfaction with events	The community organizes events (networking meeting, PDU sessions, webinars, or conferences, etc.) for the benefit of members (monthly, quarterly, etc.). The duration of the event is the basis for Event Hours, that is each hour of the event counts as an Event Hour. For example a 1 hour webinar is 1 Event Hour. A dinner meeting consisting of 2 hours of networking and a 1 hour PDU presentation is 3 Event Hours. This includes Professional Development Events service and does not change the definition of a PDU. For a Chapter with Branches, the Branch Event Hours are included in the total Chapter with Branches Event hours.	Yes	Yes	Yes			Newsletter, web site calendar	Professional Development and Education -> Professional Development and Education
i.2.002	Core	Professional Development Events	Number of PDU Event hours	8 per year	Member satisfaction with events	The community organizes events (PDU sessions, webinars, conferences, podcasts, conference calls, or video conferences etc.) for the benefit of members. The duration of the event is the basis for Event Hours, that is each hour of the event counts as an Event Hour. For example a 1 hour webinar is 1 Event Hour.				Yes		Newsletter, web site calendar	Professional Development and Education -> Professional Development and Education
c.1.001	Core	Web site	Web site current	Updated monthly	Member satisfaction with web site	Web site or web presence has the following features in either English or the local language: - How to contact the community, both e-mail address and telephone number - Calendar of upcoming events for at least 3 months - Community leadership information - Appropriately branded (e.g. PMI Logo correctly displayed) For a virtual community, the web site contains the following additional features: - Links to related web sites - Volunteer opportunities - Archived artifacts, events, items		Yes	Yes	Yes	Yes	Provide web site link	Communications -> Component Web Site Tools
c.1.002	Core	Communications with Members	Number of communications (via newsletter and / or e-mail)	10 per year	Member satisfaction with communications	A newsletter is mailed or posted on the web site (with an e-mail notice sent to all members) containing: - how to contact the community - list of community Directors and Officers - recognizing new members, members receiving PMI credentials - up coming community events for the next 30 days - what is new - volunteer opportunities		Yes	Yes	Yes	Extended	Newsletter, web site, email	Communications -> Communication with Members (News Briefs/Special Announcements)

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c.1.003	Core	New Members, PMI Credentialed Recognition	Number of communications recognizing New members, PMI credentialed	10 per year	N/A	New members, receiving PMI credentials are recognized by being listed on the web site, in the newsletter, recognized at a member meeting, receiving a welcoming email, or receiving a direct mail welcome package. Note: Privacy Laws may prohibit the publishing names in a newsletter or web site.		Yes	Yes	Yes		Newsletter, web site	Membership -> Membership Recognition
c.1.004	Core	Marketing Introduction and Benefits Package	Package complete	Updated Annually	N/A	An item that is created to describe the benefits of joining the community and made available to members and potential members. The minimum is A4 (8.5 by 11) size flyer, which could be in Tri-fold format.		Yes	Yes	Yes	Yes	Web site, Printed copy, Congress Flyer	Marketing -> Members Benefits Package
c.2.001	Core	Transitioning / Orienting New Community Leaders	Orientation meeting completed Transition plan delivered	1 per year	N/A	A minimum 1 hour training session is held to review the transition checklist with new leaders and orient new leaders to the community and PMI.		Yes	Yes	Yes		Self assessment	Component Management -> New Leader Transition Materials
c.2.002	Core	LIM Attendance	Community Leader Attendance	1 per year	N/A	One representative of the community attends one of the 4 Regional Leadership Institute Meetings to ensure the community leadership is informed and connected into GOC and other PMI Leaders.		Yes	Yes	Yes		Registration	Volunteer Program -> Volunteer Program LIM Attendance
c.3.001	Core	Strategic Planning	Complete Strategic Alignment Worksheet	1 per year	N/A	A strategic planning meeting of at least 4 hours facilitated by a person who is not part of the current board, such as a Community Mentor or Past President. This meeting is separate from the regular Board meeting for the community. The outcome of the meeting is a completed strategic plan, business plan and the PMI GOC Strategic Alignment Worksheet.		Yes	Yes	Yes		Strategic alignment worksheet delivered to GOC	Strategic Planning -> Strategic Planning and Alignment
r.1.001	Core	Branch Support Services	Support services delivered	Monthly	N/A	If the chapter has branches, then the following services are provided: - Chapter web site contains branch events and contact information - communication to members about branch events - maintaining branch finances - registration for branch events or details on how to register		Yes	Yes			Self assessment	Component Management -> Community Development
r.2.001	Core	Scorecard Report	Report completed	1 per year	N/A	An scorecard to members which contains the PMF results for the community.		Yes	Yes	Yes	Yes	Newsletter, web site	Communications -> Scorecard