



Fort Worth Chapter of the Project Management Institute

Annual Business Meeting

June 2015

Fort Worth Chapter

- 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.

Board of Directors

President
Michele Gagne
PMP



Past President
Nikki Choyce
PMP



Professional Development
Rashidi Benson
PMP



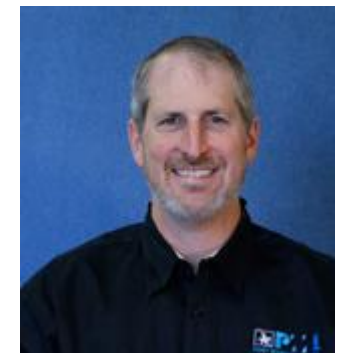
External Relations
Luiz da Silva
PMP



Internal Relations
Lorraine Leonard
PMP



Operations
Brad Worley
PMP



Professional Development Leadership Team

Level	Title	Name
4	VP Professional Development	Rashidi Benson
3	Director Of Speaker Management	{Open}
2	Speaker Coordinator	{Open}
3	Director Of Event Management	Patsy Haines
		Hyon-Chin Keoughan
2	Book Club Manager	
2	Book club (north) coordinator	Bruce Falcon
2	Book club (south) coordinator	Cheryl Medina
3	Director of Education	Trudy Wade
2	Workshop Coordinator	Kathryn Foster
2	Webinar Coordinator	{Open}
3	Director of Administration	Shaun Smith
2	REP Coordinator	Kevin Kelley
	Knowledge Content Community Engagement Coordinator	
2		Bob Goble
2	Rolling PowerPoint preso	Glenna Wheatley
3	PDD Director (2015)	Denise Stafford
2	Social Events	{Open}

VP Professional
Development
Rashidi Benson
PMP



External Relations Leadership Team

Level	Title	Name
4	VP External Relations	Luiz da Silva
3	Director Of Communications	Nikita Patil
2	E-Newsletter Manager	Steve Tefertiller
2	Website Administrator	Jonathan Chrisawn
2	Manager Of Email Publications	Steve Tefertiller
2	Social Media Manager	Nina Franks
3	Director Of Marketing	{Open}
2	Sponsor Program Manager	{Open}
3	Director Of Outreach	Glenna Wheatley
2	RCC Program Manager	Tanja Bell
2	Academic Outreach Manager	Cindy VanderSleen
2	PMIEF Liaison	Cindy VanderSleen
2	Community Outreach Manager	Jeff Harris

VP External Relations

Luiz da Silva

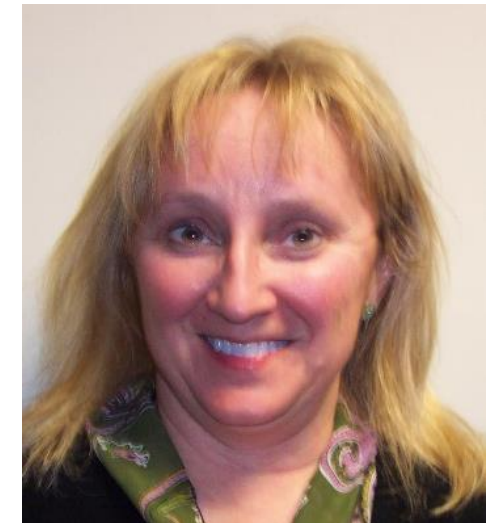
PMP



Internal Relations Leadership Team

Level	Title	Name
4	VP Internal Relations	Lorraine Leonard
3	Director Membership	Lance Beaty
2	Job Board Manager	Elva Nyatenya
		{Open}
2	New Member welcome packages	Mary Moye
2	Member Recognition Coordinator	Donna Worley
3	Director Of Volunteer Management	Andrea Benson
2	Volunteer Recruitment Manager	Melissa Arnett
2	Volunteer Opportunities Manager	Juanita Samarripa
3	Director Of Member Services	Lynn Robbins
2	New Member Orientation webinar facilitator	{Open}
2	Volunteer Orientation webinar facilitator	{Open}
2	Onboarding specialist	{Open}
3	Director of Mentoring	Trish McManus

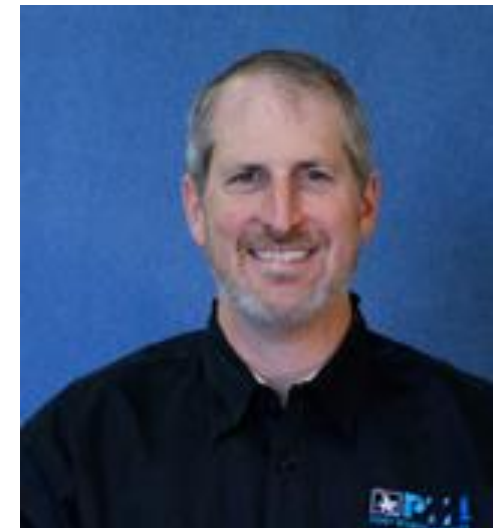
VP Internal Relations Lorraine Leonard PMP



Operations Leadership Team

Level	Title	Name
4	VP Operations	Brad Worley
3	Director Of Finance	Gina Reyna
2	Vendor Relations Manager	Mai Tran
2	Asset Manager	Mai Tran
2	Event Close-Out Coordinator	Gina Reyna
2	Business Analytics Manager	Adam Lang
2	PDD Finance Manager	Brad Worley
2	Workshop Finance Manager	Bill Thomas
2	Dinner Meeting Finance Manager	Gina Reyna
2	Lunch Meeting Finance Manager	Geary Gowins
2	Event Analysis	Adam Lang
3	Director of Operations Technology	Rudy Ramos
2	Records Management	Brad Worley
2	System Administrators	Rudy Ramos
2	System Administrators	Anji Jack-Spears
2	System Administrators	Jose Murillo
2	Email Administrator	Nazi Mehrooz
3	Director of Administration	Mai Tran
2	Polices and Procedures Manager	Mai Tran
2	Chapter Secretary	Mai Tran
2	Chapter Governance and Fraud Protection	Mai Tran
2	Historian	Dick Walz

VP Operations
Brad Worley
PMP



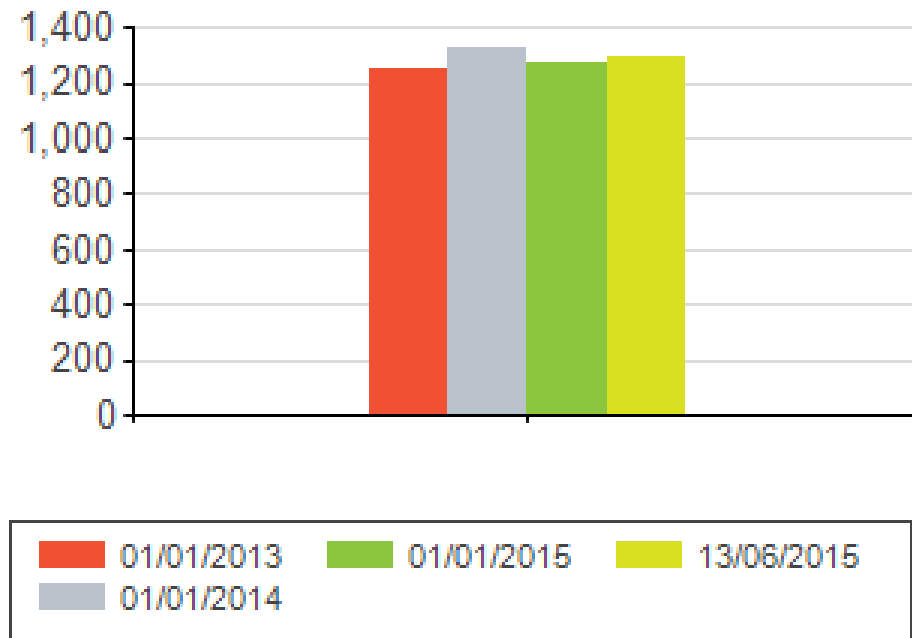
Award Winning Chapter

Year	Award
2010	Recognition of Excellence
	Toastmasters Outstanding Officers
2011	Chapter of the Year
2012	Chapter of the Year
	Volunteer Programs
	Leadership, Planning, Operations
2013	Leadership, Planning, Operations
	Leader of the Year
2014	Volunteer Programs

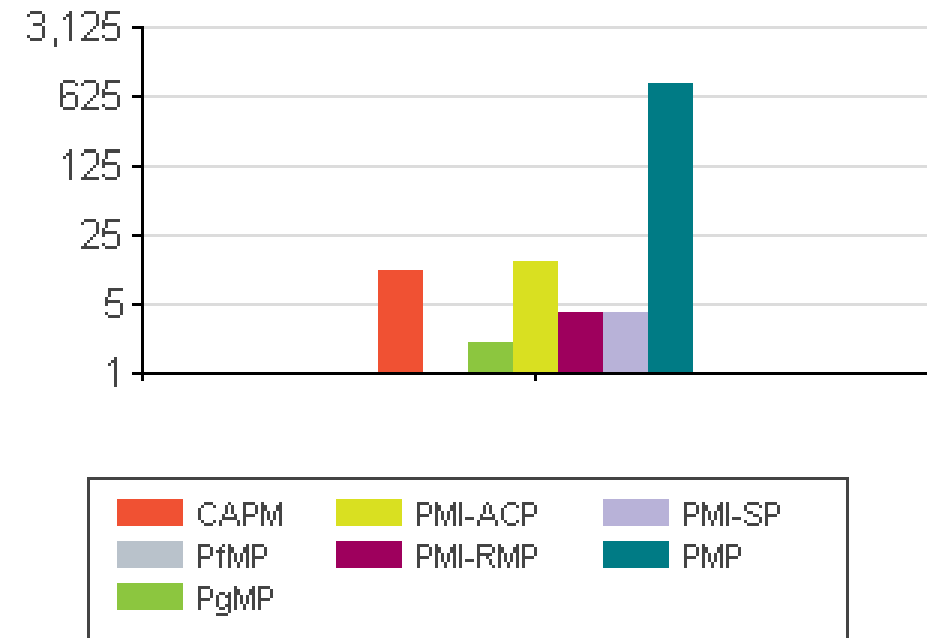


Key Metrics

Membership Count



Membership Credentials



PMI Annual Survey Member Satisfaction



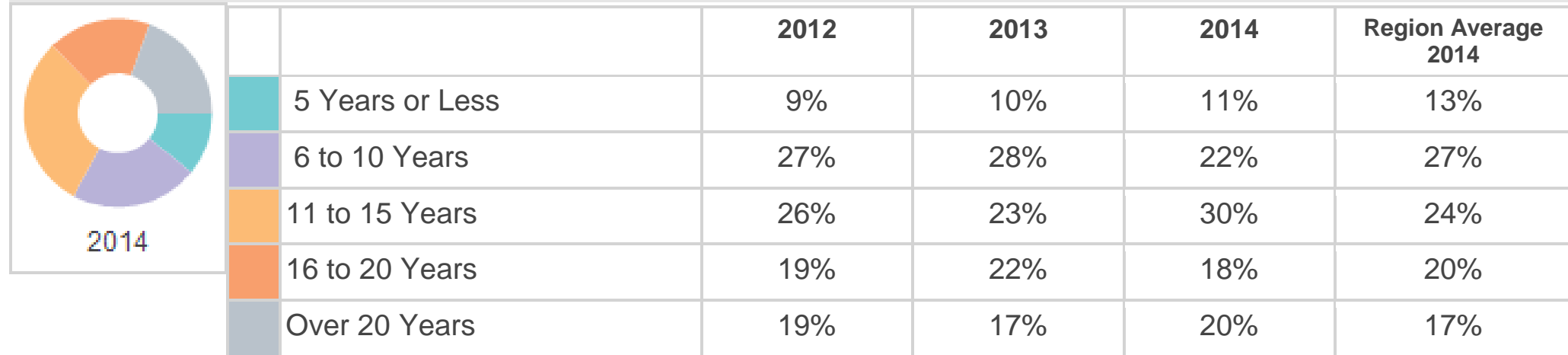
Satisfaction Results	Chapter	Region 6	Difference
Overall Satisfaction Top 2 Aggregate	75 %	73 %	2 %
Overall Satisfaction Mean Score	4.2	4.1	0.1
Likelihood to recommend the Chapter	74 %	72 %	2 %
Likelihood to Renew Chapter Membership	83 %	80 %	3 %
Overall Value of Chapter Membership	64 %	58 %	6 %

Chapter Data	Chapter	Region 6	Difference
Total Number of Chapter Members at Year End	1,314	24,128	N/A
Change in Membership from Previous Year	-1 %	4 %	-5 %
New Members Added in Business Year	381	7,083	N/A
Annual Attrition Rate	30 %	27 %	3 %

Survey Response Rate 15%

Member Background

Years in Project Management



Age

	2012	2013	2014	Region Average 2014
24 or Under	0%	0%	0%	0%
25 to 35	3%	7%	7%	10%
36 to 45	23%	18%	20%	25%
46 to 55	43%	36%	38%	36%
56 to 64	22%	27%	26%	25%
Over 64	8%	12%	8%	4%

2014 Highlights



- Recipient of PMI Chapter Award for Volunteer Programs
- Awarded 3 Scholarships
- Implemented ITMPI Ambassador Program



- Academic Outreach w/ DeVry
- Association Outreach w/ SAME



- Held monthly lunch & dinner meetings
- Conducted 3 PMP Exam Prep workshop
- Conducted 4 Skills Development Workshops
- Hosted Professional Development Day

2015 YTD Highlights



- Awarded 3 Scholarships
- Implemented Chapter Guest Pass Program
- Implemented Membership Referral Program



- Academic Outreach w/ DeVry
- Association Outreach w/ SAME
- Community Outreach w/Special Olympics



- Held monthly lunch & dinner meetings
- Conducted PMP Exam Prep workshop
- Hosted Professional Development Day

Members and Prospects Mapping

Count of Addresses (based on zip code)

Quadrant	Members in DEP			Prospects	Uber Total
	Home	Work	Preferred	Preferred	Preferred
NE	698	418	721	1,422	2,143
NW	125	65	129	249	378
SE	223	84	222	371	593
SW	141	106	150	273	423
Total	1,187	673	1,222	2,315	3,537

Quadrant % of Chapter Total

Quadrant	Members in DEP			Prospects	Uber Total
	Home	Work	Preferred	Preferred	Preferred
NE	59%	62%	59%	61%	61%
NW	11%	10%	11%	11%	11%
SE	19%	12%	18%	16%	17%
SW	12%	16%	12%	12%	12%
Total	100%	100%	100%	100%	100%

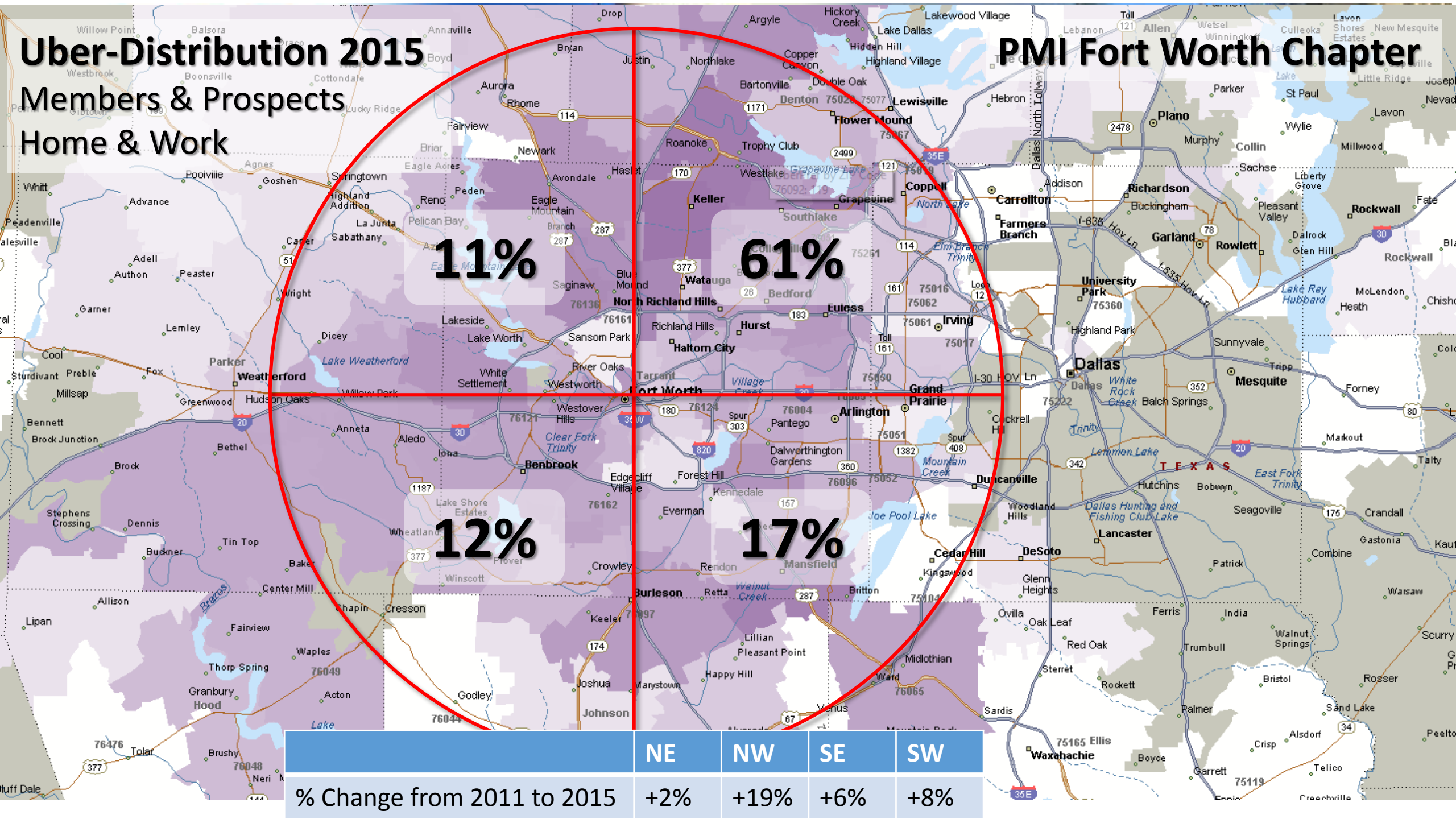
- Members and Prospects were mapped independently in order to assess whether there was any significant difference in distribution.
- The two sets of data yield almost identical results – meeting locations convenient to the NE quadrant support the greatest volume of potential attendees.

Uber-Distribution 2015

Members & Prospects

Home & Work

PMI Fort Worth Chapter



11%

61%

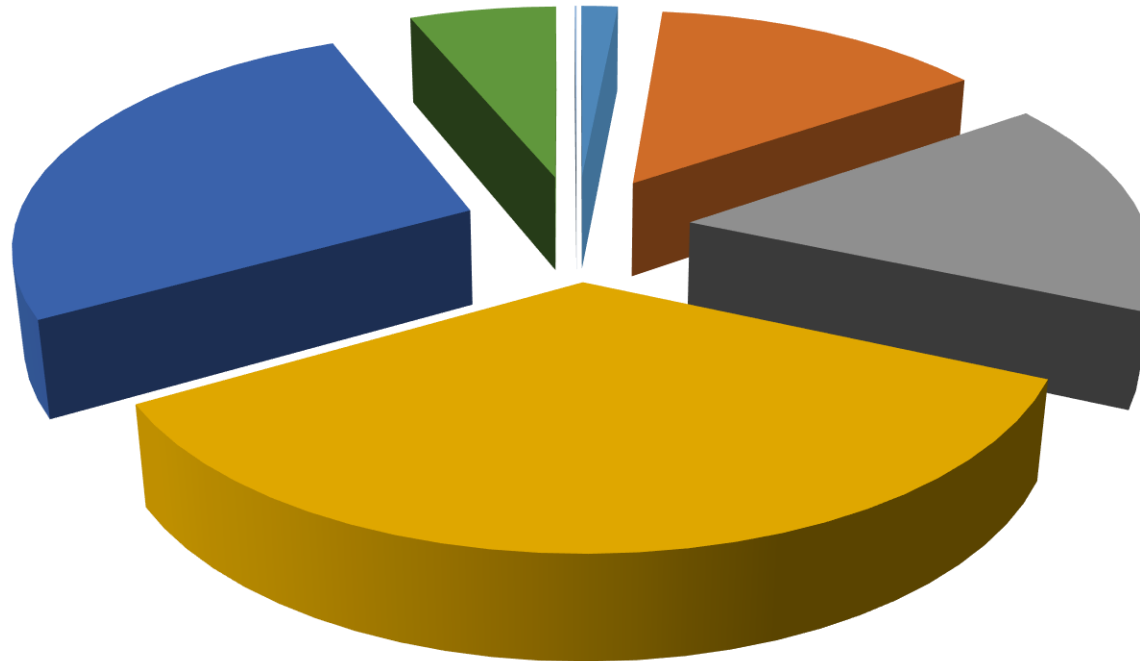
12%

17%

	NE	NW	SE	SW
% Change from 2011 to 2015	+2%	+19%	+6%	+8%

Annual Financial Report

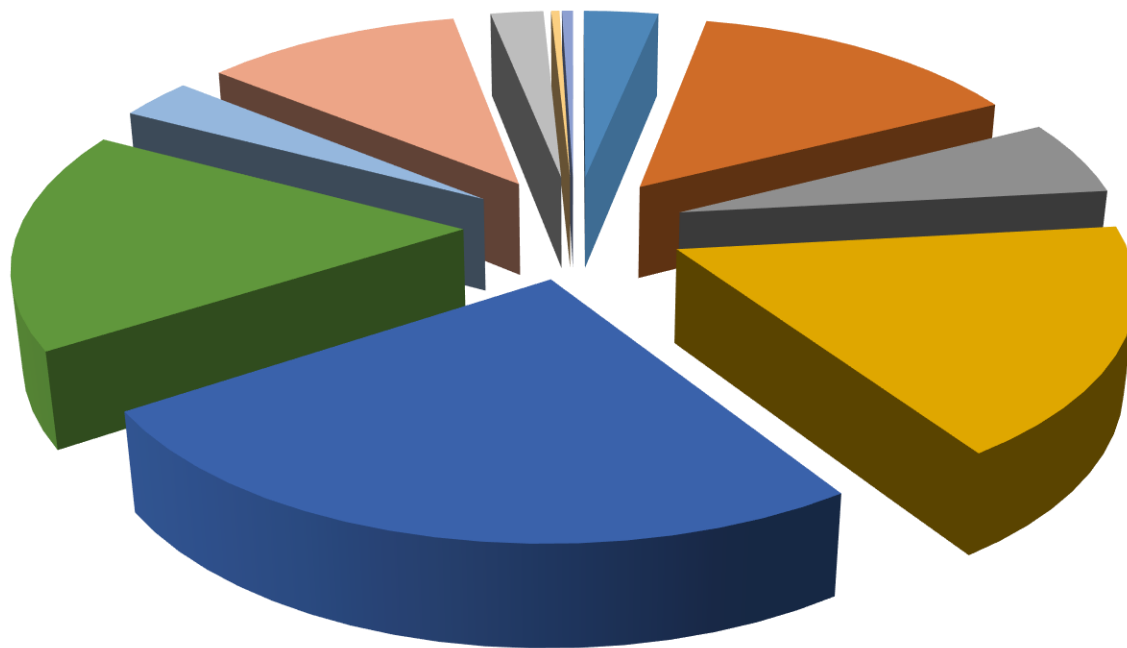
Income Breakout - \$119,752



- Lunch Meetings - \$1,829
- Dinner Meetings - \$16,668
- Workshops - \$19,244
- PDD - \$42,258
- Membership Dues - \$32,295
- Sponsorships - \$7,367
- Short-term Investments - \$91

Annual Financial Report

Expense Breakout - \$126,061



- Lunch Meetings - \$5,225
- Dinner Meetings - \$23,352
- Workshops - \$9,400
- PDD - \$28,397
- Events - \$41,117
- Leadership Development - \$27,429
- General & Admin - \$5,154
- Technology - \$18,015
- Outreach - \$3,707
- Awards & Recognition - \$588
- Professional Services - \$779

Annual Financial Report

Balance Sheet (Year-Over-Year Performance)

ASSETS	2010	2011	2012	2013	2014
Cash (Checking & Savings)	\$83,788	\$110,558	\$120,840	\$151,591	\$144,895
PayPal	\$599	\$1,126	\$7,580	\$0	\$10,196
Investments (CDs)	\$10,046	\$0	\$0	\$0	\$0
Receivables	\$0	\$4,175	\$0	\$0	\$0
Fixed Assets	\$0	\$73	\$73	\$73	\$73
Total Assets	\$94,433	\$115,932	\$128,493	\$151,664	\$155,164
LIABILITIES AND EQUITY					
Total Liabilities	\$522	\$0	\$0	\$0	\$0
Total Equity (Reserves)	\$93,871	\$115,932	\$128,494	\$151,664	\$155,164
Total Liabilities & Equity	\$94,393	\$115,932	\$128,494	\$151,664	\$155,164

Annual Financial Report

- **Budget Results**

Income: \$119,752 (8% decrease)

Expenses: \$126,061 (13% increase)



- **Items of Significance**

- + Membership growth for 2014
- + Events well attended
- + 2014 PDD Event was very successful on all measures
- + Increase in technology investments
- + Increase in Outreach investment

Thank you for another successful year!

*The 2015 Annual Report will be available
on the Chapter website.*

www.FWPMI.org

