



Fort Worth Chapter of the Project Management Institute Annual Membership Business Meeting

July 20, 2023

Kathy Harvel, President,
FWPMI



MISSION

The Fort Worth Chapter of PMI uses a friendly and individualized approach to promote the growth of the project management profession and best practices through high-quality educational events and networking opportunities in the communities we serve.

VISION

The Fort Worth Chapter of PMI will be recognized as a vital and innovative leader in project management practices and a respected community contributor by promoting awareness, effectiveness, and value to local practitioners and organizations.

2023 BOARD OFFICERS



Kathy Harvel
MPA, PMP, PMI-ACP, CSM
President



Rahila Vayani
MBA, PMP, CSM
**Past
President**



Zach Valigura
MBA, PMP
**VP,
Operations**



Dionne Beer
MS, PMP, CSM
**VP, Professional
Development**



Samantha Fox
MS, PMP
**VP, Internal
Relations**



Sadu Shetty
DBA/PhD, PMP
**VP, External
Relations**



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NEW BOARD OFFICERS ELECTED FOR 2024 - 2025 TERM



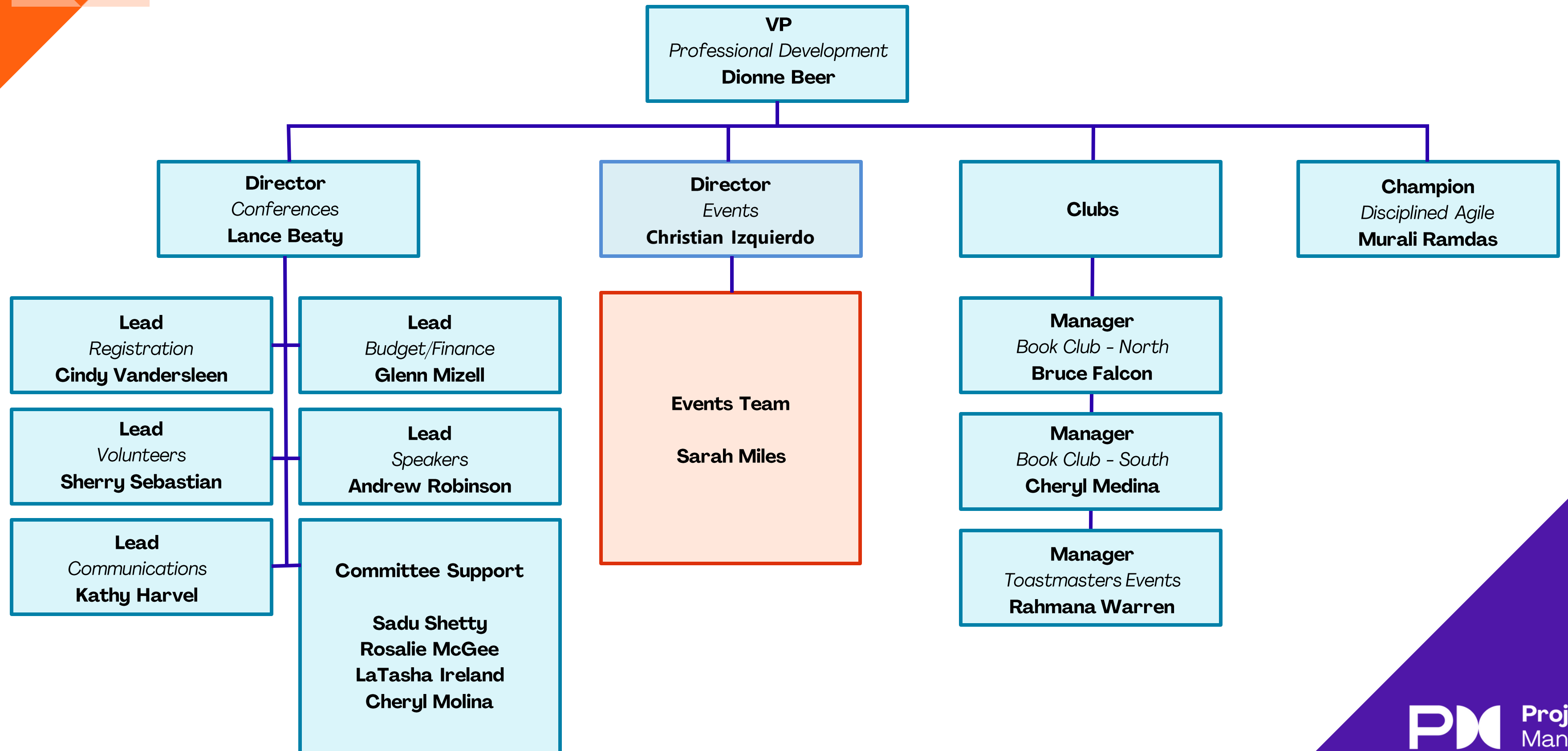
Kim Collins
PMP
VP, Operations



Sadu Shetty
DBA/PhD, PMP
VP, External
Relations

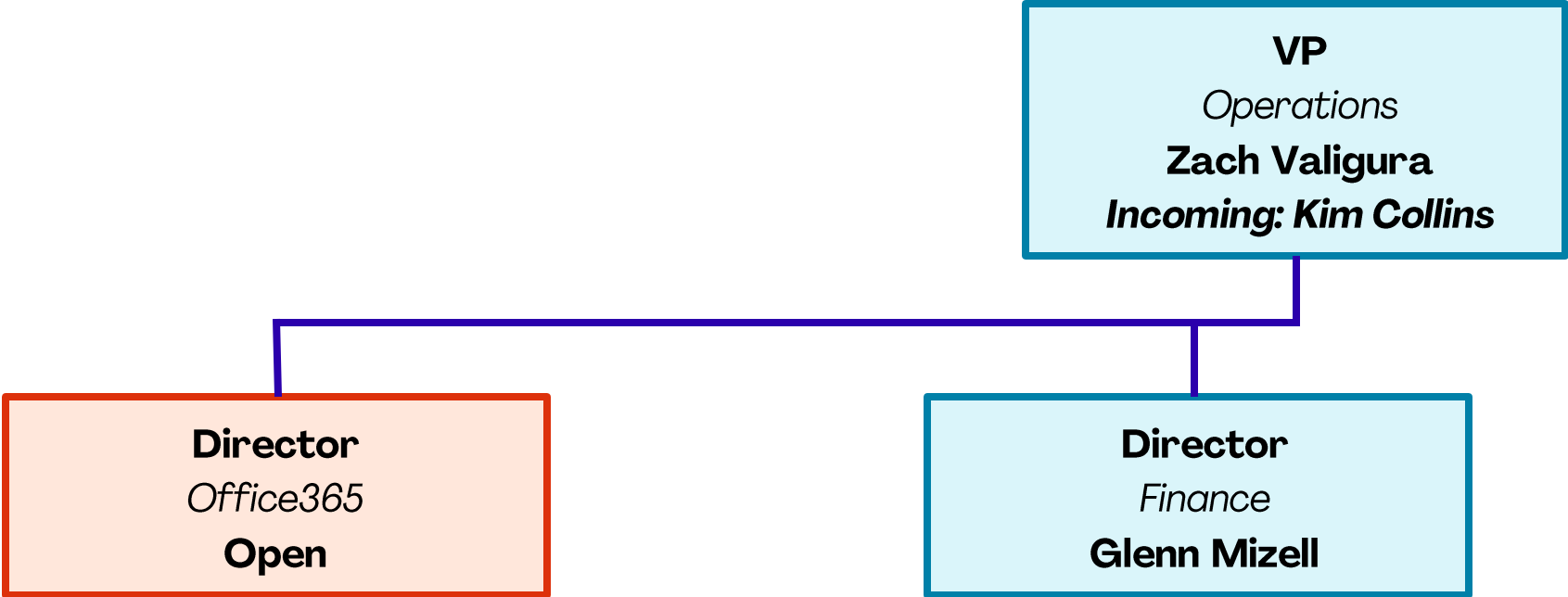
PMI - Fort Worth Chapter

Professional Development Team



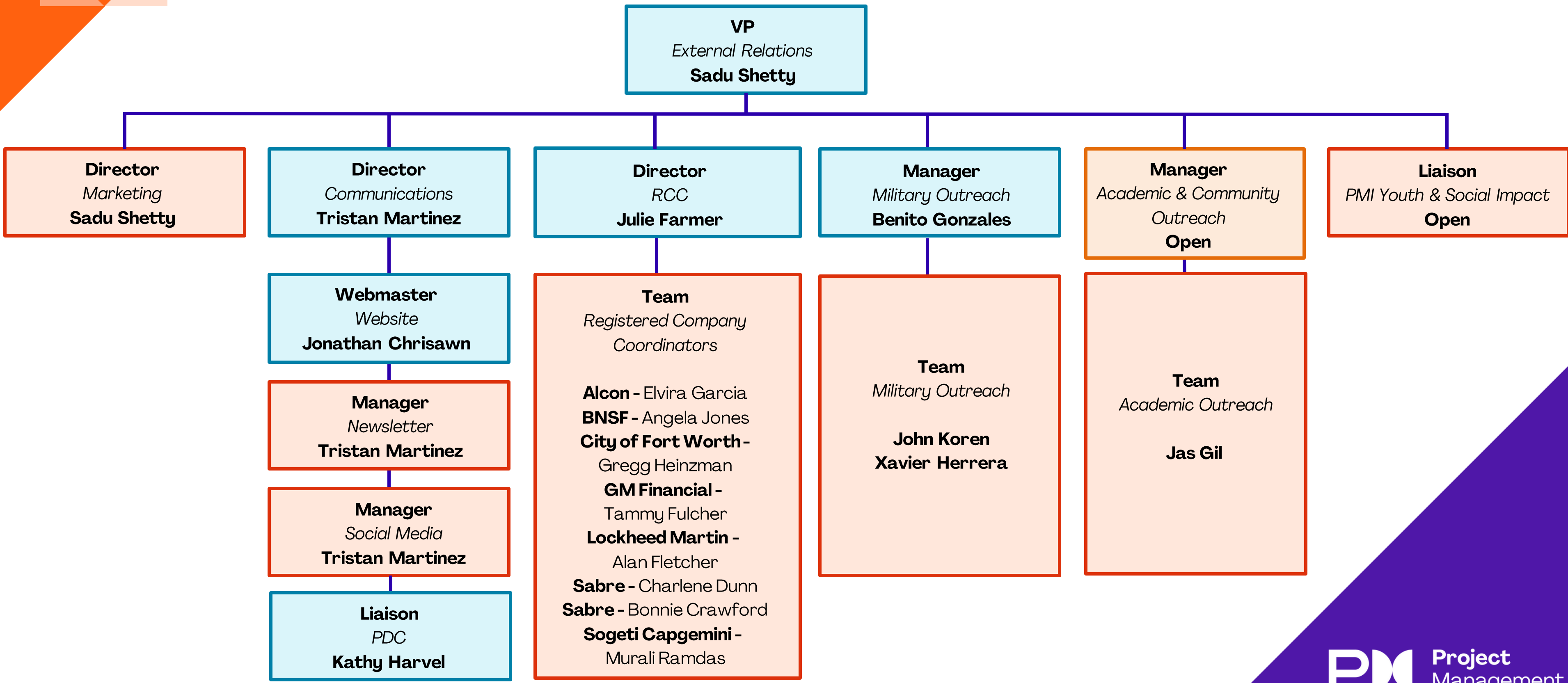
PMI - Fort Worth Chapter

Operations Team



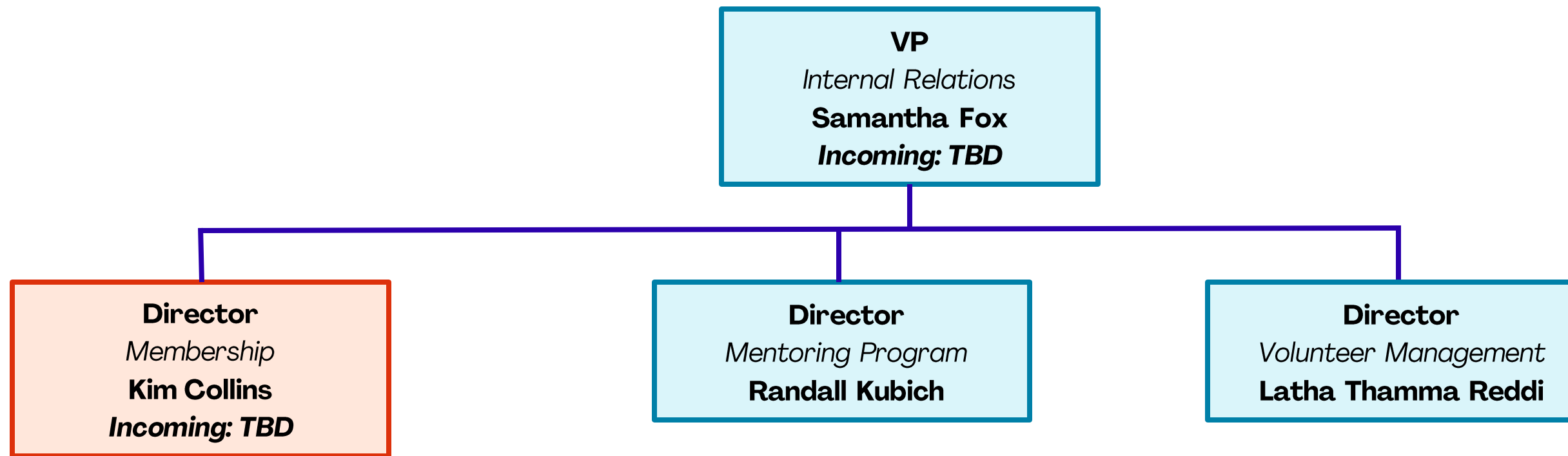
PMI - Fort Worth Chapter

External Relations Team



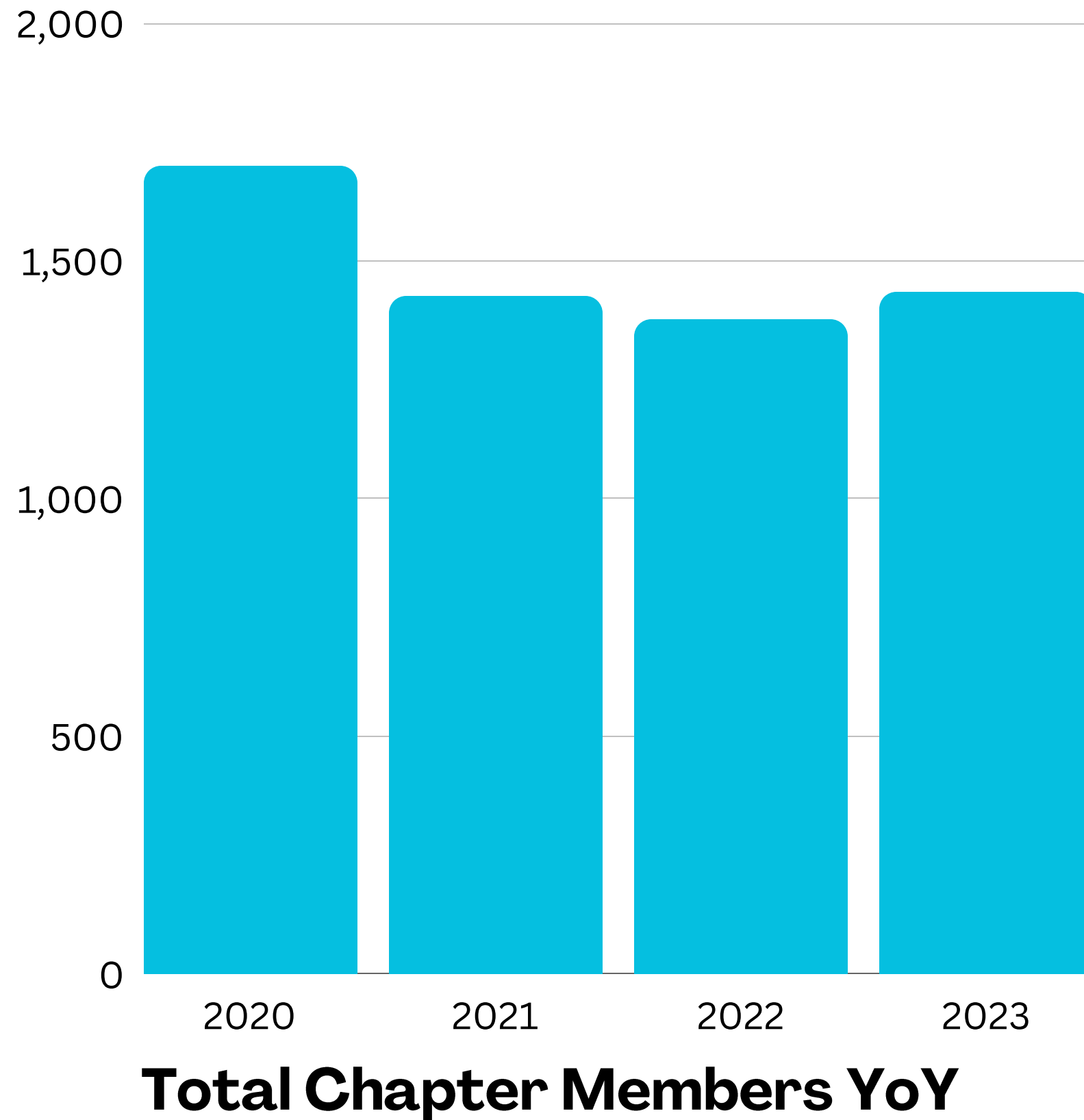
PMI - Fort Worth Chapter

Internal Relations Team



PMI - Fort Worth Chapter

Key Metrics -



1435

Total Active
Chapter Members

191

New Members, 2023

30

Current Student
Members



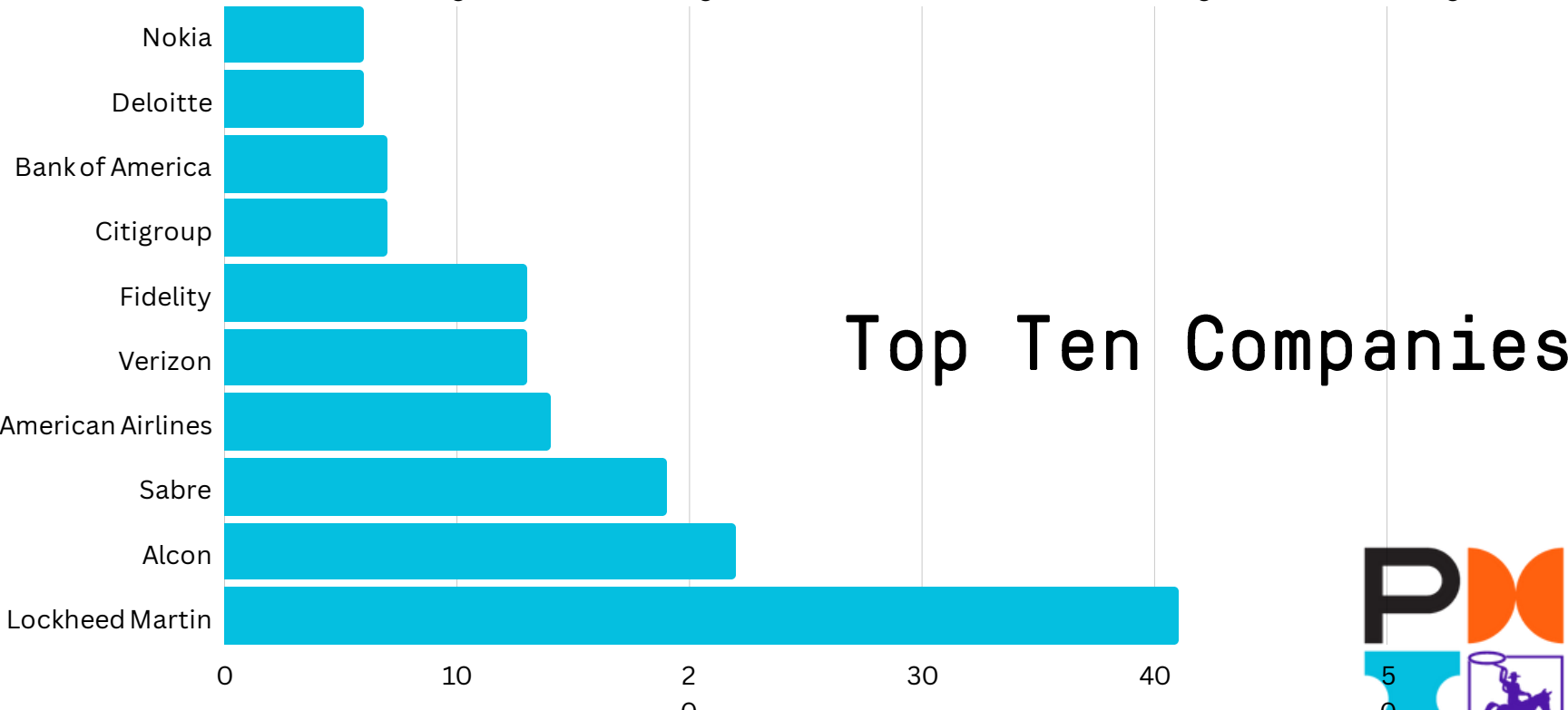
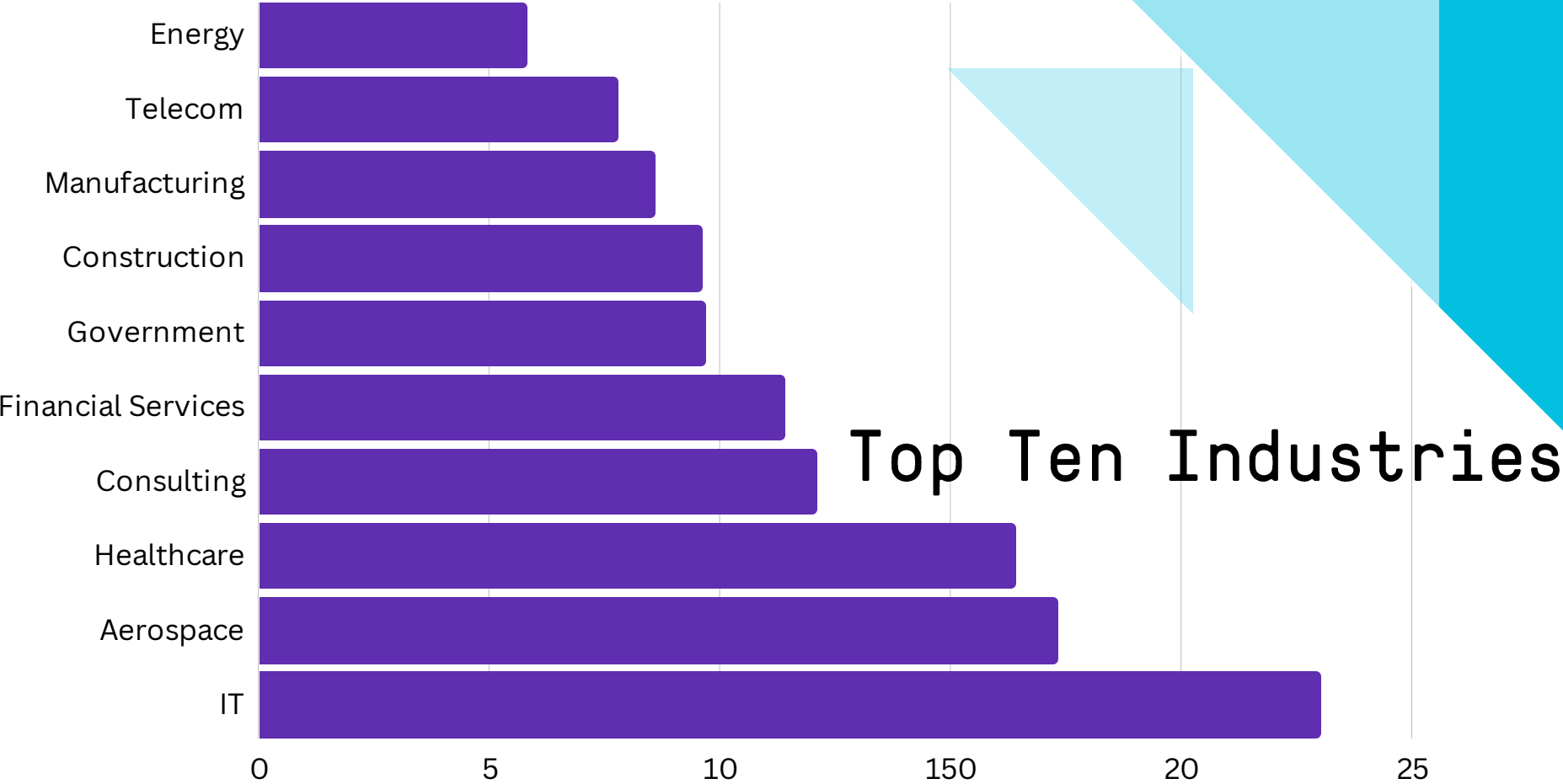
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Key Metrics -

1127

Total Active
Certifications Held



PMI - Fort Worth Chapter

Annual Financial Report

Reserves - December 2021	\$245,765
2022 Incoming Funds (Gross Receipts)	\$63,482
2022 Expenses	\$27,279
Reserves - December 2022	\$281,968

Cash in Bank	
Wells Fargo - Checking	\$119,501
Wells Fargo - Savings	\$35,030
Ameriprise Investments	\$127,437
Total	\$281,968

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Annual Financial Report

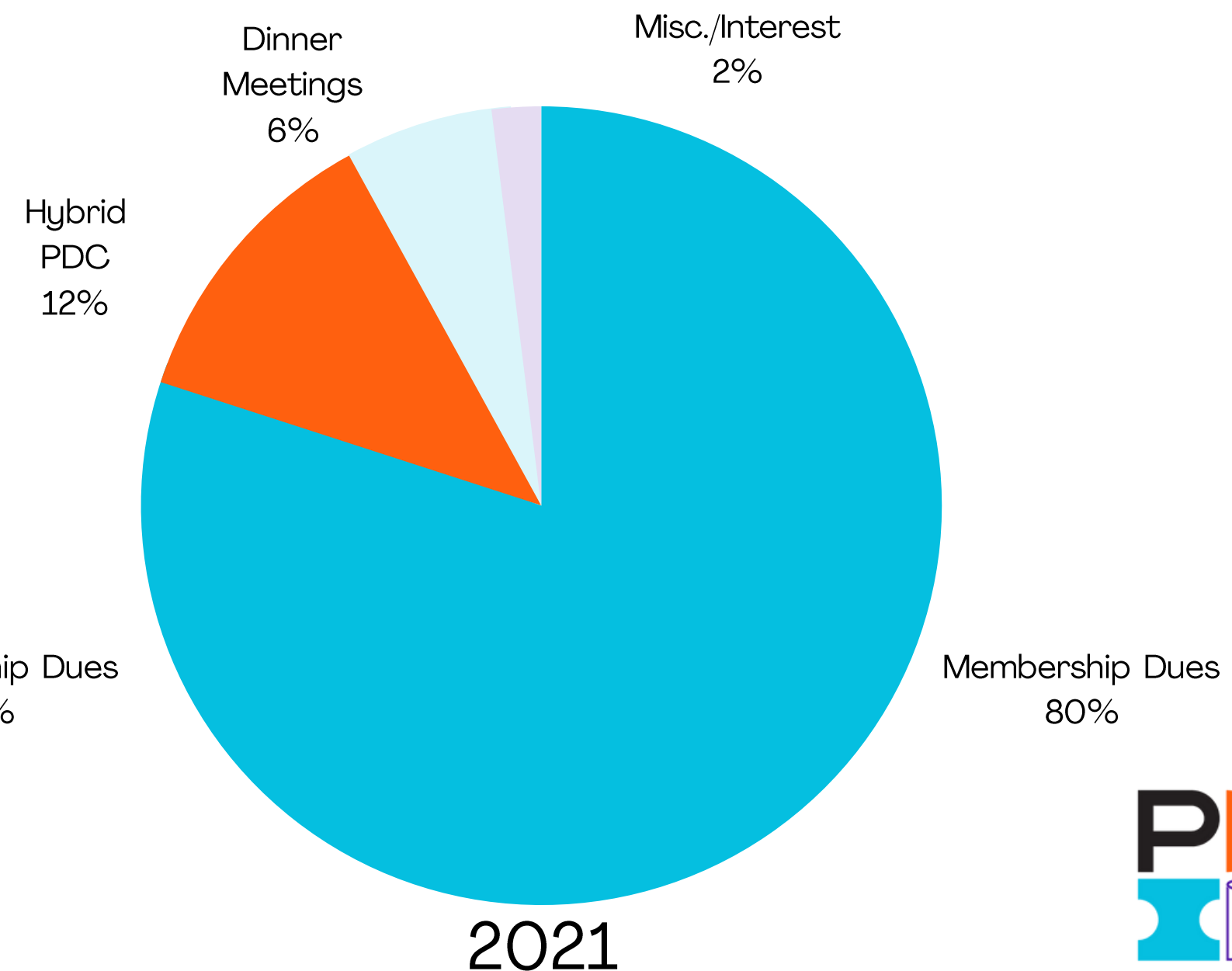
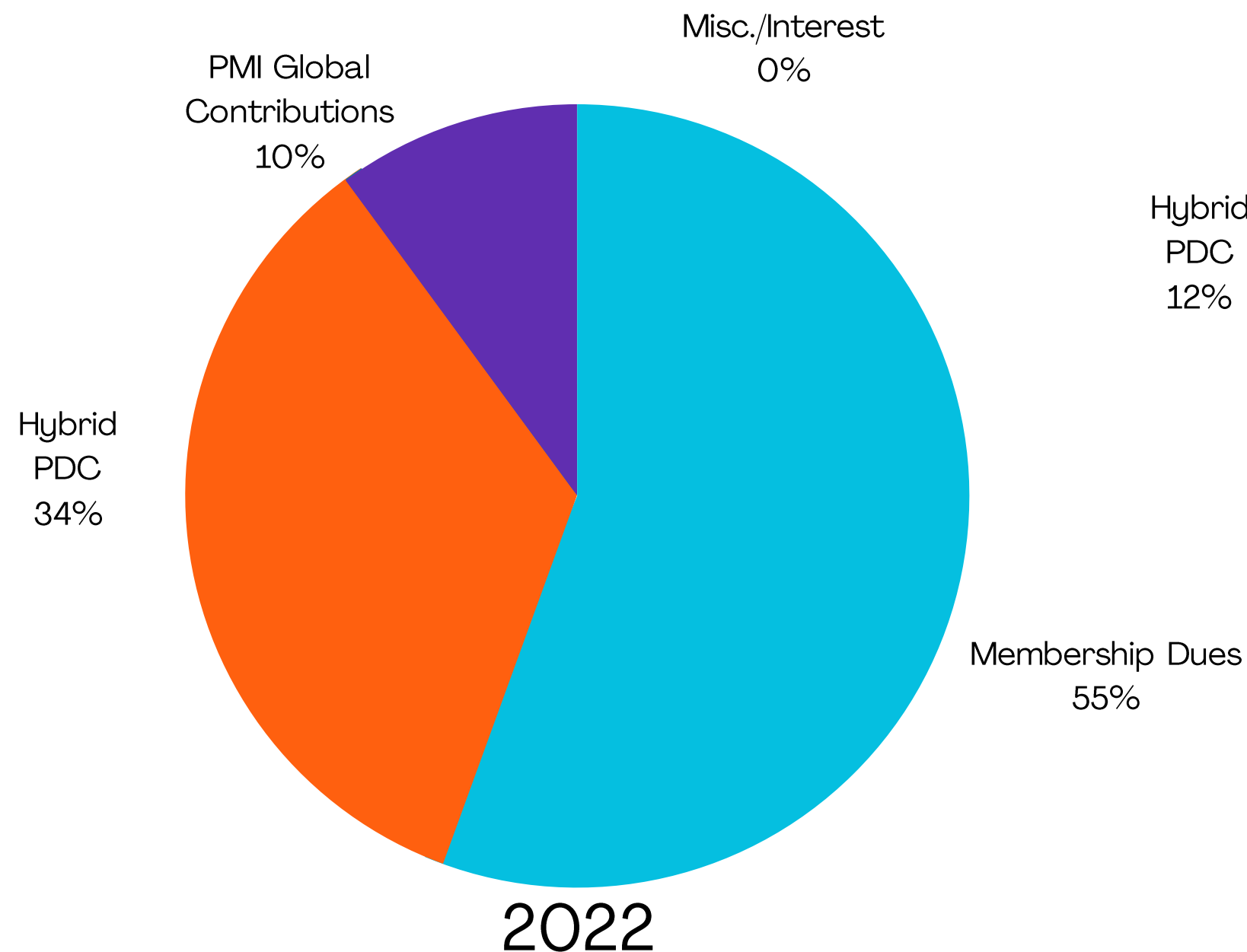
	2022	2021	Variance	Notes
Total Revenue	\$63,481	\$41,795	\$21,686	Membership dues and PDC made up %89% of revenue for 2022. Other payment rec'd were from PMI Global. Total revenue for 2022 was 152% amount rec'd in 2021.
Membership Dues	\$34,691	\$34,210	\$481	Membership Dues Revenue for 2022 was 101% amount rec'd in 2021.
Program Events (Hybrid PDC, Meetings)	\$21,837	\$13,024	\$8,813	Program Even Revenue for 2022 was 167% of the amount rec'd in 2021.

Total Expense	\$27,278	\$36,775	\$9,497	Virtual dinner meetings only; PDC held in hybrid format; cont'd implementation of new chapter website; officer trainings held virtually. Total expenses for 2022 was 74% of amount expensed in 2021.
Dinner Meetings (Virtual)	\$0	\$4,835	\$4,832	Meetings were virtual at no cost.
PDC (Hybrid)	\$12,739	\$2,843	(\$9,896)	PDC was hybrid with both in-person and virtual option.
Volunteer Leadership Development	\$1,986	\$833	(\$1,153)	Virtual based trainings/meetings.

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Revenue Sources -

The revenue composition for the Project Management Institute (PMI) Chapter of Fort Worth underwent significant changes in FY 2022 compared to FY 2021. The most noteworthy positive difference was the surge in revenue from Hybrid Professional Development Conference (PDC), which increased from 12% to 34%. This increase can be attributed to the resumption of in-person activities following COVID-19 pandemic restrictions, highlighting successful adaptation and heightened demand for professional development opportunities.



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Key Accomplishments

- 01 Return to in-person dinner meetings.
- 02 On-time delivery of 12 monthly newsletters.

100%
Uptime Website



PROFESSIONAL DEVELOPMENT CONFERENCE

113
Participants

- 57 In-Person
- 56 Virtual



16
Speakers

- Johnny Quinn
- Kari Mirabal

Thinking Like an Olympian



Book Club

- 24 Meetings Held
- 12 Titles

Toastmasters

- 24 Meetings Held



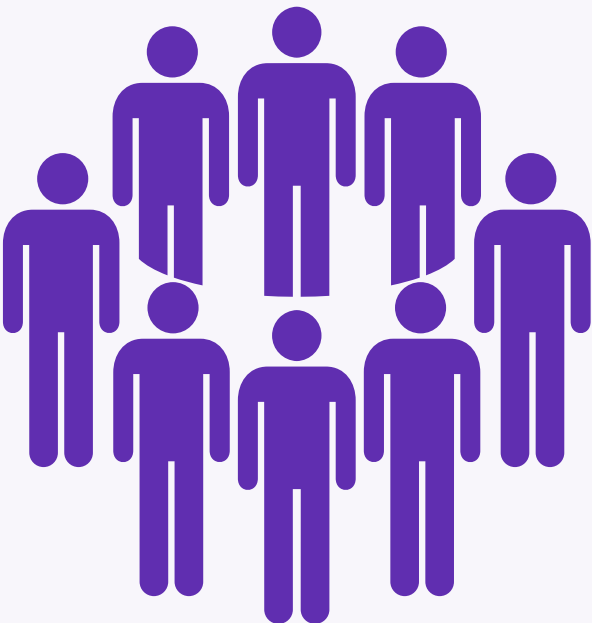
PROGRAMS



MENTORSHIP

12 Paired Mentors/Mentees
with monthly meetings.

I took this relationship on because I believe we can add value and experience in this mentee's efforts to move [their] career to the next level.



COMMUNITY OUTREACH

- Judges for Future Cities Regional Competition
- Directors of Volunteers in Agencies (DOVIA)
- InnoTech Conference
- TCU Nonprofit Conference

SOCIAL MEDIA



4,135

Newsletter
Contacts





PMI - Fort Worth Chapter

Annual Goals -

COMPLETE

- Develop "Welcome" email to all new members, listing out the benefits available to them through FWPMI.
- Create New Member Page on the chapter website that guides new members through what they should know about the chapter.
- Invite current members to be guests speakers at chapter events.
- Offer project management educational scholarship - Congratulations 2023 Scholarship Winner Ben Gonzales!

IN-PROGRESS

- Rotate meeting venues around the chapter's geographical area.
- Invite speakers from other PMI chapters to be guest speakers at events.

TO START

- Follow-up with and gather feedback from members who do not renew their certifications and/or membership.
- Spotlight chapter members, e.g. Volunteer of the Month/Quarter; Spotlight on a Member, etc.

2023 PMI Chapter Leadership Impact Award -



Cindy Vandersleen
PMP, CSM
Past President (2019
- 2020)

12 PMI individuals were
selected world-wide to
receive this prestigious
award.

Congratulations Cindy and
THANK YOU!



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Annual Fort Worth PMI

Professional Development Conference 2023

13 September

Featuring Keynote Speaker:

Kari Mirabal

Be Fearless: Unleashing Potential

Bold Learning for Project Professionals





Welcome, Melissa Bennett!

Melissa Bennett
PMI Region 6 Engagement
Specialist



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PMI Culture Values

Make It Easy

We are easy to deal with.

When things slow us down, we find a better way.

We prioritize the impact that matters most and take the most direct route to it.

Aim Higher

We set the standard in top quality work to create the greatest impact for the PMI community.

We lead the way by thinking long-term and acting in the short-term.

We fearlessly take ownership of what we do, knowing every action counts.

Be Welcoming

We create genuine belonging for all, because our differences make us stronger.

We act with humanity, showing care, empathy and respect for others' needs.

We assume good intent and seek to understand, not judge.

Embrace Curiosity

We are always seeking ways to better serve the PMI community.

We see challenges as opportunities to innovate, and take them.

We feel able to fail fast in order to get it right.

Together We Can

We build deep, trusting relationships that help us work towards our mission together.

We use our shared purpose to unite us as a community and drive us forward to create impact.

We act in alignment with our global goals, while being empowered to deliver locally.



Make It Easy

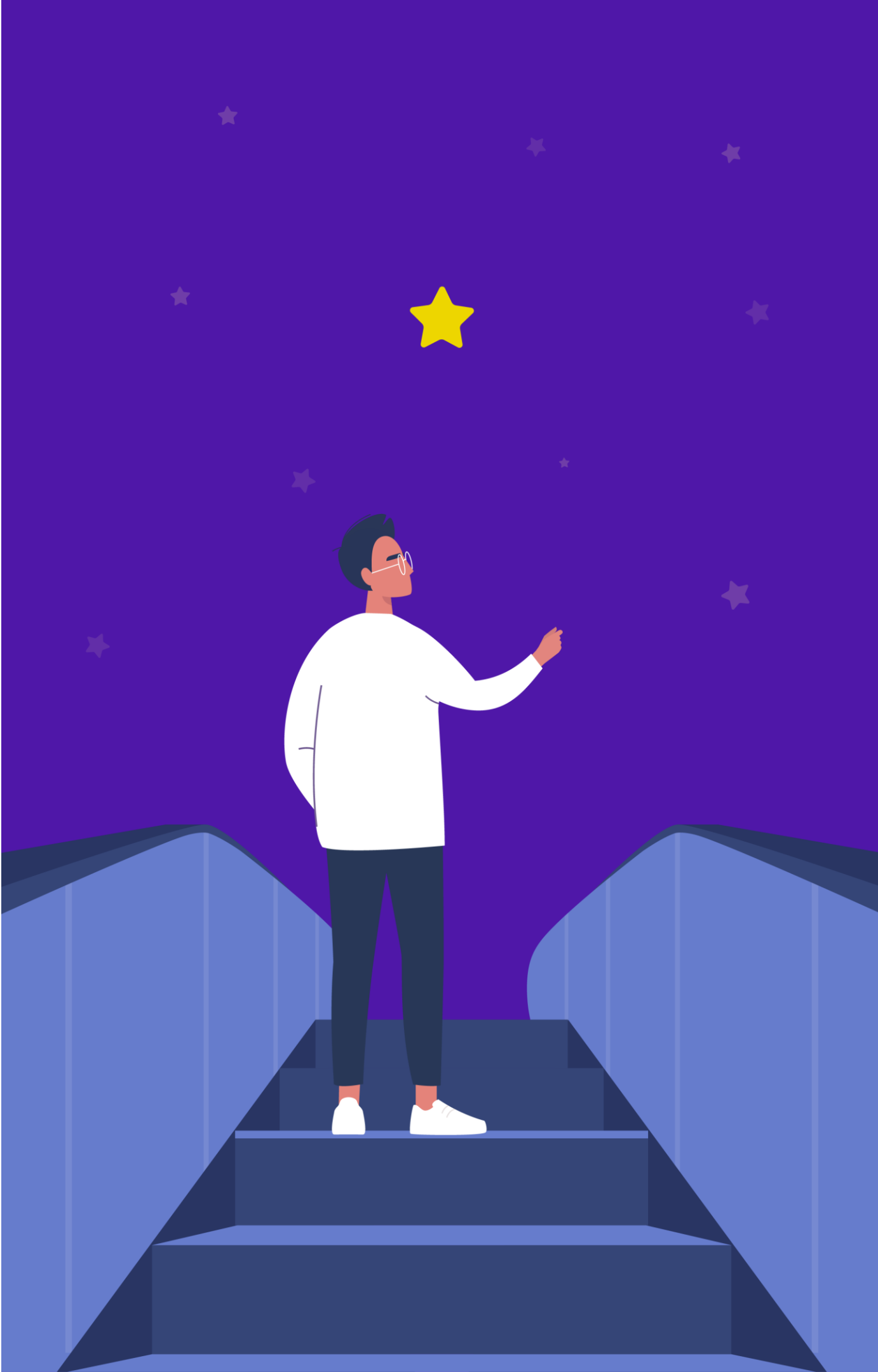
We are easy to deal with.

When things slow us down, we find a better way.

We prioritize the impact that matters most and take the most direct route to it.

Behaviors:

- I speak with candor and kindness to get to the right outcome quickly
- I enable clear, simple and transparent communication and interaction that aligns with the needs of those involved
- I reduce complexity and remove barriers wherever possible
- I involve the right people in the right way
- I act fast where possible, seek input where needed and have the experience and/or data to support my decisions
- I say 'no' to some things, in order to be able to say 'yes' to the ones that matter most



Aim Higher

We set the standard in top quality work to create the greatest impact for the PMI community.

We lead the way by thinking long-term and acting in the short-term.

We fearlessly take ownership of what we do, knowing every action counts.

Behaviors:

- I consistently deliver excellent experiences and work, and am always seeking ways to do better
- I stay on top of industry trends and use these insights to drive even higher quality in what I do
- I act quickly, sustainably and take smart risks, while being mindful of the long-term impact
- I am self-aware and regularly seek out feedback, welcoming it as a route to personal growth
- I have a bias for action and take responsibility for the outcome
- I act ethically and with integrity, always following through on my commitments and trusting others to do the same



Be Welcoming

We create genuine belonging for all, because our differences make us stronger.

We act with humanity, showing care, empathy and respect for others' needs.

We assume good intent and seek to understand, not judge.

Behaviors:

- I speak out when there are instances of disrespect, bias, or discrimination
- I create safe, supportive and respectful environments where we can all voice our needs, and every voice is heard
- I am mindful of my own biases and background
- I take time to understand others' unique backgrounds, needs, experiences and perspectives
- I empathize with others, see the best in them and find opportunities for us to succeed in partnership
- I prioritize my own wellness and mental health, and make space for others to do the same



Embrace Curiosity

We are always seeking ways to better serve the PMI community.

We see challenges as opportunities to innovate, and take them.

We feel able to fail fast in order to get it right.

Behaviors:

- I think critically and suggest solutions that could better meet the needs of the PMI community
- I look beyond PMI to find new ways to create value and improve
- I take the initiative and the responsibility for solving the problems I face
- I stay open-minded, inquisitive and embrace opportunities to change
- I create an environment where it's safe to experiment and share mistakes, as a route to improving
- I am constantly learning from others and recognize that there is always more than one possible 'right' path forward

Together We Can

We build deep, trusting relationships that help us work towards our mission together.

We use our shared purpose to unite us as a community and drive us forward to create impact.

We act in alignment with our global goals, while being empowered to deliver locally.

Behaviors:

- I build personal relationships that last, not just connections
- I listen to understand, and find ways to collaborate on solutions
- I celebrate successes and learnings, so we can all grow and move forward faster
- I support those around me, knowing that I can only succeed if we all succeed
- I give freedom within a clear framework, offering meaningful empowerment
- I consider the impact of my actions on all members of the PMI community, and act to create the best overall outcome in service of our mission



Be the ripple
PMI - Fort Worth Chapter
How Can You Help
“Be the Ripple”



PMI - Fort Worth Chapter

How Can You Help “Be the Ripple”

Make It Easy: Volunteer!

How do we measure success?
By the IMPACT of our Volunteers!



100,000 +
Individuals Interested in
Volunteering with PMI



10,000 +
Total Volunteers
Worldwide



3,600 +
PMI Chapter
Volunteers



300+
Chapters Worldwide



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Aim Higher: Pulse of the Profession® Power Skills

Top 4 Power Skills

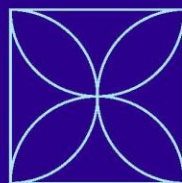
Every Project Professional Needs

There is wide consensus among those surveyed on the top four power skills that help project professionals drive project success. These four power skills are consistently the highest-ranked across industries, regions and other factors.



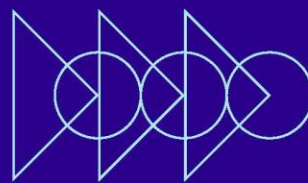
COMMUNICATION

Effective in explanation, writing and public speaking



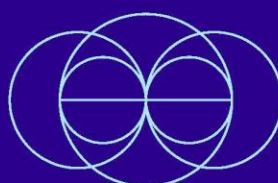
PROBLEM-SOLVING

Ability to figure out what is wrong and resolve it



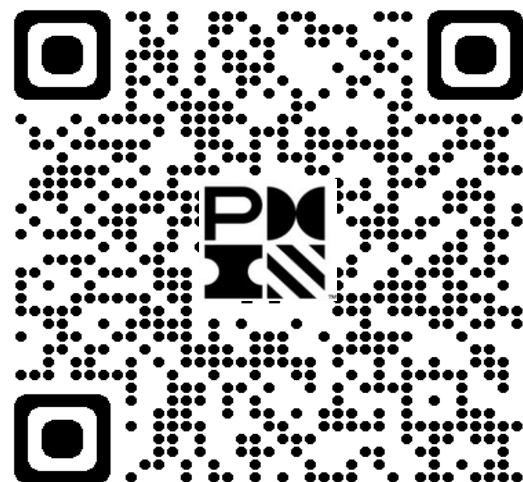
COLLABORATIVE LEADERSHIP

Ability to work with others across boundaries to make decisions



STRATEGIC THINKING

Ability to see patterns and alternative paths rather than complexity



TOP 4 Power Skills:

1. Communication

2. Problem-Solving

3. Collaborative Leadership

4. Strategic Thinking



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Embrace Curiosity:

Use Volunteering as an Opportunity to Grow Your Power Skills



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Is, Was & Always Will Be About Volunteers



1969

PMI is founded

1974

First Chapter formed in Houston, TX

1984

First PMP credential was awarded

1986

First PMBOK Guide Published

1990

PMI Educational Foundation established

1994

First NA Leadership Meeting with 75 attendees

1999

Governance shift to staff organization / strategic Board of Directors

2001

Global Accreditation Center established

2002

First Master Class held

2003

Expanded LIM to EMEA region

2004

Expanded LIM to LA and AP regions

2006

PMI Learn launched

2007

Leadership Institute Department formed

2011

PMI Core Value: Volunteer Service Excellence

2014

PM.com joins the PMI family

2015

Graduated First Master Class after redesign

2017

Virtual Chapter Leader Orientation

2019

PMI turns 50: 10,000+ volunteers and /300 Chapters; Regionalization efforts begin

2020

2.0 Transformation; PMI manages Covid-19 Pandemic

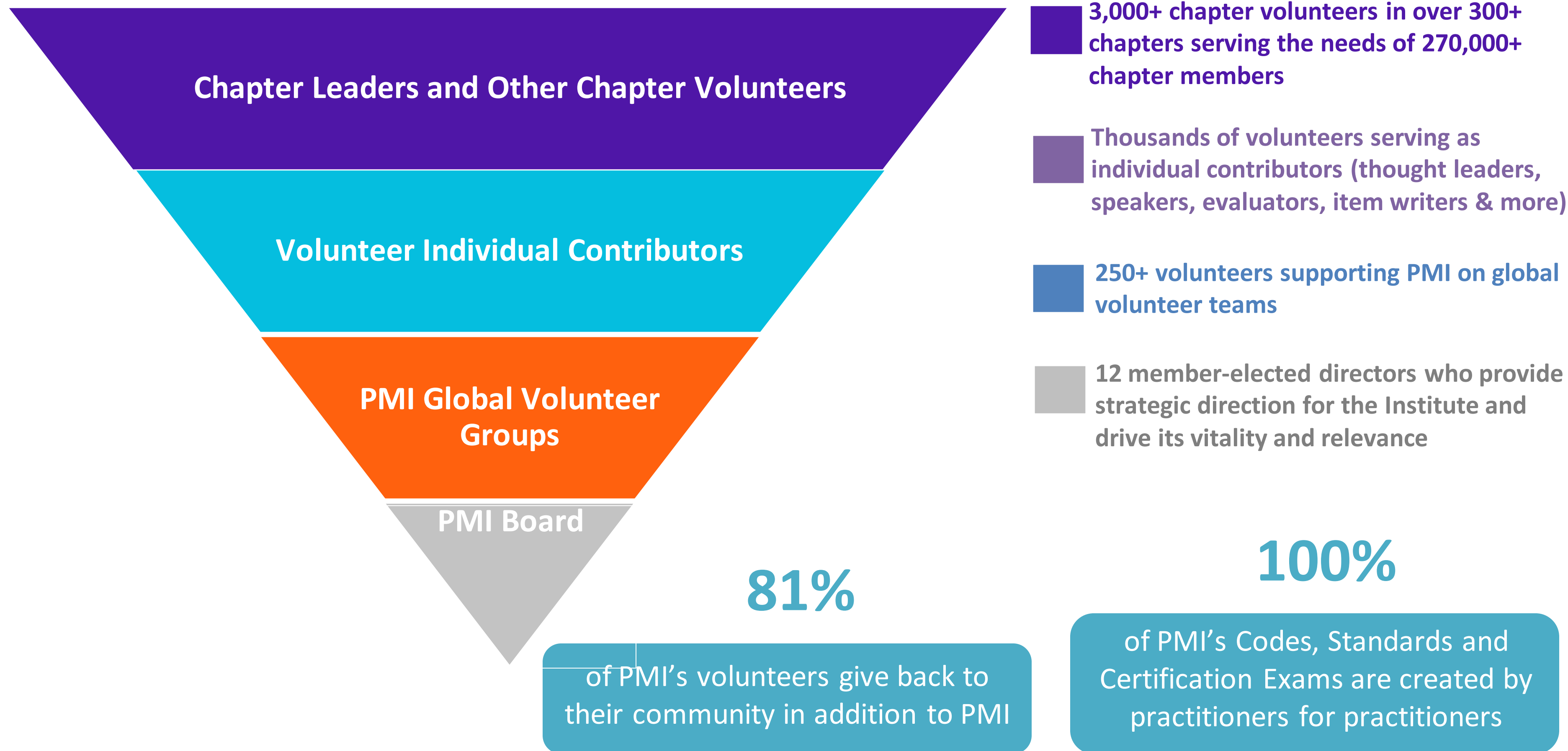
2021

Prepare for the future (PMI 4.0)

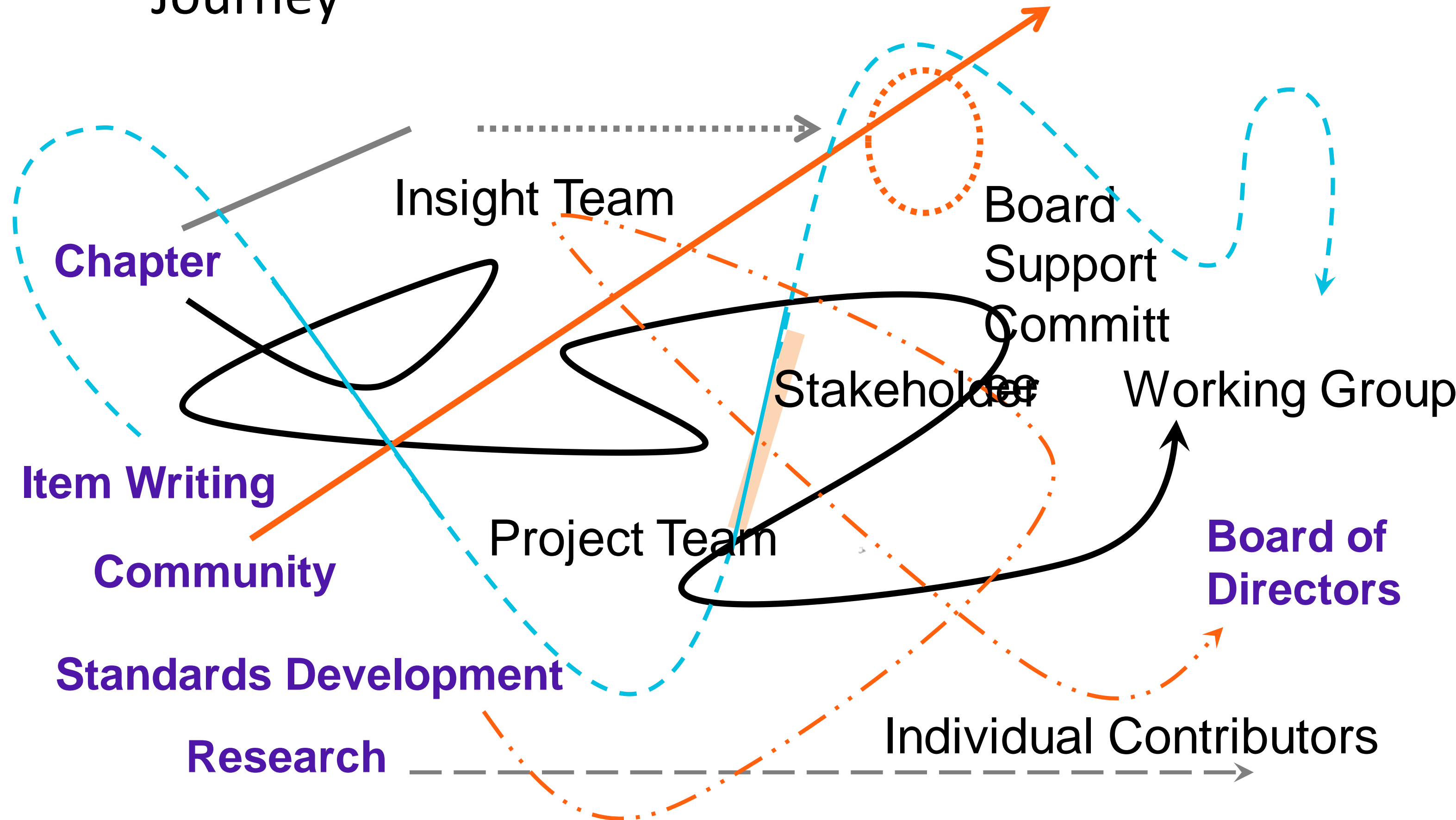
2022

Return to in-person events; introduction of Global Chapter and Volunteer Engagement

PMI's 11,000+ Volunteers and their **IMPACT**



A “Typical” PMI Volunteer Journey



Impact of Volunteering Throughout Your Career:

- Gain PM experience
- Find a mentor
- Learn the language
- Get exposure
- Build credibility
- Grow your network

Early Career

0-10 years
of PM Experience



“I want to improve in my daily responsibilities and say to people in my organization that I’m serious about project management.”

Impact of Volunteering Throughout Your Career:

- Get credit for your experience
- Add specializations
- Hone skills
- Develop soft skills
- Learn management techniques

Mid-Career

10-25 years
of PM Experience



“I attribute all of my successes since I received my PMP in 2007 to the volunteering I do with my chapter.”

Impact of Volunteering Throughout Your Career:

Mentor others

Give back

Be recognized as a PM pro/subject
matter expert

Late Career

25+ years
of PM Experience



“[I have presented at non-PMI conferences around the world.]
None of this would have happened if I had not made so many
connections through PMI volunteering.”

PMI's Investment into Volunteer Development, Training and Resources

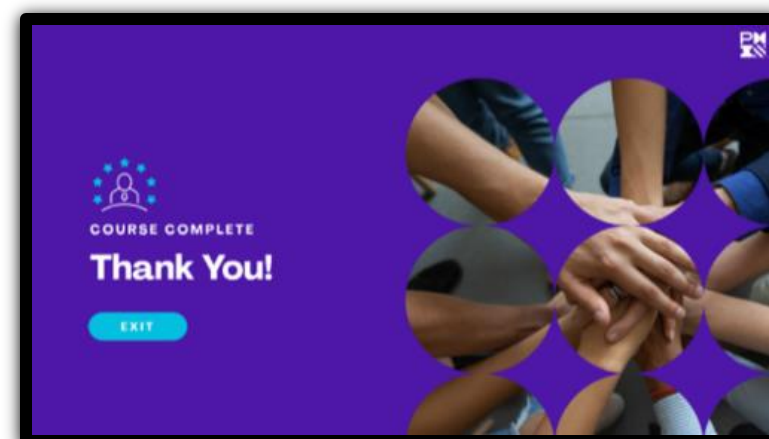
Leadership Institute

Offers trainings and orientations

- In-person, virtual, on-demand

Empowers PMI volunteers to:

- Share best practices
- Collaborate
- Acquire new skills and experiences
- Network globally and locally



Marketing Portal

Provides volunteers with on-demand access to:

- An asset library
- Branding materials (logos, templates, guidelines)
- Toolkits and guides

BRAND GUIDELINES, TEMPLATES, LOGOS



PMInsight

Go to place for everything volunteers need to know, including, but not limited to:

- PMI news and updates
- Engagement opportunities
- Tools and resources
- Event information
- Support and guidance



Interested in a Volunteer Opportunity with the Fort Worth Chapter?

volunteer.pmi.org

Access VEP using single sign-on (PMI.org login information)

Update your Volunteer Service History, Resume, Add areas of interest, etc, and start search for opportunities!!

Or Contact **Latha Thamma reddy**
volunteer@fwpmi.org

volunteer.pmi.org/OpportunitySearch/?restore=true

Region Reports Personal Social Media Tools Tips & Tricks

Project Management Institute.

myPMI Dashboard

Volunteering

Find an Opportunity

Profile

Your Applications

Learn About Recruiting

Switch to Recruiting

Contact Us

Find the Perfect Volunteer Opportunity

Where would you like to volunteer?

Any Country/Region

Chapter/Global Headquarters (GHQ)

Fort Worth Chapter

How would you like to volunteer?

All Interaction Types

Narrow your results with search terms

See More

Search

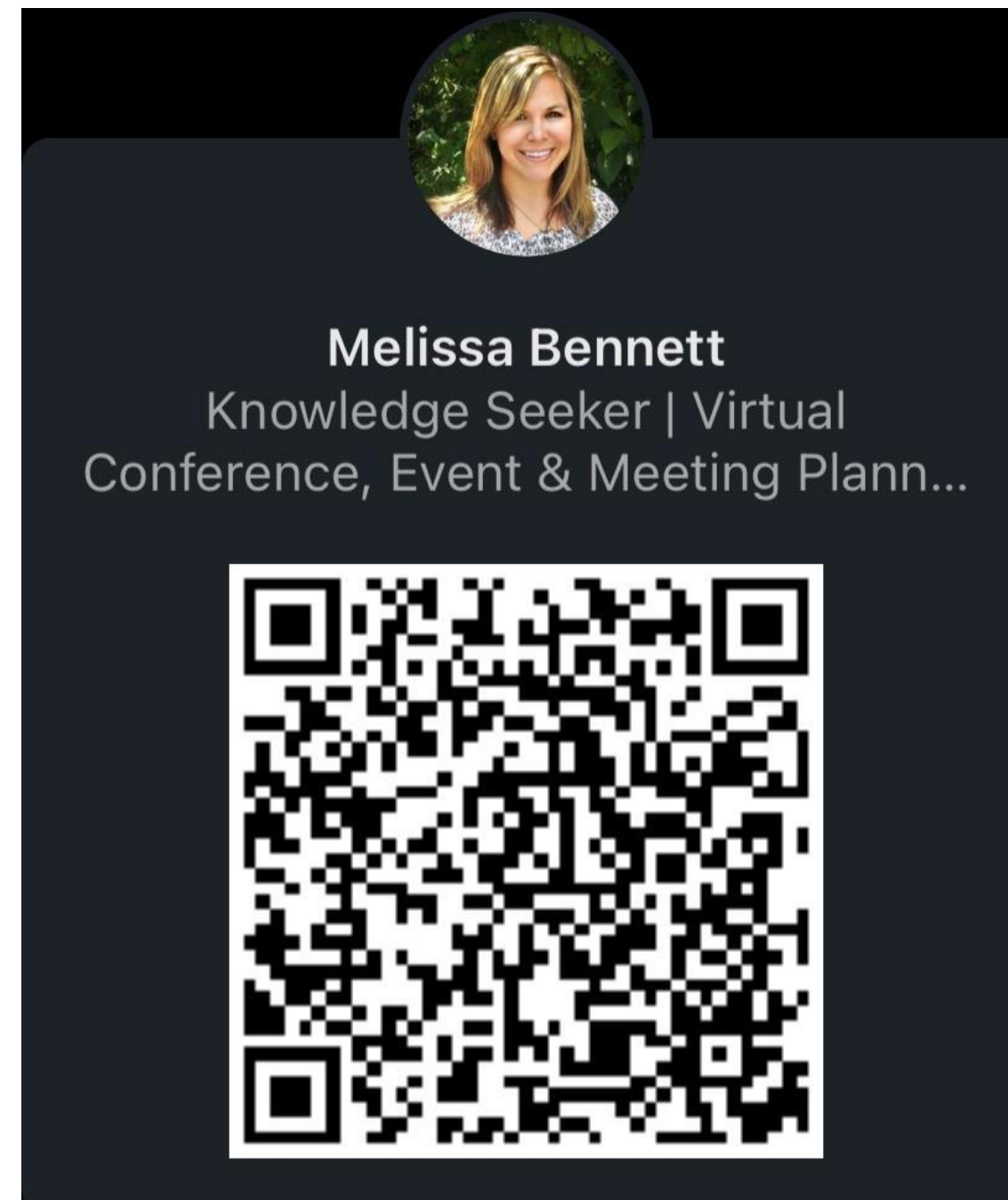
Name	Location	Interaction Type	Chapter/Global Headquarters (GHQ)
Vice President Operations	TX, United States	In-Person and Virtual	Fort Worth Chapter
Director of Finance	TX, United	In-Person and	Fort Worth Chapter

Together We Can



Be Welcoming: Questions? & Thank you!

melissa.bennett@pmi.org



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