Performance Management Framework (PMF)
Virtual PMF

PMI Balance Scorecard Objective	Core Service	Measure	M2	M3	Evidence	ToolKit Reference
Stakeholder Intimacy						
Provide knowledge and tools with great service						
Strengthen stakeholder loyalty		Retention rate	65%	NA	DEP	
		Overall member satisfaction	Good	Good		
Demonstrate benefits from project management						
Internal Business Processes						
Thought Leadership: Facilitate innovative thinking and exchange of ideas	Knowledge Delivery	Number of items	10 per year	NA		
		Member satisfaction with items	Good	NA	Newsletter, web site calendar	Professional Development and Education -> Knowledge Delivery
	Discussion Topics	Number of topics	10 per year	10 per year	Newsletter, web site discussion	Communications -> Moderated Discussion Tools
		Member satisfaction with topics	Good	Good		
Profession Enablers: Provide the means to improve the practice of project management	Professional Development Events	Number of PDU Event hours	8 per year	NA	Newsletter, web site calendar	Professional Development and Education -> Professional
		Member satisfaction with events	Good	NA		
Partnering: Develop / enhance mutually advantageous and trusting relationships						
Advocacy: Champion project management maturity and adoption						
Culture and Capabilities						
Make PMI a customer centric organization	Web site	Web site current	Updated monthly	Updated monthly	Provide web site link	Communications -> Component Web Site Tools
		Member satisfaction with web site	Good	Good		
	Communications with Members	Number of communications (via newsletter and / or e-mail)	10 per year	NA	Newsletter, web site, email	Communications -> Communication with Members
		Member satisfaction with communications	Good	NA		
	New Members, PMI Credentialed Recognition	Number of communications recognizing New members, PMI	10 per year	NA	Newsletter, web site	Membership -> Membership Recognition
	Marketing Introduction and Benefits Package	Package complete	Updated Annually	NA	Web site, Printed copy, Congress	Marketing -> Members Benefits Package
Make leadership excellence a strategic competency	Transitioning / Orienting New Community Leaders	Orientation meeting completed Transition plan delivered	1 per year	NA	Self assessment	Component Management -> New Leader Transition
	LIM Attendance	Community Leader Attendance	1 per year	NA	Registration	Volunteer Program -> Volunteer Program LIM Attendance
Make market and business development a strategic competency	Strategic Planning	Complete Strategic Alignment Worksheet	1 per year	NA	Strategic alignment worksheet delivered to GOC	Strategic Planning -> Strategic Planning and Alignment
Resources						
Leverage resources / investments in the marketplace						
Maintain financial viability	Scorecard Report	Report completed	1 per year	1 per year	Newsletter, web site	Communications -> Scorecard

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 statisitics) - 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 of 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)
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

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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			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
i.1.101	Extended	Link to the PMI Knowledge and Wisdom Centre	Link on web site	Updated Annually	N/A	The community web site has a link to the PMI Knowledge and Wisdom Centre in an easy to find location. Along with the link, is a brief description of the Knowledge and Wisdom Centre and the value that members can received from the Centre.		Yes	Yes	Yes	Yes		
i.1.102	Extended	Work with other chapters to address regional issues	Number of issues	1 per year	N/A	The community leadership actively works with the other leaders to address issues that effect the PMI members in the region or country to the benefit of the members in the region or country.		Yes	Yes				
i.1.103	Extended	Community Meeting Roundtable Events	Number of meetings	1 per year	N/A	The community facilitates roundtable events which brings together industry leaders to discuss various project management topics. This can be done in meetings or virtually.		Yes	Yes	Yes			
i.1.104	Extended	Focus groups	Number of groups	1 per year	N/A	The community supports temporary groups to focus on specific topics of interests by providing: - Discussion forum facilities and moderation - File storage and archiving - Promotion of the focus group		Yes	Yes	Yes			
i.1.105	Extended	Best Practices	Number of new or updated items	4 per year	N/A	The community will specifically provide best practices that have been reviewed and agreed to be subject matter experts.		Yes	Yes	Yes			
i.1.106	Extended	Templates	Number of new or updated artifacts	3 per year	Member satisfaction with artifacts	The community provides processes, procedures, tools, or templates to members. The community must own the IP for the artifact and there must be appropriate language governing the use of the artifact.		Yes	Yes	Yes			
i.1.107	Extended	Academic Research	Research spending	$15,000USD	N/A	The community provides funding to support research that has been approved by PMI GOC in Project Management.		Yes	Yes	Yes			
i.1.108	Extended	Knowledge Building Collaboration	Number of new or updated items			The community supports innovative thinking and exchange of items to develop new items or artifacts. This could be done using living meeting, wiki, SharePoint, etc.		Yes	Yes	Yes			

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PMI Balance	Level	Service	Measure	Minimum Level	Survey Measure	Description	Branch	Chapter	Chapter with Branches	Virtual M2	Virtual M3	Evidence	ToolKit Reference
i.2.101	Extended	Multiple webiners, breakfast, lunch or dinner meetings in the same month	Number of meetings	2 per month	Member satisfaction with meetings	The community offers a variety of events, such as webiners, breakfast, lunch, dinner, etc., to chapter members during a month. The events should: - be offered at different times and days of the week to accommodate members schedules. - cover a variety of topics concerning project management, including soft skills - have a variety of speakers, including local industry and project management leaders		Yes	Yes				
i.2.102	Extended	PMI credentials examination preparation course offerings	Number of course offerings	1 per year	N/A	The community offers PMI credentials examination preparation courses. These courses can be offered by community volunteers or through a partnership with local REPs.		Yes	Yes				Professional Development and Education -> PMP Preparation
i.2.103	Extended	Mentoring for members and non-members	Number of participants		N/A	The community offers mentoring where senior project managers mentor new project managers. The mentoring must have a formal kick off meeting which includes an agreement between the mentor and mentee about what is expected.		Yes	Yes				Outreach -> Chapter Mentoring Program
i.2.104	Extended	Project management forum or symposiums	Event agenda	1 every two years	N/A	Organize and hold a 1 or 2 day event that is targeted at business leaders, academic leaders or government leaders.		Yes	Yes	Yes			
i.2.105	Extended	Multiple discussion topics	Number of topics		N/A	Discussion forums are offered to using a variety of tools, such as web, conference call, instant messages, message board, blogs, wiki, rss, etc.		Yes	Yes	Yes	Yes		
i.2.106	Extended	Ask the Expert	Number or responses	10 per year	Member satisfaction	Identify a recognized expert to review, compile, and provide responses to submitted questions.		Yes	Yes	Yes			
i.2.107	Extended	Reviews	Number of reviews	4 per year	N/A	The community publishes reviews of books or tools describing the benefit of the book or tool to members.		Yes	Yes	Yes			
1.2.108	Extended	Networking event	Event hours	1 per year		The community provides an event for the sole purpose of allowing members to get together to meet each other. For example: Golf day, Reception at PMI Congress.		Yes	Yes	Yes			
i.2.109	Extended	Content Information FAQs	Number of new or updated FAQs	10 per year	Member satisfaction with FAQs	The community provides frequently asked questions (FAQs) that address questions of the members concerning the subject of the community.		Extended	Extended	Yes	Yes	Web site	Professional Development and Education -> Content Information FAQs
i.3.101	Extended	Extended calendar	Number of non chapter events in the calendar	10 per year	N/A	Published various networking opportunities in newsletters and on the communities web site. These could include events handle by REPs, other professional organizations, neighbouring chapters, and PMI.		Yes	Yes	Yes			
i.3.102	Extended	Joint, collaborative meetings with other PMI communities	Number of meetings	1 per year	N/A	The community holds events jointly with other PMI communities. This could be a forum, conference, or a dinner meeting. The communities work together in organizing and planning the events and share in the revenue and expenses of the event.		Yes	Yes	Yes			
i.3.103	Extended	Employment opportunities	Number of job postings	Updated monthly	N/A	Announce employment vacancies / opportunities to members via community's events, newsletter, subscribed email groups or its Web site.		Yes	Yes	Yes			
i.3.104	Extended	Supplier relations management	Number of suppliers		N/A	The community has a formal supplier relations processes which includes: - procurement policies - assigned prime for each supplier - require supplier meetings		Yes	Yes	Yes			Outreach -> Partner Program
i.3.105	Extended	Partnerships to provide member benefits	Number of partners	1 per year	N/A	The community has arrangements with provides for benefits to members such as discount for training, auto/home insurance, etc.		Yes	Yes	Yes			
i.3.106	Extended	Resume postings	Number of Resumes	Updated monthly	N/A	The community provides a facility for members to posting their resumes that can be reviewed by potential employers.		Yes	Yes	Yes			
i.4.101	Extended	Project of the Year	Project submitted		N/A	Hold a Project of the Year competition within the community that is aligned to PMI's Project of the Year award.		Yes	Yes				

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i.4.102	Extended	Outreach to Industry Leaders	Number of contacts		N/A	The community has a formal outreach that includes: - targeted industries and why - community specific material to send to organizations - community specific presentation - material to leave with organizations after the meeting		Yes	Yes	Yes			
i.4.103	Extended	Local Executive Events	Number of meetings		N/A	The community has a local Executive Advisory Board or similar group where local executives can meet and discussion project management topics.		Yes	Yes				Outreach -> Executive Advisory Board
i.4.104	Extended	Outreach to university and colleges	Number of contacts	1 per year	N/A	The community has a formal outreach that includes: - targeted universities and colleges - community specific material to send to organizations - community specific presentation - material to leave with organizations after the meeting		Yes	Yes	Yes			
i.4.105	Extended	Participation in Congress events	Number of congress	1 PMI Congress / year	N/A	Community participates in PMI Congresses by one of the following: - Paid sponsorship - Paper endorsement		Yes	Yes	Yes			
c.1.101	Extended	Enhanced Web Site	Web site current	Updated monthly	Member satisfaction with web site	Web site contains the following features: - Members only pages, with login - Discussion groups - Networking opportunities from other organizations - Job opportunities		Yes	Yes	Yes			
c.1.102	Extended	Member directory	Available to members	Updated monthly		The community provides a list of members that can be accessed by members only		Yes	Yes	Yes	Yes		
c.1.103	Extended	Member to Member communications	Available to members	Updated monthly		Providing a means for members to communicate with each other using e-mail, instant messaging, etc.		Yes	Yes	Yes	Yes		
c.1.104	Extended	Multi Language Web Site	Available to members	Same content in all languages	Member satisfaction with web site	The community web site is available in more than one language. The site must contain the same information in each language and be updated at the same time.		Yes	Yes	Yes	Yes		
c.1.105	Extended	Presense at PMI Congress	Booth at PMI Congress	1 PMI Congress / year	N/A	The community has a booth in the PMI Congress Exhibit hall that allow members and potential members meet the community leaders.		Yes	Yes	Yes			
c.2.101	Extended	Mentoring for PMI community leaders	Leadership Development Spending		N/A	The community has a formal process to develop community leaders to acquire the skills and knowledge to be an effective leader that compliments PMI Learn by addressing the local needs for leaders.		Yes	Yes	Yes			Volunteer -> Volunteer Orientation and Training
c.2.102	Extended	Attend Regional Meetings	Leadership Development Spending		N/A	A representative of the community attends the Regional meetings if offered by the Region. The community should be an active participant in the Regional meetings.		Yes	Yes	Yes			
c.2.103	Extended	Community volunteer recognition and awards	Leadership Development Spending		N/A	The community has formal process that at least once a year recognizes the community volunteers.		Yes	Yes	Yes			Volunteer -> Volunteer Recognition
c.2.104	Extended	Member recognition	Number of awards	1 per year	N/A	The community has a formal process to recognize exceptional contributions of members to Project Management in their area		Yes	Yes	Yes			
c.2.105	Extended	Attend PMI LIM Showcase	Presences in Showcase	1 PMI LIM / year	N/A	A representative of the community attends the Regional meetings if offered by the Region. The community should be an active participant in the Regional meetings.		Yes	Yes	Yes			
r.1.101	Extended	Sponsorship Management	Number of sponsors	1 per year	N/A	The community has a formal sponsorship process that has: - the level of sponsorships - clearly outlines the cost of the sponsorship and what is received - who is prime to support the sponsors		Yes	Yes	Yes			Marketing -> Marketing - Misc
r.1.102	Extended	Use of Paid staff to deliver member services	Number of Full Time Equivalent paid staff		N/A	The community has paid staff, either employees, contractors, or sub-contractor, to deliver member services that are best provided during normal business hours (responding to emails, phone calls, registration, web site maintenance, etc.).		Yes	Yes	Yes			

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r.2.101	Extended	Annual Report to Members	Report completed	1 per year	N/A	An annual report to members which contains the following: - Report of component activities - Presentation of component financial results - Key activities planned for the next year - PMF results		Yes	Yes	Yes	Yes		