



Fort Worth Chapter of the Project Management Institute

Annual Business Meeting

June 2017

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
Tresia Eaves
PMP



Past President
Michele Gagne
PMP



Professional Development
Denise Stafford
PMP



External Relations
Cindy Vandersleen
PMP



Internal Relations
Sandy Harris
PMP



Operations
Brad Worley
PMP



Professional Development Leadership Team

4	VP Professional Development	Denise Stafford
3	Director Of Speaker Management	Tony Proctor
2	Speaker Coordinator	{Open}
3	Director Of Event Management	{Open}
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	{Open}
2	REP Coordinator	Kevin Kelley
2	Rolling PowerPoint preso	Kelly Bearman
3	PDC Director (2017)	Threta Davis
2	Social Events	{Open}

VP Professional
Development
Denise Stafford
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	Sunil Gutti
2	Sponsor Program Manager	{Open}
2	Promotional Materials Coordinator	Shelly Long
3	Director Of Outreach	Lynn Robbins
2	RCC Program Manager	Tanja Bell
2	Academic Outreach Manager	Lisa Griggs
2	PMIEF Liaison	Cindy VanderSleen
2	Military Liaison	Ron Prowell
2	Military Liaison	Sharron Frohner
2	Military Liaison	Agnita Jackson
2	Military Liaison	John Koren
2	Community Outreach Manager	{Open}

VP External Relations
Cindy Vandersleen
PMP



Internal Relations Leadership Team

4	VP Internal Relations	Sandy Harris
3	Director Membership	Lance Beaty
2	Job Board Manager	Elva Nyatenya
2	New Member welcome packages	Jan Moye
2	Member Recognition Coordinator	Donna Worley
3	Director Of Volunteer Management	Paula Slevin
2	Volunteer Recruitment Manager	{Open}
2	Volunteer Opportunities Manager	{Open}
3	Director Of Retention	Melissa Arnett
2	New Member Orientation webinar facilitator	{Open}
2	Volunteer Orientation webinar facilitator	{Open}
2	Onboarding specialist	{Open}
3	Director of Mentoring	Trish McManus

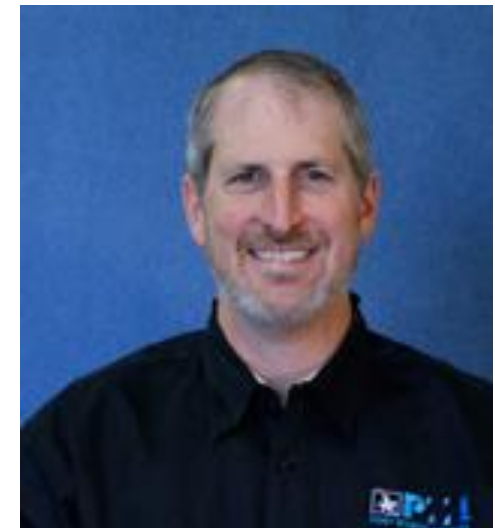
VP Internal Relations
Sandy Harris
PMP



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

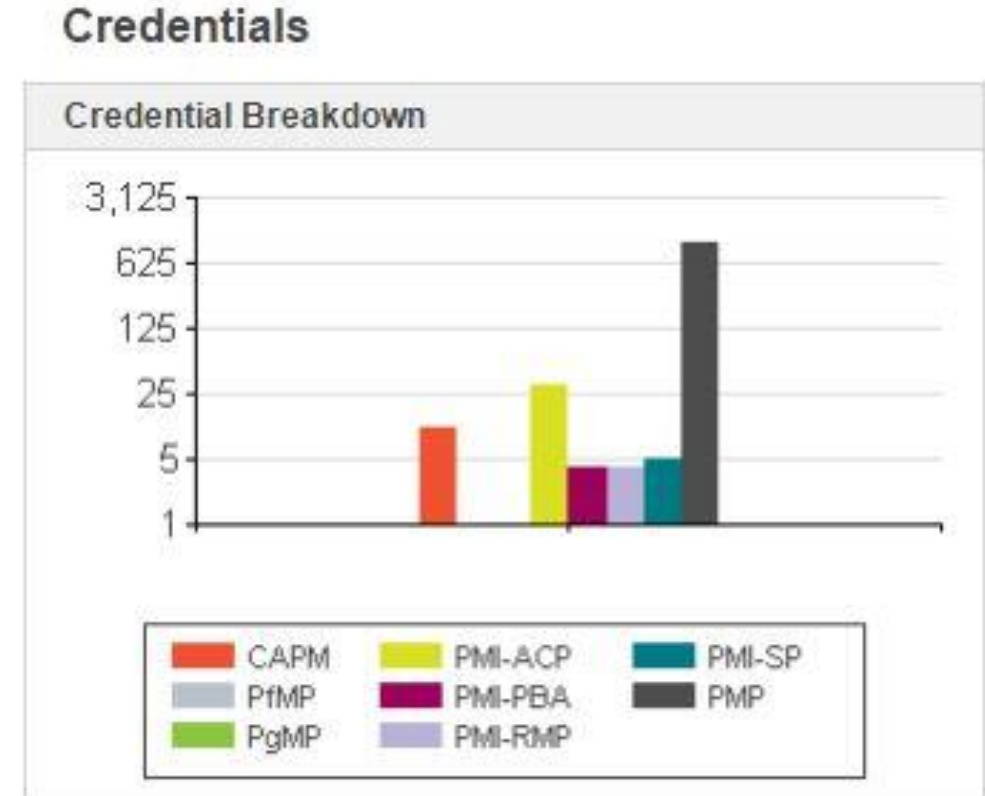


Key Metrics

Membership Count



Membership Credentials



PMI Annual Survey Member Satisfaction

2016 Summary Report

Satisfaction Results	Chapter	Region	Difference	
Overall Satisfaction Top 2 Aggregate	71 %	66 %	5 %	?
Overall Satisfaction Mean Score	4.0	3.9	0.1	?
Likelihood to recommend the Chapter	70 %	64 %	6 %	?
Likelihood to Renew Chapter Membership	75 %	73 %	2 %	?
Overall Value of Chapter Membership	57 %	49 %	8 %	?

Survey Response Rate 15%

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)

2017 YTD Highlights



- Celebrated 25th Anniversary with guest Steve Sawle from PMI @ PDC
- Transferred management of scholarships to PMIEF
- Focused on improving retention by enhancing value and services
- Created new positions for opportunities to engage all volunteers



- Young Professional focus to attract and retain new members
- Social Meetup Events to attract and retain new members
- Implemented Prison Outreach and PM Training Program
- Provided PM training for staff at Center for Transforming Lives



- Maintaining +4 events per month
- Partnerships to offer more options for the PMP Exam Prep workshops
- Hosted Professional Development Conference
- Offering different half-day workshops: Agile, MS Project, Scheduling

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



2017
Update

Count of Mappable Addresses (based on zip code)

Quadrant	Members	Prospects	Uber Total
NE	687	5,273	5,960
NW	145	1,104	1,249
SE	230	1,579	1,809
SW	159	1,062	1,221
Total	1,221	9,018	10,239

Quadrant % of Chapter Total

Members	Prospects	Uber Total
56%	58%	58%
12%	12%	12%
19%	18%	18%
13%	12%	12%
100%	100%	100%

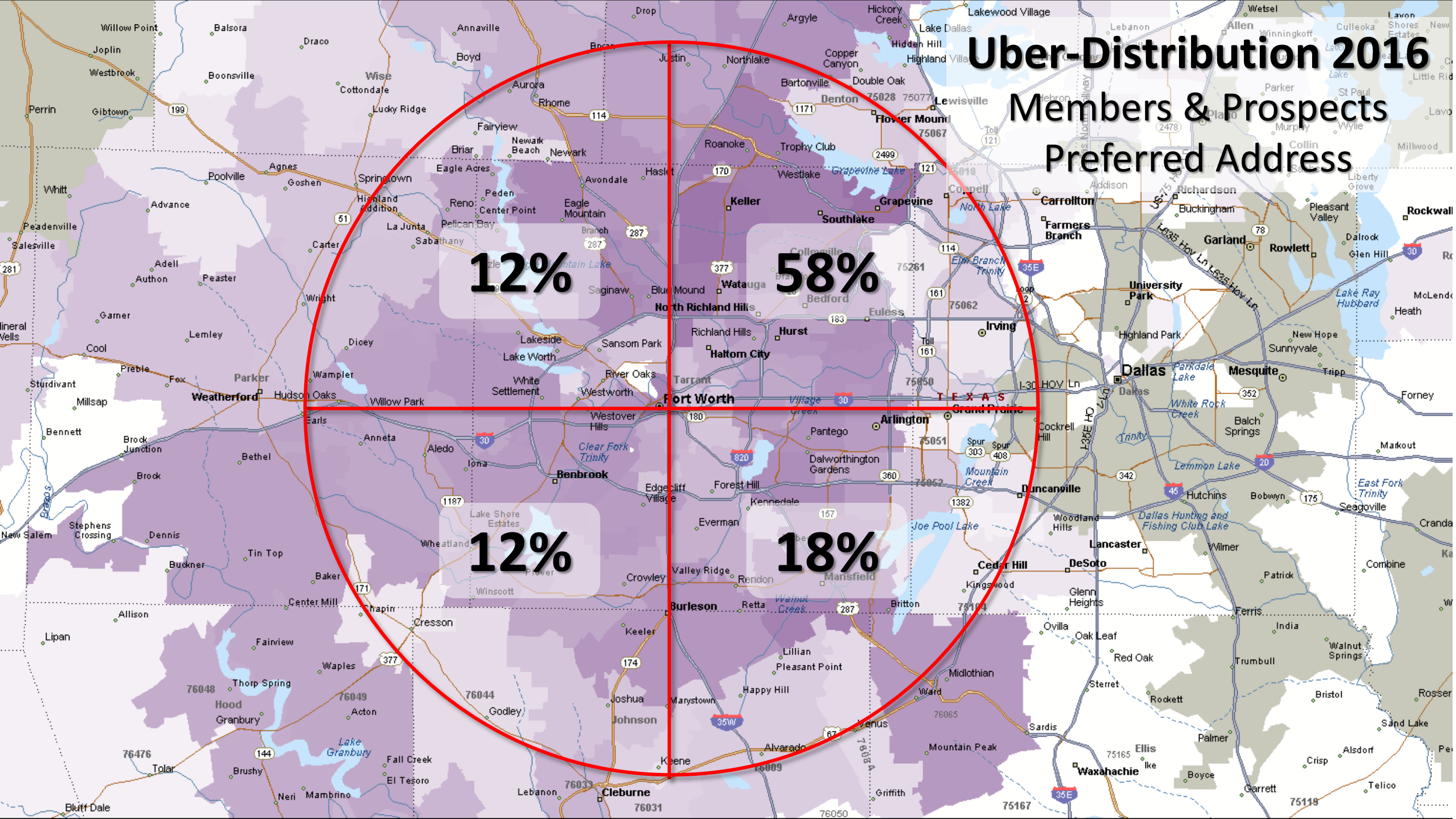
Source: 06May2017 CBOSPro Website data and CRS data.

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 (members and prospects).

Uber-Distribution 2016

Members & Prospects

Preferred Address



Annual Financial Report

2016 Income		2,015	Difference		
Lunch Meetings	2,347	83,830	10	1,483	0.39 2016 - 2 less lunch meetings
Dinner Meetings	14,582	1215,197	12	615	0.04
Workshops	8,322	224,275	3	15,953	0.66 2016 - 1 less workshop (type of workshop affects rev)
PDC	37,331	38,333		1,002	0.03
Membership Dues	34,220	32,000		2,220	0.07 2016 dues were up
Sponsorships	3,460	2,222		1,238	0.56 2016 sponsorship up
Short-term Investments	61	67		6	
Total	100,322	115,924		15,602	workshop revenue major impact



Annual Financial Report

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2016 Balance Sheet Updates

Cash

Checking	52,242	41,536	10,706
Savings	100,610	100,549	61
Total Cash	152,852	142,085	10,767
Paypal	-	-	
Investments	-	-	
Receivables	-	-	
Fixed Assets	73	73	
Total Assets	152,925	142,158	10,767
Total Liabilities	-	-	
Total Equity (Reserves)	152,925	142,158	10,767
Budget Results			
Income	100,322	119,890	19,568
Expenses	99,920	111,407	11,487



Thank you for another successful year!

*The 2017 Annual Report will be available
on the Chapter website.*

www.FWPMI.org

