



Fort Worth Chapter of the Project Management Institute

Annual Business Meeting

June 2016

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



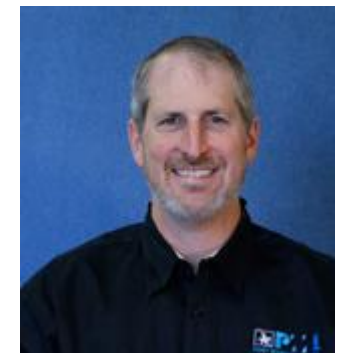
External Relations
Cindy Vandersleen
PMP



Internal Relations
Lorraine Leonard
PMP



Operations
Brad Worley
PMP



Professional Development Leadership Team

4	VP Professional Development	Rashidi Benson
3	Director Of Speaker Management	{Open}
2	Speaker Coordinator	{Open}
3	Director Of Event Management	Patsy Haines
2	Book Club Manager	{Open}
2	Book club (north) coordinator	Bruce Falcon
2	Book club (south) coordinator	Cheryl Medina
3	Director of Education	Lucy Johnson
2	Workshop Coordinator	Kathryn Foster
2	Webinar Coordinator	{Open}
3	Director of Administration	Jacqueline Pauly
2	REP Coordinator	Kevin Kelley
2	Knowledge Content Community Engagement Coordinator	Bob Goble
2	Rolling PowerPoint preso	Kelly Bearman
3	PDC Director (2016)	Denise Stafford
2	Social Events	{Open}

VP Professional
Development
Rashidi Benson
PMP



External Relations Leadership Team

4	VP External Relations	Cindy VanderSleen
3	Director Of Communications	{Open}
2	E-Newsletter Manager	Steve Tefertiller
2	Website Administrator	Jonathan Chrisawn
2	Manager Of Email Publications	Steve Tefertiller
2	Social Media Manager	Catherine Rosenau-Fryman
3	Director Of Marketing	{Open}
2	Sponsor Program Manager	{Open}
2	Promotional Materials Coordinator	{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	Military Liaison	Ron Prowell
2	Military Liaison	Sharron Frohner
2	Military Liaison	David Cloud
2	Military Liaison	John Koren
2	Community Outreach Manager	{Open}

VP External Relations
Cindy Vandersleen
PMP



Internal Relations Leadership Team

4	VP Internal Relations	Lorraine Leonard
3	Director Membership	Lance Beaty
2	Job Board Manager	Elva Nyatenya
		Donnel Greer
2	New Member welcome packages	Jan Moye
2	Member Recognition Coordinator	Donna Worley
3	Director Of Volunteer Management	{Open}
2	Volunteer Recruitment Manager	{Open}
2	Volunteer Opportunities Manager	{Open}
3	Director Of Member Services	Lynn Robbins
2	New Member Orientation webinar facilitator	Lynn Robbins
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

4	VP Operations	Brad Worley
3	Director Of Finance	{Open}
2	Vendor Relations Manager	Mai Tran
2	Asset Manager	Mai Tran
2	Event Close-Out Coordinator	Catherine Rosenau-Fryman
2	Business Analytics Manager	Adam Lang
2	PDD Finance Manager	Brad Worley
2	Workshop Finance Manager	Bill Thomas
2	Dinner Meeting Finance Manager	Catherine Rosenau-Fryman
2	Lunch Meeting Finance Manager	Geary Gowins
2	Event Analysis	Adam Lang
3	Director of Operations Technology	{Open}
2	Records Management	Brad Worley
2	System Administrators	{Open}
2	System Administrators	{Open}
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



Registered Company Coordinator (RCC) Program

Program Objective: To develop stronger relationships with local employers who promote and value project management as a critical competency within their business. To that end, this program strives to improve communications, coordination and recruitment of prospective chapter members.

Company

American Airlines
BNSF
City of Fort Worth
Cook Childrens
Corps of Engineers
DFW Airport
Elbit Systems
Fidelity Investments
JP Morgan Chase

RCC

Vicki Fox
Patricia McManus
Eric Epperson
Angela Miller
Glenna Wheatley
Sandy Stout
Joel Friedrich
Rachael Cooksey
James North

Company

Lockheed Martin
Nokia
Novartis (Alcon)
PierOne Imports
PDX Inc.
Sabre Holdings
Sogeti
US Federal Reserve System
Verizon

RCC

Alan Fletcher
Lon Gaston
Debbie Marth
Mandy Melbourne
Julie Farmer
Bonnie Crawford
Ben Merritt
Don Palmer
Ernie Kish

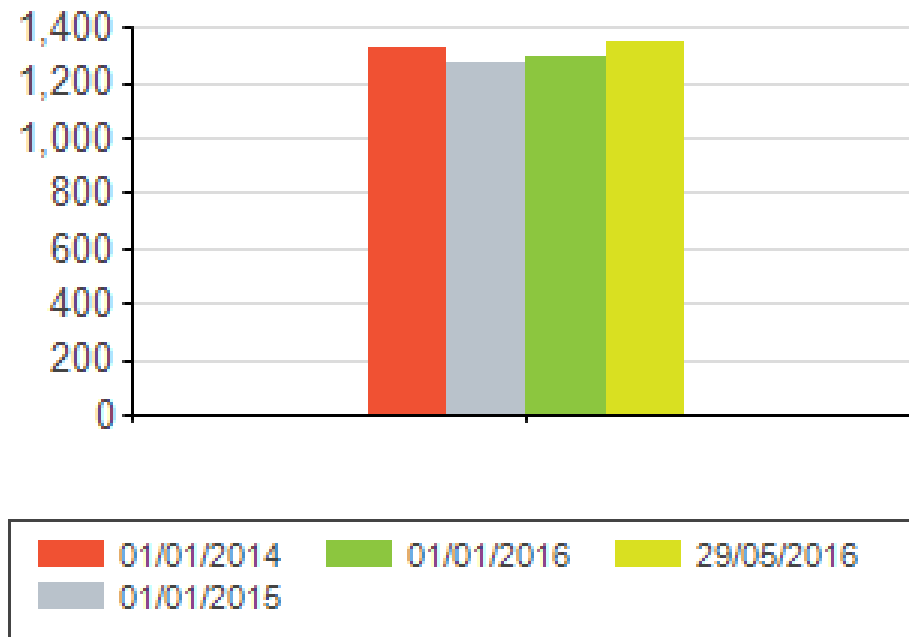
Award Winning Chapter

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 Chapter Leader of the Year – John Bartkus
2014	Volunteer Programs
2015	Chapter Volunteer of the Year – Brad Worley

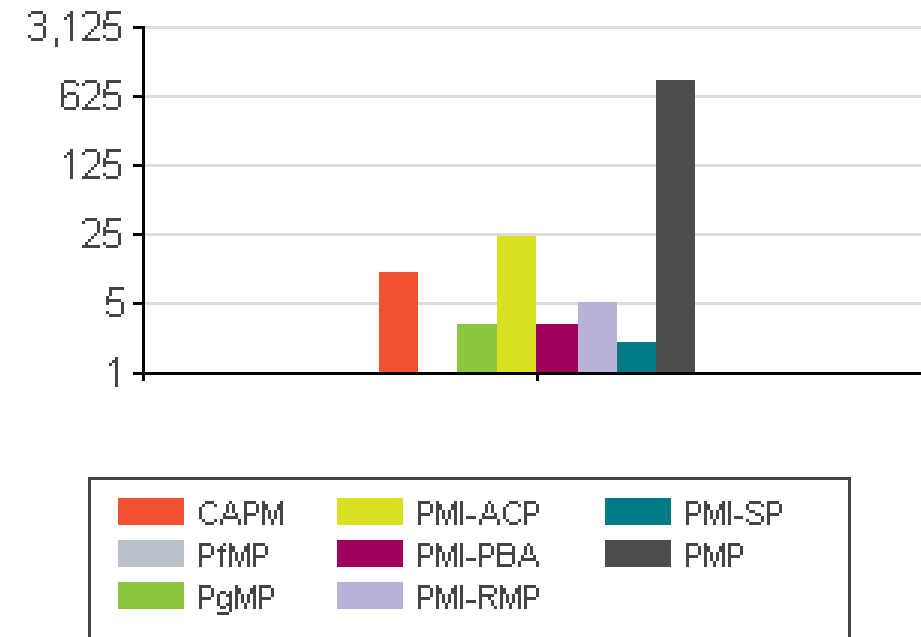


Key Metrics

Membership Count



Membership Credentials



PMI Annual Survey

Member Satisfaction



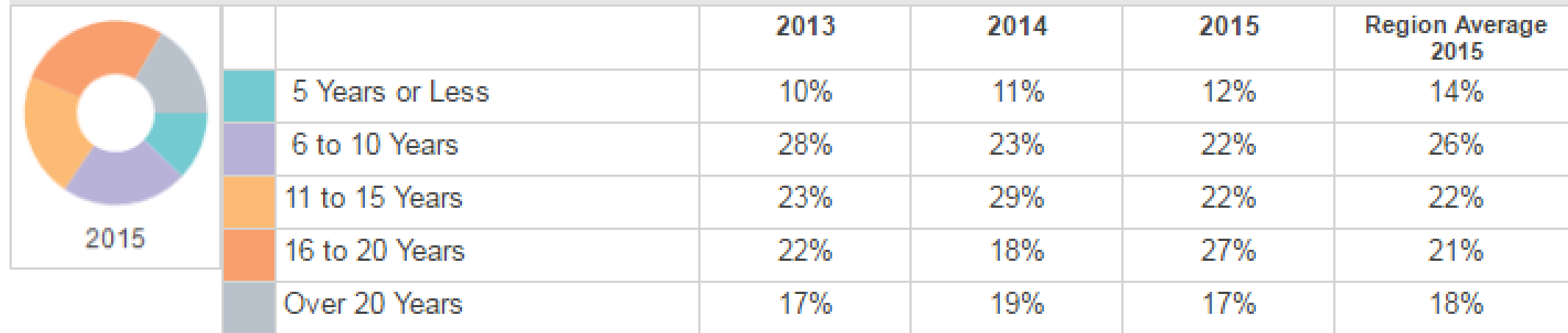
Satisfaction Results	Chapter	Region 6	Difference
Overall Satisfaction Top 2 Aggregate	78 %	74 %	4 %
Overall Satisfaction Mean Score	4.2	4.1	0.1
Likelihood to recommend the Chapter	81 %	73 %	8 %
Likelihood to Renew Chapter Membership	83 %	80 %	3 %
Overall Value of Chapter Membership	71 %	61 %	10 %

Chapter Data	Chapter	Region 6	Difference
Total Number of Chapter Members at Year End	1,319	24,670	N/A
Change in Membership from Previous Year	0 %	2 %	-2 %
New Members Added in Business Year	398	7,395	N/A
Annual Attrition Rate	29 %	28 %	1 %

Survey Response Rate 13%

Member Background

Years in Project Management



Age

	2013	2014	2015	Region Average 2015
24 or Under	0%	0%	0%	0%
25 to 35	7%	8%	8%	10%
36 to 45	18%	20%	21%	25%
46 to 55	36%	39%	41%	35%
56 to 64	27%	26%	24%	25%
Over 64	12%	8%	6%	4%

2015 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

2016 YTD Highlights



- Reinstated Anniversary Pins
- Revitalized Member Job Board
- Piloted PMP Study Group
- Ambassador for ITMPI Premier Webinar Subscription



- Volunteer Round-Up
- Implemented Military Outreach
- Sponsor for Engineering Week Future Cities Competition (Risk)
- Planning for PM training for staff at Center for Transforming Lives



- Still averaging +4 events per month
- Conducted PMP Exam Prep workshop
- Hosted Professional Development Conference
- Partnered with IIL as reseller for Virtual Conference (Agile)

FWPMI Member & Prospect Addresses Mapped into four quadrants centered on downtown Fort Worth, TX



Count of Addresses (based on zip code)

Quadrant	Members	Prospects	Uber Total
NE	646	5,666	6,312
NW	126	1,190	1,316
SE	231	1,727	1,958
SW	131	1,152	1,283
Total	1,134	9,735	10,869

Quadrant % of Chapter Total

Members	Prospects	Uber Total
57%	58%	58%
11%	12%	12%
20%	18%	18%
12%	12%	12%
100%	100%	100%

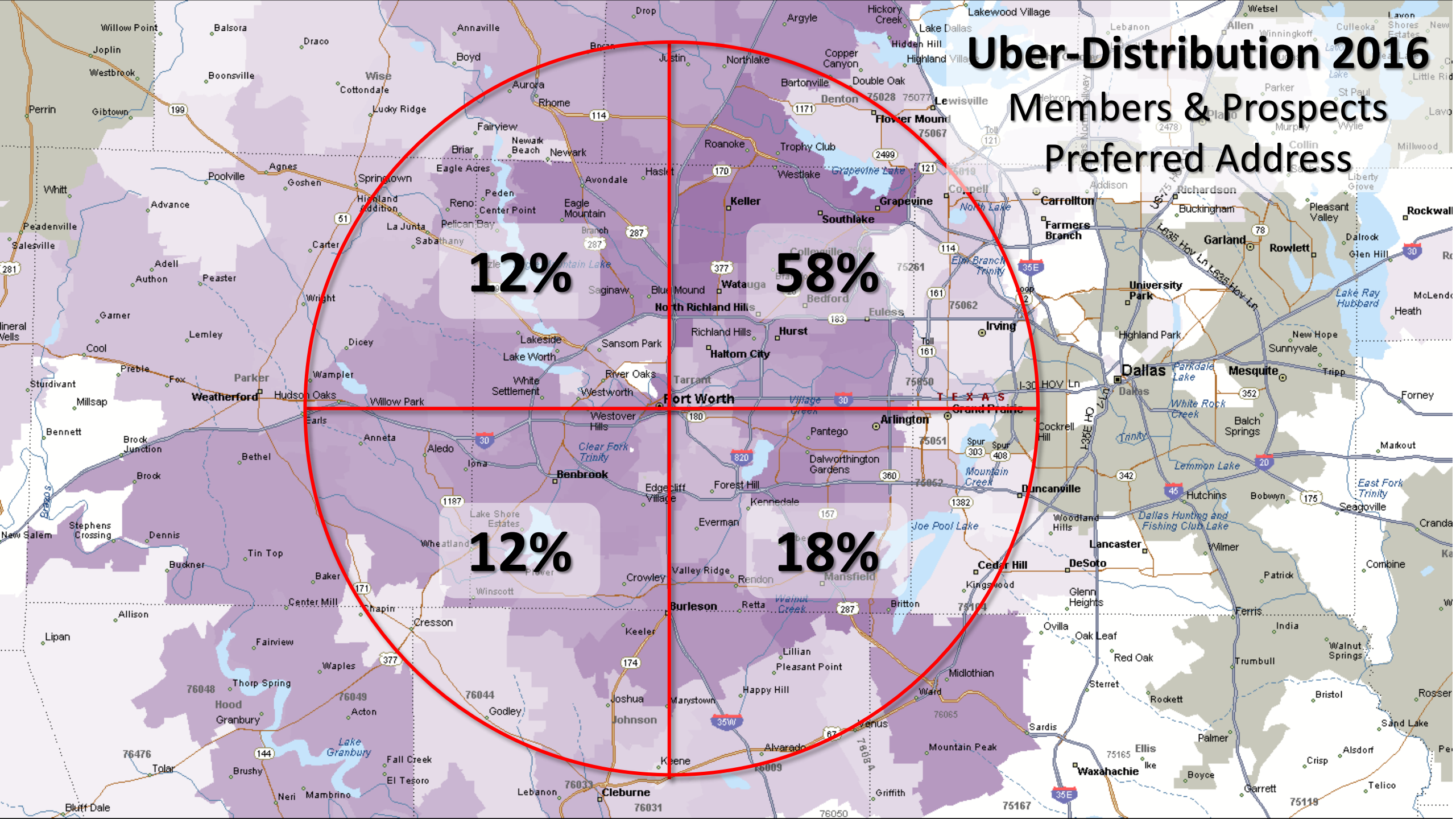
Source: 12Jun2016 DEP and CRS data.

Prospects and Members were mapped independently in order to assess whether there was any significant difference in distribution. The two sets of data yield almost identical results – indicating that current membership is likely not swayed by the location of meetings. Meeting locations convenient to the NE quadrant appear to support the greatest volume of potential attendees.

Uber-Distribution 2016

Members & Prospects

Preferred Address



Annual Financial Report

2015 Income

Lunch Meetings	\$3,830
Dinner Meetings	\$15,197
Workshops	\$24,275
PDD	\$38,333
Membership Dues	\$32,000
Sponsorships	\$2,222
Short-term Investments	\$67
Total	\$115,925

2015 Expenses

Events	\$80,655
Leadership Development	\$17,798
General & Admin	\$3,177
Technology	\$5,946
Outreach	\$2,609
Awards & Recognition	\$701
Professional Services	\$650
Total	\$111,536



Annual Financial Report

2015 Balance Sheet Updates

Cash	
Checking	\$41,536
Savings	\$100,549
Total Cash	\$142,085
Paypal	\$206
Investments	
Receivables	
Fixed Assets	\$73
Total Assets	\$142,364
Total Liabilities	0
Total Equity (Reserves)	\$142,364



Budget Results

Income	\$119,890
Expenses	\$111,407

Items of Significance

Overall income relatively the same as 2014

- Lunch meeting revenue increased 100%
- Dinner meetings revenue decreased 8%
- Workshop revenue increased 26%

Membership dues stayed same

Sponsorship revenue down 70%

General and Admin expenses are only 3% of expenses

Thank you for another successful year!

*The 2016 Annual Report will be available
on the Chapter website.*

www.FWPMI.org

