



# Wideman Education Foundation

*Advancing project management skills*

*"Great oaks from little acorns grow"*

2216 West 21st Avenue, Vancouver, BC, V6L 1J5

## WIDEMAN EDUCATION FOUNDATION

### ANNUAL REPORT

2010

Prepared by Joan Vincent

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**AGENDA**  
**Annual General Meeting, February 16, 2011**  
Elastic Path Software Inc. offices  
1045 Howe Street, 8<sup>th</sup> floor  
Vancouver, B.C.

1. Confirmation of Quorum
2. Approval of Minutes of 2009 Annual General Meeting
3. Presentation of Annual Report for 2010
4. Budget – 2011
5. Nominations and Election of Foundation officers
6. Other business
7. Special thanks
8. Adjourn

**Minutes of 2009 ANNUAL GENERAL MEETING,  
Held March 9th 2010 at BC LDB Head Office, 2625 Rupert Street,  
Vancouver**

**In Attendance:** Joan Vincent, Vice President  
Max Wideman, Secretary  
Li Yang, Treasurer  
Andrew Gemino, Director SFU Liaison  
Jette Helin, Director at Large  
Harbhajan Parhar, Director at Large  
Rob Goatham, Guest

**Apologies:** Vijay Verma, President; Maria Patten, Director Promotion; Tina Chahal, Director at Large. In the absence of Chairman Verma, Joan Vincent took the chair

**Joan welcomed guest:** Rob Goatham

The following **AGM agenda** was approved:

1. Confirmation of Quorum
  2. Approval of Minutes of 2008 Annual General Meeting
  3. Presentation of Annual Report for 2009
  4. Budget - 2010
  5. Nominations and Election of WEF officers
  6. Other business
  7. Adjourn
- 1. A quorum** of WEF Directors was present and the AGM started at 5:40 PM
- 2. AGM Minutes for 2008** approved unanimously.
- 3. Annual Report for 2009** presented by Joan and moved by **Li** that the 2009 Report be received for final comment with thanks to all who contributed. Seconded: **Andrew G. Harbhajan** questioned the strength of the "Introduction to Annual Report" (page 5) suggesting we need more specific goals to point to in our promotion and fund raising. **Andrew G** and **Li** suggested developing bullets from the fifth year of our *Five-Year Plan*. **Rob** undertook to solicit Board members' input and present revised wording from perspective of "a new pair of eyes." **Financial Report for 2009**. **Li** presented her *Financial Report* (previously circulated) as a matter of record.
- 4. Budget – 2010**. **Li** presented her *2010 Budget* (previously circulated) noting that she had prepared a very modest activity budget that could be accommodated within our currently available operating funds. However, **Maria** has recommended a much more aggressive fund-raising campaign to target \$10,000 corresponding to a more active program. In Maria's absence, **Li** proposed that for now, her report and 2010 budget be accepted. Seconded by **Andrew G. Approved** unanimously with thanks to **Li**.
- 5. Nominations and Election of WEF Officers**. **Joan** presented her *Nominating Committee Report*. **Max** proposed that **Rob Goatham** be invited to join the WEF Board. Following discussion and all expressing willingness to stand, the following slate of officers was approved unanimously:

President	Joan Vincent
Past President	Vijay Verma
Vice President	
Secretary	Max Wideman
Treasurer	Li Yang

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Director Promotions	Maria Patten
Director SFU Liaison	Dr. Andrew Gemino
Directors at Large	Tina Chahal
	Ron Goatham
	Jette Helin
	Harbhajan Parhar

**6. Signing Officers.** Li noted that in view of the changes in the Board for 2010, it will be necessary to update our list of signing officers (normally three) with the VanCity Bank. It was agreed that the following shall be WEF's signing officers for 2010:

Joan Vincent  
Max Wideman  
Li Yang

Li also noted that **Max** has been soliciting contributions to WEF in exchange for release of copyright on some of the products on his web site. This has resulted in contributions from foreign countries. Transfer of foreign funds can be greatly facilitated by having an additional account for this purpose, rather than giving out details of our working account. All agreed that this would be a good idea. A visit to the bank by the above three will be arranged in the next couple of weeks to make the necessary changes and arrangements.

**Max** then proposed that, subject to updating the wording on page 5, the *Annual Report* be approved in entirety, including the *Financial Report*, the *2010 Budget*, the *2010 Slate of Officers*, and the *Signing Officers* all be approved. Seconded **Joan**. Approved unanimously.

**7. Other business:** There being no other business for the AGM, the meeting was adjourned at 6:05 PM

## Introduction to Annual Report for 2010

The Wideman Education Foundation ("WEF" 2007) is a registered charity tax-exempt status under the Canadian Federal Government Income Tax Act. WEF offers a win-win opportunity for donors and sponsors with a simple value proposition:

- Project competitions that introduce high school and University students to basic project skills and experience
- Identification of enthusiastic students capable of teamwork and leadership that benefit themselves, their families and communities
- Planting the seeds of a future project-ready workforce for companies in need of project talent

Our motto is:

***"Great oaks from little acorns grow"***

## WEF Vision and 5-Year Goals Summary

To have the governance in place to allow self managed teams to operate a standard model competition through various educational establishments constrained only by funding and volunteers - including volunteers from previous competitions.

- To build a solid foundation of core processes and volunteers on sub committees to enable this

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- To increase the number of University/School Board partnerships from the current one (SFU/Surrey School Board) to three.
- To move from random solicitation of donations to include a committed group of donors
- To move to an independent, fully maintained web site

### **Members of the WEF Board as at December 31<sup>st</sup>, 2010**

1. Vijay K. Verma, P.Eng. PMP – Past President
2. Joan Vincent – President
3. R. Max Wideman, P.Eng., FPMP – Secretary
4. Li Yang – Treasurer
5. Schona Rae – Director, Fundraising
6. Dr. Andrew Gemino – Director, SFU liaison
7. Jette Helin, Director at Large – Website Administration
8. Rob Goatham, Director at Large
9. Heidi Nucklaus, Director at Large
10. Jamal Moustafaev, Director at Large
11. Tina Chahal, Director at Large

### **Message from Joan Vincent, President**

Being President of the WEF Board has been not only challenging but also enormously satisfying. We are evolving in ways both consistent with our original Mandate but also expanding and amplifying the value of PM education.

Our Board represents a wide variety of on- the- ground project management skills and experience, which we believe are of direct benefit to students involved in our activities. I feel that this is an exciting time for advances in project management education and we're privileged to play an important role in that advancement.

We particularly want to thank Dr. Andrew Gemino, Andrew Drinkwater, and Jennifer Beal from the Faculty of Business Administration, SFU Surrey Campus for their involvement and professionalism. We look forward to continuing our relationship with SFU as well as exploring new initiatives with other institutions. We also want to thank the West Coast Chapter of PMI for their continuing enthusiasm and support. I also want to add a personal word of appreciation to all the members of the WEF Board for their dedication and hard work.

### **Message from WEF Founder/Secretary Max Wideman**

From the perspective of fulfilling WEF's goals, the year has been relatively quiet through circumstances beyond our control. Unlike the past two years, the advent of the Winter Olympic Games here in Vancouver substantially disrupted the spring terms of local schools many of which took part in helping to organize associated Olympic activities. For this reason, we were unable to conduct a high school project competition as we have done in previous years. While disappointing, this was to be expected.

However, we were able to put on a successful half-day event. This was entitled "Project Management Career Speaker Event" featuring Rich Brodowski as our keynote speaker. As Project Executive and Director, Olympic Program Management Office for Bell Canada, Rich was tasked with providing governance to Bell Canada's telecommunications for all of the Vancouver 2010 Winter Olympics. As well as having to be failure-free, communication was a critical and

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highly complex component of the Olympic activities. Rich described the challenges in fascinating detail and provided to the assembled students a good example of the sort of challenge and excitement that project management offers.

Over the year, 2010 has seen a number of departures from the 2009 WEF Board but, under the able stewardship of our President, Joan Vincent, the Board has been immeasurably strengthened by those who have since joined. Due to the aforementioned Olympics, no Board meeting was held in January. At the February Board meeting Tina Chahal and Jette Helin were welcomed to the Board. As previously reported, the 2009 Annual General Meeting was held in March and at that time, Drina Allen stepped down to follow her husband on an overseas assignment. We look forward to seeing her again when they return. At the same time, Rob Goatham joined the Board bringing new ideas as to how WEF can expand its competition activities at the undergraduate level. Jette Helin also joined and undertook to investigate launching an independent WEF web site.

In May, Harbhajan Parhar, Maria Patten and Piotr Mazur all experienced changed working conditions and felt they could no longer contribute to the WEF Board's activities. The Board thanked them all for their hard work and accepted their resignations with regret. There was no Board meeting in June. Due to Maria's departure, the Board was no longer able to meet at the LDB Head Offices and subsequent meetings were moved to Max Wideman's home.

In August, Schona Rae joined the Board and turned her attention to the important task of fund raising. In September, the Board gave approval to a major new initiative to launch an undergraduate competition entitled "Sustainable Living Practices". With the help of Heidi Nucklus, this competition will be conducted through SFU's existing undergraduate Business faculty programs that include project management, starting immediately. In October, Jette Helin announced that the new WEF web site is up and running at <http://www.widemaneducationfoundation.org/>. In November, Heidi Nucklus and Jamal Moustafaev joined the Board adding to the Board's collective experience. In December, Tina Chahal found that work and distance to the Board's latest meeting location made it difficult for her to participate and her resignation was accepted with regret.

There have been many changes during the year, no doubt in part due to the current turbulent economic times. Nevertheless, all Board members have worked hard and enthusiastically towards a productive year in 2011.

**Financial Report from Li Yang, Treasurer**

**Wideman Education Foundation Income Statement  
as of December 31, 2010**

**Revenue**

Donations	\$3,569.69
Membership Fees	70.00
Interest from investments	1,032.35
<b>Total Revenue</b>	<b>\$4,672.04</b>

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**Expenses**

WEF website registration & annual hosting	250.82
Annual report filing	25.00
<b>Total</b>	<b>\$275.82</b>

**Liabilities**

2011 SFU Competition Finalist Prize	375.00
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<b>Total Expenses</b>	<b>650.82</b>
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Operating Fund Balance Beginning	3,255.57
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<b>Operating Fund Balance Ending</b>	<b>7,276.79</b>
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**Membership Account**

Membership account opening	52.72
Membership Dividend	2.11

<b>Membership account closing</b>	<b>54.83</b>
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**Wideman Education Foundation Balance Sheet  
As of December 31, 2010**

**Assets:**

**Operating Account**

Cash	7,508.76
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**Investments**

Term Deposit 12 month - Cashable 30 day lock-out	1,500.00
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Term Deposit 12 month - Cashable 30 day lock-out	1,500.00
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Term Deposit 12 month - Non-Redeemable	50,000.00
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**Other Assets**

Membership share at VanCity	54.83
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<b>Total Assets</b>	<b>\$60,563.59</b>
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**Liabilities:**

<b>Accounts Payable</b>	375.00
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**Accrued Liabilities (Settlement of 2009 Outstanding Liabilities)**

2009 SFU Speaker Event	(143.03)
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<b>Total Liabilities</b>	<b>\$231.97</b>
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<b>Restricted Fund</b>	53,054.83
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<b>Operating Fund Surplus</b>	7,276.79
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<b>Total</b>	<b>\$60,563.59</b>
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**Budget 2011**

**Li Yang, Treasurer**

**Policy:** The total budget for the annual expenses is not to exceed the total income from fund raising and investments.

	2008		2009		2010		2011
<b>Revenue</b>	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Fund raising and investments				\$3,888.90	\$5,000	\$4,602.04	\$5,000.00
<b>Total</b>				<b>\$3,888.90</b>	<b>\$5,000</b>	<b>\$4,602.04</b>	<b>\$5,000.00</b>
<b>Student Competition</b>							
Project presentation							
Room rental	\$ -		\$ -				
Equipment rental	\$ -						
Stationery		\$117.86	\$50.00	\$ 67.11	\$ 80.00		\$ 100.00
Cash Award*	\$1,500.00	\$900.00	\$1,500.00	\$ 1,500.00	\$1,500.00		\$2,500.00
Award Plaques**	\$150.00	\$33.60	\$40.00	\$ 39.20	\$ 50.00		
PMI chapter dinner presentation ***	\$ 200.00	\$ -	\$200.00	\$ -	\$ -		\$ 200.00
Gift for Project Manager	\$ -	\$100.00	\$100.00		\$ 100.00		\$ 100.00
PM Memory Jogger****	\$ -	\$ -	\$500.00	\$ 100.93	\$ 600.00		
Finalist book voucher*****							\$1,500.00
Contingency	\$50.00		\$110.00		\$ 100.00		\$ 200.00
<b>Total Student Competition</b>	<b>\$1,900.00</b>	<b>\$1,151.46</b>	<b>\$2,500.00</b>	<b>\$ 1,707.24</b>	<b>\$2,430.00</b>	<b>\$0.00</b>	<b>\$4,600.00</b>
<b>WEF SFU Speaker Event</b>							
Catering & refreshment			\$ 150.00	\$ 143.03	\$ 200.00	\$0.00	\$ 200.00
Annual report filing				\$ 25.00	\$ 25.00	\$ 25.00	\$ 25.00
WEF Brochure				\$ 892.50	\$ -		
Misc. for postage etc.				\$ 24.18	\$ 50.00		\$ 50.00
Fund raising books				\$ 46.20	\$ -		
WEF banner							\$ 300.00
WEF domain registration & web hosting					\$ 100.00	250.82	\$ 150.00
<b>Total</b>				<b>\$2,838.15</b>	<b>\$2,805.00</b>	<b>\$275.82</b>	<b>\$5,325.00</b>

**Notes to Budget 2011:**

- \* For 2008 & 2009, each team has up to 5 members, \$300 for each member. For 2011, each team has up to 5 members, \$500 for each member.
- \*\* For 2008 & 2009, one plaque for the team/school. Certificate for each member. A letter and a certificate for the "project manager". For 2011, plaque for school is no longer relevant as the competition is only for SFU undergraduate students
- \*\*\* Chapter may sponsor the dinner for the students. To cover all members of the winning team and one staff at their school.
- \*\*\*\* \$10/each, 50 students, plus \$50 shipping
- \*\*\*\*\* For 2011, each finalist will be given \$25 book voucher for a total of 12 teams and up to 5 members in each team.

**2010 DONOR LIST**

Mr. Anmar Mango	Method Technologies
Ms. Katie Gove	Telus
Mr. Gary Murphy	Society of PM Professionals of Greater Vancouver
Mr. Vijay Verma	Personal

**REPORTS:****Schona Rae, Director Fundraising**

After taking over this responsibility mid-year we were able to contact several potential supporters and collect a number of small gifts as prizes for future WEF events. Fundraising was completed for the case competition through a donation from TELUS and in addition we were pleased to receive financial support from the Association of Project Management Professionals as well as individual donations.

**Jette Helin, Director Website Administration**

The Board of Directors decided in 2010 to create a new website which would better reflect the mission and scope of the foundation. The existing WEF website, while satisfactory, was located under the Canadian West Coast Chapter of PMI's website and it was felt that a stand-alone website would better meet the requirements of the WEF Foundation. To that end, Jette Helin, one of the WEF Board of Directors, took on the role of webmaster and of overseeing the development of the new website.

Working with two students from SFU, Johnson Wong and Andrew Kumar, the WEF board approved the updated design and the new site was created and implemented in the fall. As part of the new site, a new domain name was secured: [www.widemaneducationfoundation.org](http://www.widemaneducationfoundation.org). The new website contains information about the Foundation, the Board of Directors, current and upcoming events, provides a method for site visitors to contact WEF and also has a secure area for WEF board members. It is anticipated that further improvements and additions will be made to the website in 2011.

**Joan Vincent - Project Management Career Speaker Event**

On December 7, WEF, partnering with the Faculty of Business Administration and the School of Interactive Arts and Technology (SIAT) at Simon Fraser University, held their second successful Project Management Career Speaker Event. Keeping in mind the importance of being on the cutting edge of technology and awareness of global workworld changes, WEF continues to fulfill its Mandate to teach and develop tomorrow's Project Managers.

Jan Kietzmann welcomed everyone to SFU and presented a thumbnail sketch of the work and plans of SFU. We then proceeded with the event programme.



Winning Team – 2010 Career Speaker Event held at SFU

**CHRISTOPHER ROBIN PROJECT: (Max Wideman and Jan Kietzmann))**

Incorporating fun, teamwork, risk management, problem solving and communication, high school and SFU students enthusiastically applied their skills to determine the safety and well being of an at-risk project team – Code name: Pooh

Requirements were:

1. Describe the situation
2. Determine objectives or limitations
3. Generate multiple solutions
4. Select best alternatives
5. Explain rationale
6. Present findings

Assessment and interpretation of the requirements by the student teams resulted in innovative, creative and entertaining presentations. The students grasped the concepts quickly and enjoyed the process. Winning teams received a small prize.

**SFU AND SIFE STUDENT PROJECT REPORTS:**

SFU Business, SIAT and SIFE students spoke about their projects and lessons learned – so far. The depth, scope and implementation of the project work were impressive.

**PROJECT MANAGEMENT AS A CAREER: (Joan Vincent)**

An overview was given focusing on Project Management as a Career– tips, trends, best case/worst case scenarios, skills required, personality types and the diverse industries that hire Project Managers.

**KEYNOTE SPEAKER: RICH BRODOWSKI, BELL CANADA**

Our Keynote Speaker, Rich Brodowski, Director, Olympic Program Management Office, Bell Canada, gave an insightful and enthusiastic presentation on behalf of the 2010 Winter Olympics. Rich was tasked with providing governance to Bell Canada's Olympic Program that provided ALL the telecommunication needs for the Olympics. This included all voice and data services, systems cabling, logistics, business office functions and support to staff. The expectation was to ensure flawless delivery – an expectation that was met. Rich gave the students some appreciation for how that was achieved – risk, time, communications, personalities, multi-level skill sets required – and more. Some comments from the students were, "That was great! I learned a lot", "Thanks, I'm glad I came today", "I'm in the middle of studying for exams and almost didn't come over here today, wow, I'm glad I did".

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**EVENT PLANNING TEAM:**

Joan Vincent, Project Manager (President WEF)  
 Max Wideman, author Christopher Robin Project (Founder, Secretary WEF)  
 Schona Rae, Photographer (WEF)  
 Rob Goatham (WEF)  
 Jan Kietzmann (SFU)  
 Jennifer Beale (SFU)  
 Andrew Drinkwater (SFU)  
 Andrew Gemino (SFU)  
 Venue, prizes and Refreshments were generously provided by SFU

**Nominations for WEF Board 2011**

<b>Position</b>	<b>Name</b>
President	Joan Vincent
Past President	Vijay Verma (ex-officio)
Vice President	Li Yang
Secretary	Max Wideman
Treasurer	Jamal Moustafaev
Director Fundraising	Schona Rae
Director SFU Liaison	Dr. Andrew Gemino
Directors at Large	Jette Helin
	Rob Goatham
	HeidiNucklaus
	David Sussman

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**Future Plans – Rob Goatham, Project Manager, Wideman Prize Competition**

We intend to continue the development of WEF and its mission. 2010 saw the launch of the “Wideman Prize for Project Management Excellence. The Wideman Prize is an annual prize offered to students participating in WEF approved under-graduate Project Management classes. The Wideman Prize is designed to use competition as a tool for raising the bar on educational standards and as a platform for attracting a broader range of students into Project Management classes. For the 2010-11 competition WEF will again be partnering with Simon Fraser University. The finals of the 2010-11 competition will be held on 14<sup>th</sup> May 2011 at the SFU Surrey Campus. WEF will be looking at options for expanding the competition to other schools for the 2011-2012 year.

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7/30/09

**WEF 5-year long-range plan****Executive Summary**

Grow the WEF organization and its activities through developing a volunteer committee structure to handle the workload of creating "Future Winners through Education"

**Background Opportunity**

In 1991 long-time PMI member Max Wideman wrote a book, published by PMI®, and very kindly donated the net proceeds to the West Coast Chapter. In 2004, PMI HQ ceased selling the book, and the Chapter received further royalties from PMI in the amount of CAD \$51,000. At a General Meeting of the Chapter's members held on November 23, 2004, it was proposed and approved that the Chapter should establish an independent education foundation to which this money should be assigned as seed money. The foundation later became known as the Wideman Education Foundation, "WEF".

**Vision**

To have the governance in place to allow self managed teams to operate a standard model competition through various educational establishments constrained only by funding and volunteers - including volunteers from previous competitions.

**Mission (The Foundation's charitable purpose)**

To educate students and practitioners on the theory and practice of project management principles and skills through workshops and educational competitions.

**Goals**

*To teach and promote project management education to foster future winners by raising funding and support through partnering with industry, educational institutions and the business community.*

The essential practical skills include preparation, planning, teamwork to get it done, communication, presenting and so on. We believe we can foster these skills, and a better understanding of projects, by working for mutual benefit with those involved in education, training or project management.

**Long Term Objectives**

Our long-term objectives include:

- Clarify our Operating Values (ideals that the organization aspires to hold itself accountable for (i.e. caring attitude, respectfulness, responsiveness, diversity, integrity and accountability, best practices, partnerships financial sustainability).
- Identify our underlying assumptions (i.e. all people (students have equal rights, strengths and assets, we can make a difference in the lives of students, project management knowledge is of value, students thrive)
- Increase volunteers and sub committees of the Board of Directors
- Research and contact 3 possible partnering schools (in addition to SFU Surrey)
- Implement an Environmental Scan using SWOT

Strengths: Internal characteristics, qualities and Capabilities that are doing well

Weaknesses: Internal qualities that need to be improved

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Opportunities: External activities that the Organization may benefit from, connect with or take advantage of to grow

Threats: External activities that threaten the current and future success of WEF

- Develop a “succession plan”
- Work on a “communications plan”
- Continue to work and strengthen relationships within the project management community (presentations, conferences, education)
- Monitor this strategic plan regularly
- Develop a rolling fundraising initiative
- Continue with current competition
- Work on the structure of the Foundation
- Execute a Pilot of process, documentation, training program with a new competition (possibly Capilano College based) with a new team & educational group with original team acting as ‘Pilot Parents’ – provide training and mentoring and observing process
- Consider adding a remote region through a similar Pilot process. This will be more difficult, require putting a local management group in place and probably need funds for travel.

### Marketing

Once the vision is in place move ahead with fundraising, do some initial research and establish a sub committee to provide more marketing expertise, marketing strategy, extending collateral, and building a marketing/fundraising plan to include:

- Define key stakeholders (who will give us money and who will align or partner with us ...and are there limitations on who we want to attract) and target audiences (why they will give us money and align with us)
- Establish fundamental principles related to the ethics and type of partners and sponsors we will target e.g. will we solicit sponsorship from small companies with say one PM type product that we don't necessarily see as beneficial to our target audience?
- Marketing & communication plan for next competition
- Target sponsorship for next competition – i.e. collect enough sponsors to cover all prize money and other donations & grants to cover operating costs.
- Target other donors and \$\$\$
- Longer term marketing strategy

### Competition

- Review and clarify goals, objectives etc.
- Develop training program for new teams
- Prepare for (very thoroughly) and (not getting involved in the management or execution)
- Review results and update processes, documentation and training
- Review improvements with teams
- Repeat in the unlikely event this is not successful. It is at this stage we need to ensure we have put strong effort to build a solid foundation – built for growth
- We should now have a package that can be replicated and growth can be at a rate with which we are comfortable. I would suggest for the first few years we cannot add more than one competition per year.
- Continue to monitor and improve.

### Committees/Composition/Objectives/Tasks

1. **Board** (President, Vice President, Secretary, Treasurer, & Chairs, total eleven)

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- Objective:** Executive direction & leadership
- a. Direct and review committee efforts
  - b. Budget for expenses and recognition
  - c. Organize board meetings
- 2. Fundraising** (Chair, PM Liaison, Public Relation Officer)
- Objectives:** Fundraising & Marketing
- a. Marketing to project managers and consultants
  - b. Long-term marketing to public companies
  - c. Short-term marketing to private companies
  - d. Liaise with Recognition committee for donors
- 3. Treasurer** (Chair, Secretary, Membership)
- Objectives:** Administration & Membership
- a. Accounting
  - b. Finances
  - c. Maintain Membership dues and list
  - d. Organize executive meetings
  - e. Coordinate committee meetings and reports
  - f. Preparation and distribution of Minutes
- 4. Volunteers** (Chair, Volunteer Coordinator, Recruitment Coordinator)
- Objectives:** Volunteer recruitment
- a. Review and maintain committee responsibilities
  - b. Marketing for volunteers through PMI, educational institutions and businesses
  - c. Liaise with Recognition committee for volunteers
  - d. Coordinate volunteers on committees
- 5. Recognition** (Chair, Award Presenter, Award Coordinator)
- Objectives:** Donors & Awards administration
- a. Review awards and gifts for winners, participants, donors and volunteers
  - b. Prepare and present certificates, letters, awards and gifts
  - c. Supply promotion material for fundraising, team recruitment and volunteer recruitment
- 6. Events** (Chair, Team Recruiter, Workshop Presenters, Events Organizers)
- Objectives:** Organize Events – competitions and other
- a. Prepare contest project assignment document
  - b. Recruit and coordinate judges
  - c. Recruit and coordinate workshop presenters
  - d. Liaise with Recognition committee for teams
  - e. Prepare and conduct presentation to schools to recruit contest teams
  - f. Register and communicate with contest teams
- 7. Partnerships** (Chair, Education Coordinator, Community Coordinator)
- a. Market to educational institutions
  - b. Coordinate tasks and resources with education institutions
  - c. Liaise with community and business associations for sharing educational and marketing objectives



# Wideman Education Foundation

## Advancing project management skills

"Great oaks from little acorns grow"

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Charity #82459 4121 RR0001

### WEF Five-Year Plan

Ref. #	Components	WEF Now 7/7/09	2010	2011	2012	2013	WEF in 2014
<b>Organization</b>							
Org. 1	Charitable Purpose (per Constitution)	To educate students and practitioners on the theory and practice of project management principles and skills through workshops and educational competitions	No change	No change	No change	No change	No change
Org. 2	Areas of active operation	1 (Surrey)	1	2	2	3	3 districts
Org. 3	Board members	9 (11 allowed)	9	11	11	11	Full Board of 11
Org. 4	Sub Committees of Board	None	1, namely: • Fund raising	2, namely: • Fund raising • Membership	3, namely: • Fund raising • Membership • Communications	4, namely: • Fund raising • Membership • Communications • Technical (judging)	5, namely: • Fund raising • Membership • Communications • Technical (judging, etc.) • (Other)
Org. 5	Members	None (other than Board)	20	40	60	80	(Say) 100
Org. 6	Partnerships	1 (SFU-Surrey)	1 Partnership	2 Partnerships	2 Partnerships	3 Partnerships	3 Partnerships
<b>Operations</b>							
Op. 1	Project competitions	1 per year	1 per year Initiate 2 <sup>nd</sup> partner	2 per year	2 per year Initiate 3 <sup>rd</sup> partner	3 per year	3 per year
Op. 2	Delivery models	1 - i.e. SFU model based on documentation and a core of people involved since beginning	1	2	2	3	1 + 2 others unspecified
	Other events	None	Plan community partners	Initiate building community partnerships	Community partner events	Community partner events	Community partner events
Op. 3	PMI Chapter liaison	CWCC Chapter liaison	(Liaison continued)	(Liaison continued)	(Liaison continued)	(Liaison continued)	(Liaison continued)
Op. 4	WEF website	Hosted by CWCC	Hosted by CWCC	Independent	Independent	Independent	Independent
Op. 5	WEF News Letter	None	None	None	Annual	Bi-annual	Bi-annual

<b>Finances</b>							
F1	Student Awards	\$300/person up to 5 = \$1,500	\$300/person up to 5 = \$1,500	\$300/person up to 10 = \$3,000	\$500/person up to 10 = \$5,000	\$500/person up to 15 = \$7,500	\$500/person up to 15 = \$7,500
F2	Expenses: Fund Raising	\$500 pa (average)	\$1,000	\$1,500	\$2,000	\$2,500	\$2,500
F3	Annual Budget	\$2,000	\$2,500	\$4,000	\$6,000	\$8,000	\$10,000
F4	Revenue: Donor base	Random solicitations	Build a short-term donor base	Build a short-term donor base	Build a long-term donor base	Maintain long-term donor base	Maintain long-term donor base
F4	Revenue: Fund Raising & Interest	\$2,000	\$2,500	\$4,000	\$6,000	\$8,000	\$10,000
F5	Donor Benefits	Limited recognition	Recognition, to be developed	Recognition, to be developed	Well developed recognition	A well developed schedule	A well developed schedule
F6	Membership fees	Annual - \$10	Annual - \$10	Annual - \$10	Annual - \$15	Annual - \$15	Annual - \$15
F7	Capital	\$53,000	\$54,000	\$56,000	\$57,000	\$59,000	\$60,000 (approx. 3% pa)

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