



# Fort Worth Chapter of the Project Management Institute

Annual Business Meeting

July 2018

# 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  
Andrea Benson  
PMP



# Professional Development Leadership Team

4	<b>VP Professional Development</b>	<b>Denise Stafford</b>
3	<b>Director Of Speaker Management</b>	<b>Tony Proctor</b>
2	Speaker Coordinator	{Open}
3	<b>Director Of Event Management</b>	{Open}
2	Book Club Manager	{Open}
2	<b>Book club (north) coordinator</b>	<b>Bruce Falcon</b>
2	<b>Book club (south) coordinator</b>	<b>Cheryl Medina</b>
3	<b>Director of Education</b>	{Open}
2	<b>Workshop Coordinator</b>	{Open}
2	Webinar Coordinator	{Open}
3	<b>Director of Administration</b>	{Open}
2	<b>REP Coordinator</b>	{Open}
2	<b>Rolling PowerPoint preso</b>	{Open}
3	<b>PDC Director (2018)</b>	<b>Denise Stafford</b>
2	Social Events	{Open}

VP Professional  
Development  
Denise Stafford  
PMP



# External Relations Leadership Team

4	<b>VP External Relations</b>	<b>Cindy VanderSleen</b>
3	Director Of Communications	{Open}
2	<b>E-Newsletter Manager</b>	<b>Steve Tefertiller</b>
2	<b>Website Administrator</b>	<b>Jonathan Chrisawn</b>
2	<b>Manager Of Email Publications</b>	<b>Steve Tefertiller</b>
2	<b>Social Media Manager</b>	<b>Catherine Rosenau-Fryman</b>
3	<b>Director Of Marketing</b>	<b>{Open}</b>
2	Sponsor Program Manager	{Open}
2	Promotional Materials Coordinator	{Open}
3	<b>Director Of Business Outreach</b>	<b>Brad Worley</b>
2	<b>RCC Program Manager</b>	<b>Julie Farmer</b>
2	<b>Academic Outreach Manager</b>	{Open}
2	<b>PMIEF Liaison</b>	<b>Cindy VanderSleen</b>
2	<b>Military Liaison</b>	<b>Ron Prowell</b>
2	<b>Military Liaison</b>	<b>Agnita Jackson</b>
2	<b>Military Liaison</b>	<b>John Koren</b>

**VP External Relations**  
**Cindy Vandersleen**  
**PMP**



**\*\*Special thanks to Paula Slevin who is heading up our volunteer team for the Ronald McDonald House project coming up in October of 2018!**

# Internal Relations Leadership Team

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

**VP Internal Relations**  
**Sandy Harris**  
**PMP**





# Operations Leadership Team



4	VP Operations	Andrea Benson
3	Director of Finance	Brad Worley
2	Vendor Relations Manager	Brad Worley
2	Asset Manager	Brad Worley
2	Event Close-Out Coordinator	Catherine Rosenau - Fryman
2	Business Analytics Manager	Adam Lang
2	PDD Finance Manager	Brad Worley
2	Workshop Finance Manager	Brad Worley
2	Dinner Meeting Finance Manager	Catherine Rosenau - Fryman
2	Lunch Meeting Finance Manager	Gary Gowins
2	Event Analysis	Adam Lang
3	Director of Operations Technology	Lisa Winn
2	Records Management	Lisa Winn
2	System Administrators	Lisa Winn
2	System Administrators	Lisa Winn
2	Email Administrator	{Open}
3	Director of Administration	{Open}
2	Policies and Procedures Manager	{Open}
2	Chapter Secretary	{Open}
2	Chapter Governance and Fraud Protection	{Open}
2	Historian	Dick Walz

VP Operations  
Andrea Benson,  
PMP



# Registered Company Coordinator (RCC) Program

**Program Objective:** To develop stronger relationships with local employers who (as evidenced by their chapter membership) 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

BAE Systems

BNSF

City of Fort Worth

Cook Childrens

CVS Caremark

Fidelity Investments

Lockheed Martin

## **RCC**

App In Progress

Richard Hoggarth

Patricia McManus

Eric Epperson

Brian Lang

Bob Harper

Rachael Cooksey

Alan Fletcher

## **Company**

Nokia

Novartis

PDX Inc.

Sabre Holdings

Sogeti / Capgemini

Tarrant County

Tarrant Regional Water District

## **RCC**

Michael Martinez

Debbie Marth

Julie Farmer

Bonnie Crawford

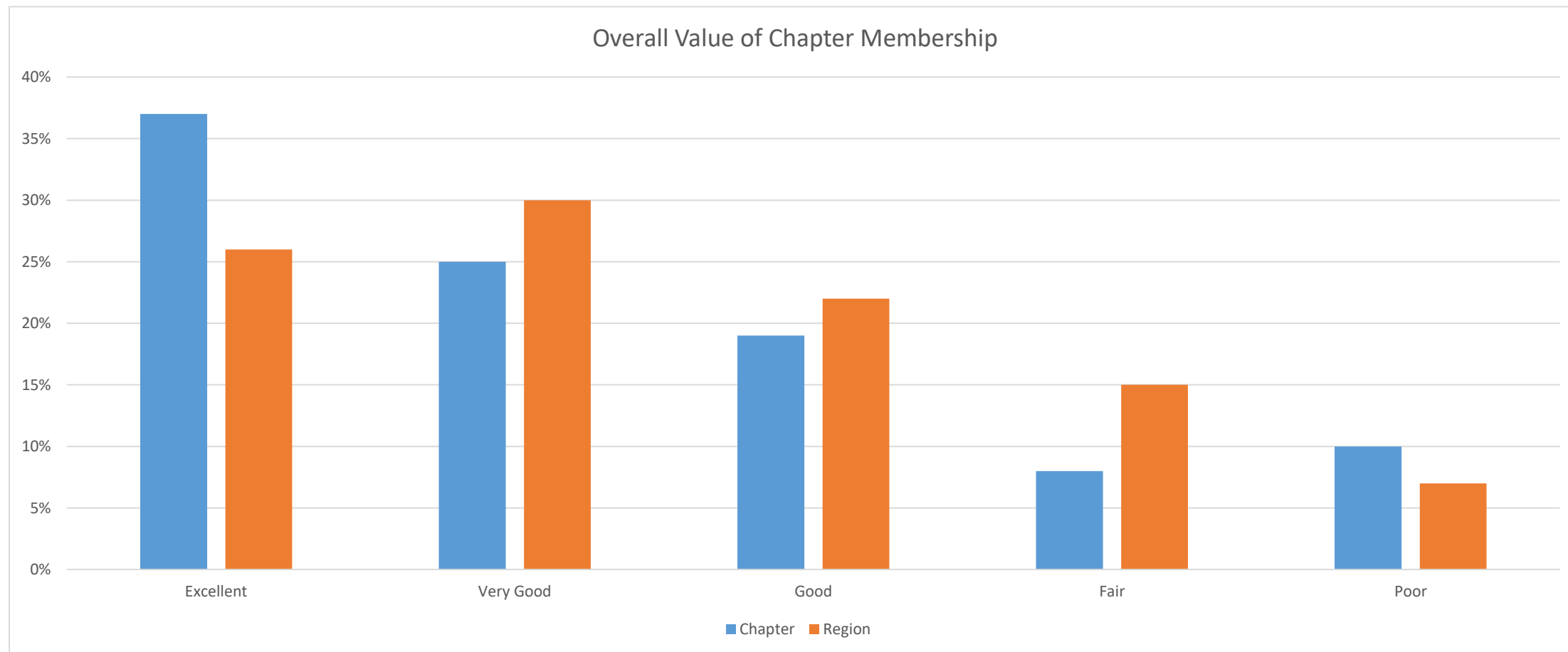
Murali Ramdas

Frances Coffee

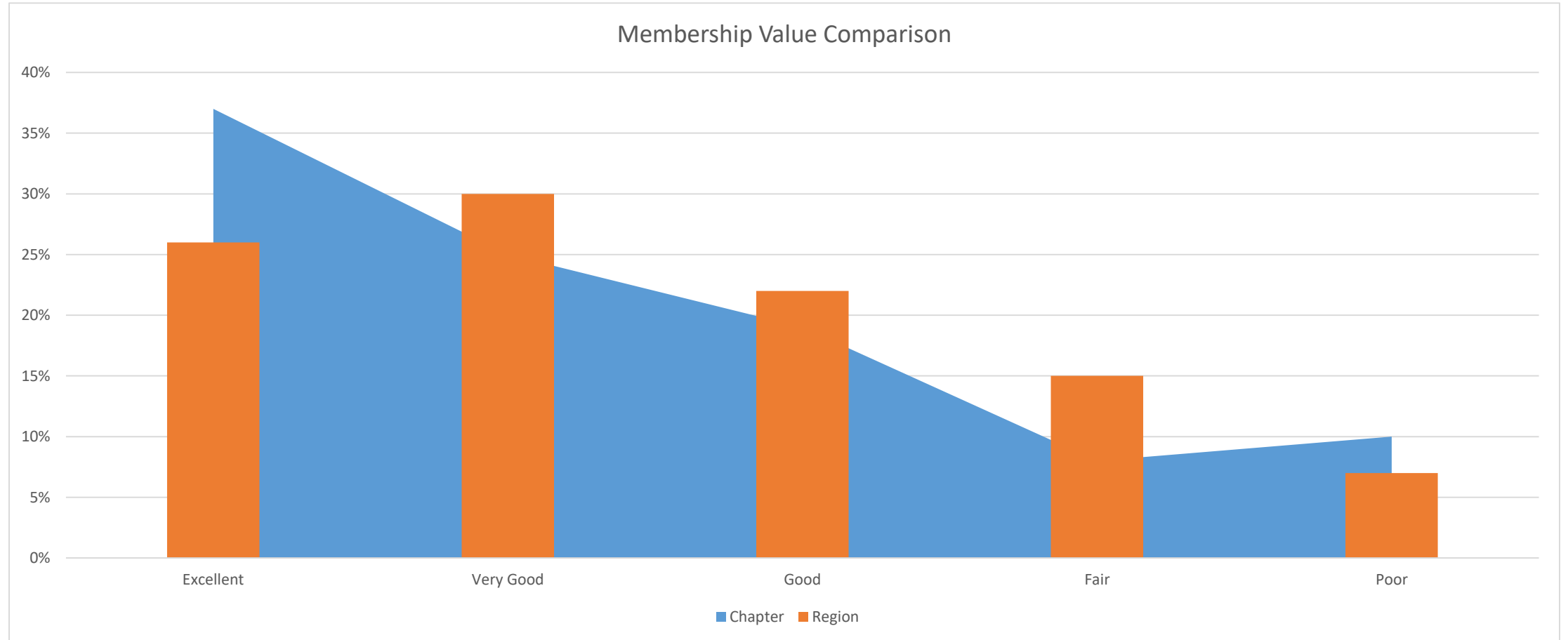
Josh Stark



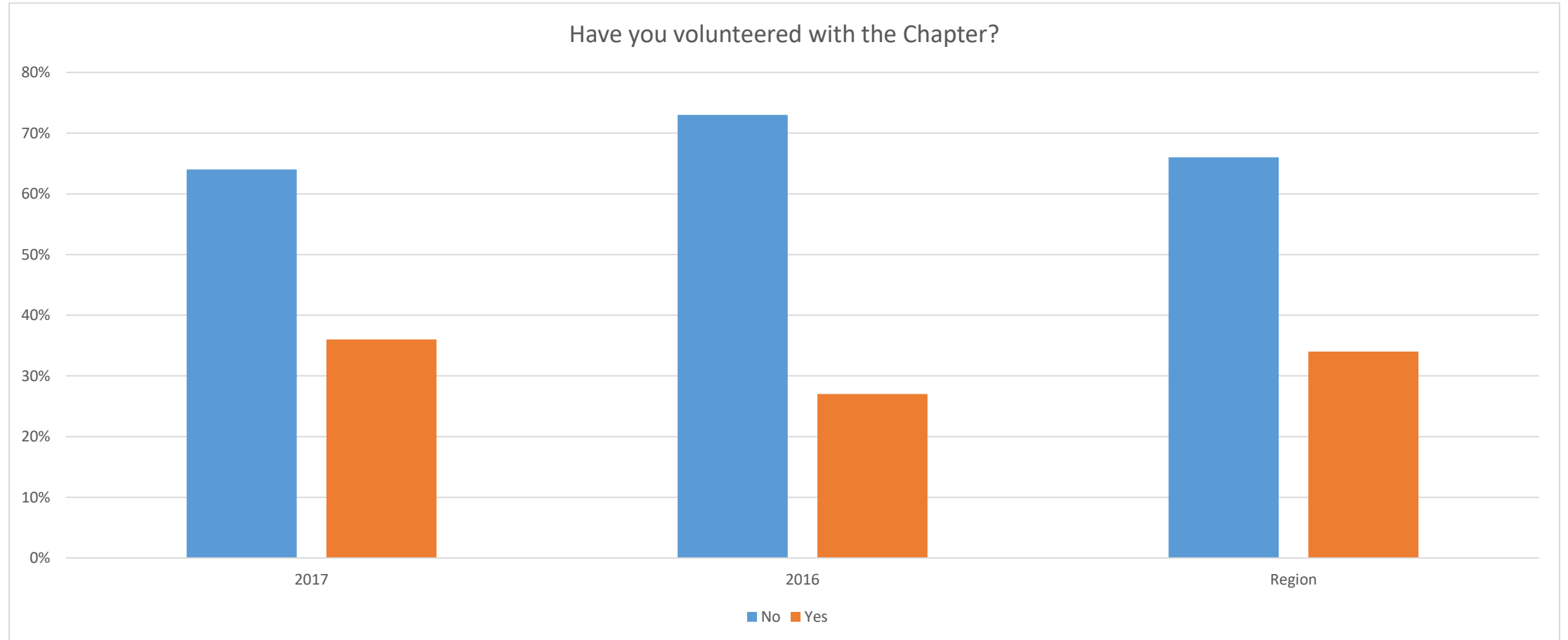
# Member Survey Highlights



# Member Survey Highlights

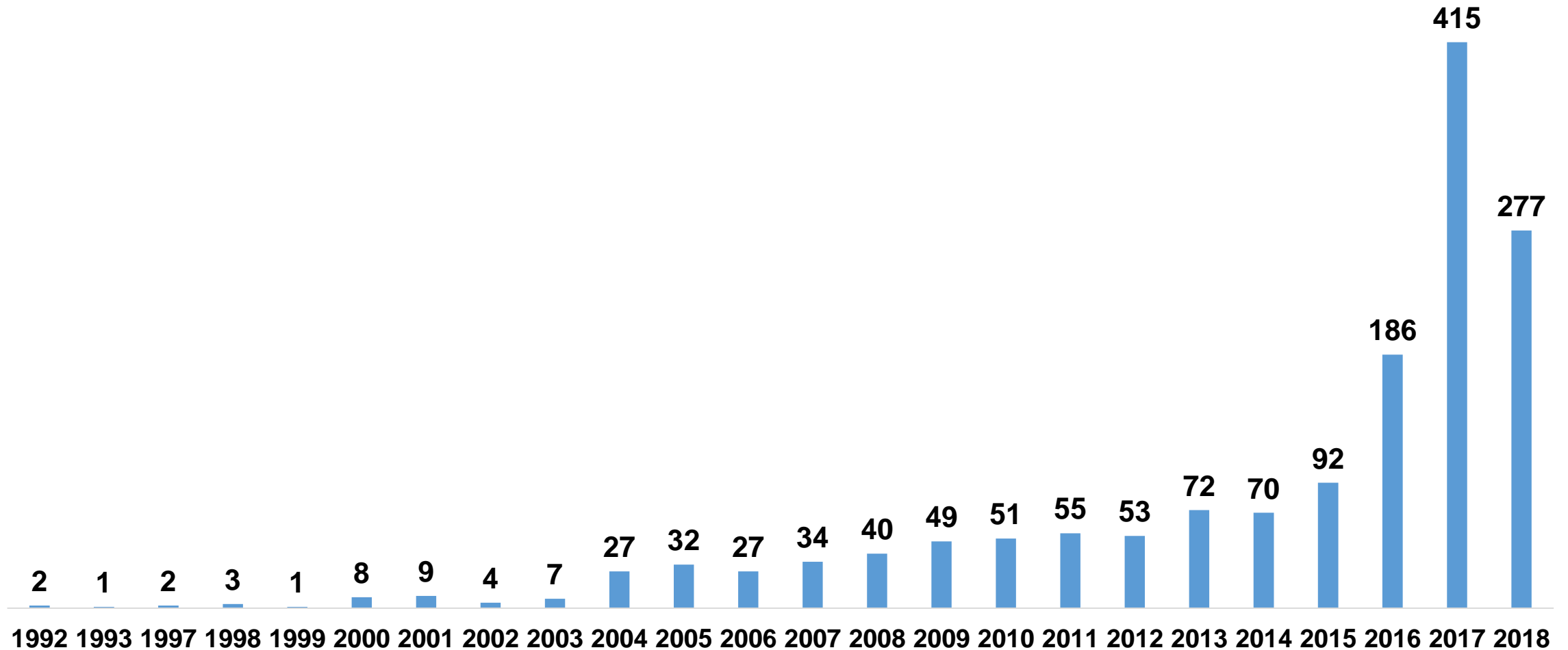


# Member Survey Highlights



# Chapter Growth

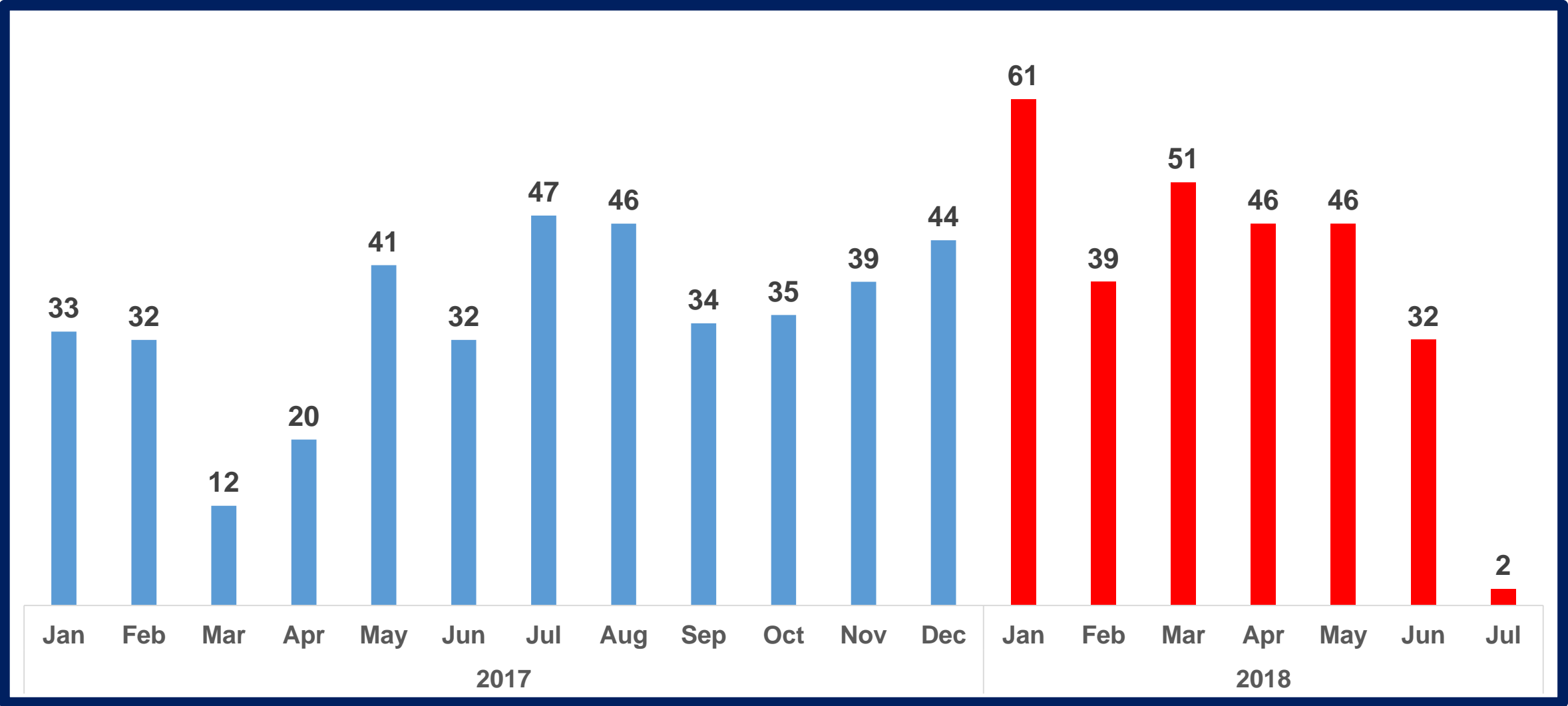
**Current Membership = 1,517**



# New Members – By Month

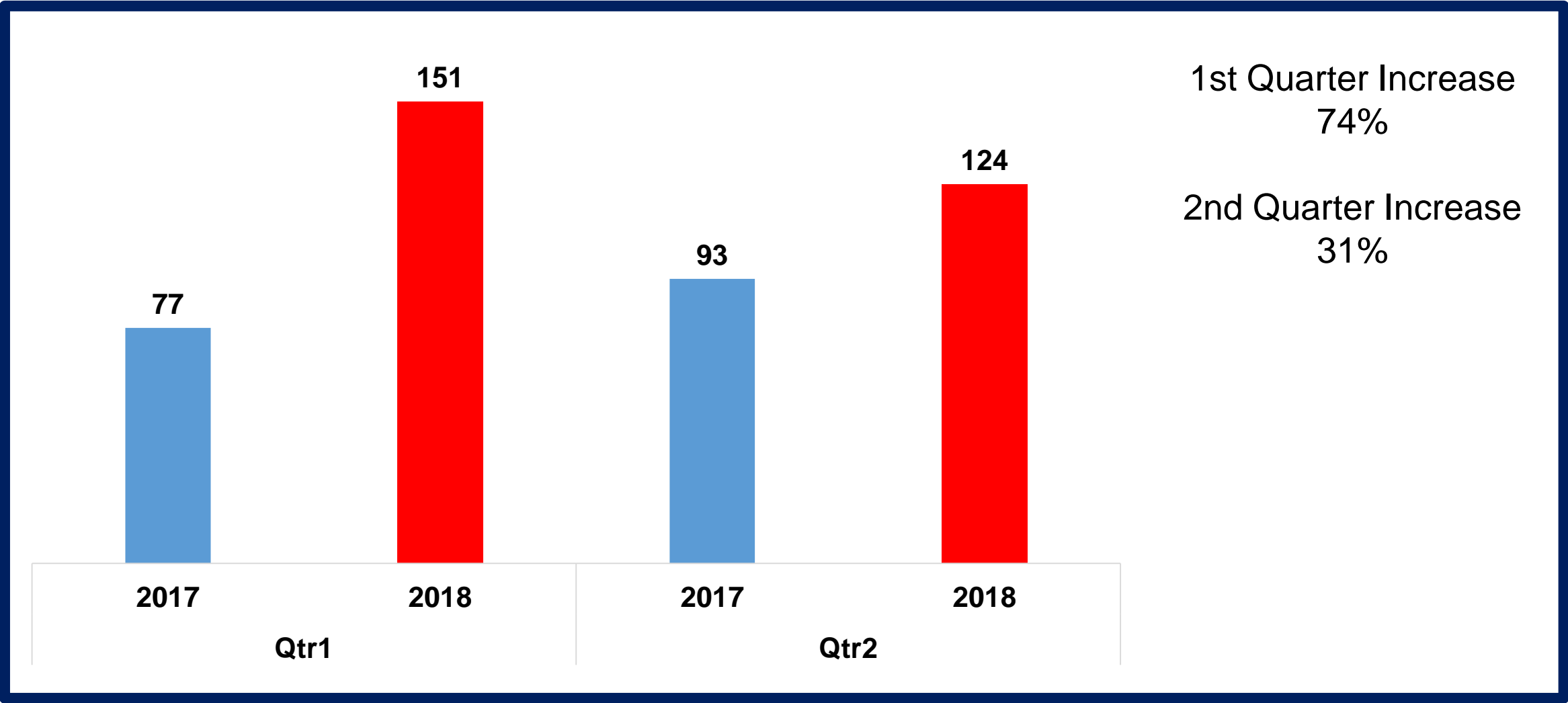
2017 = 415

2018 = 277



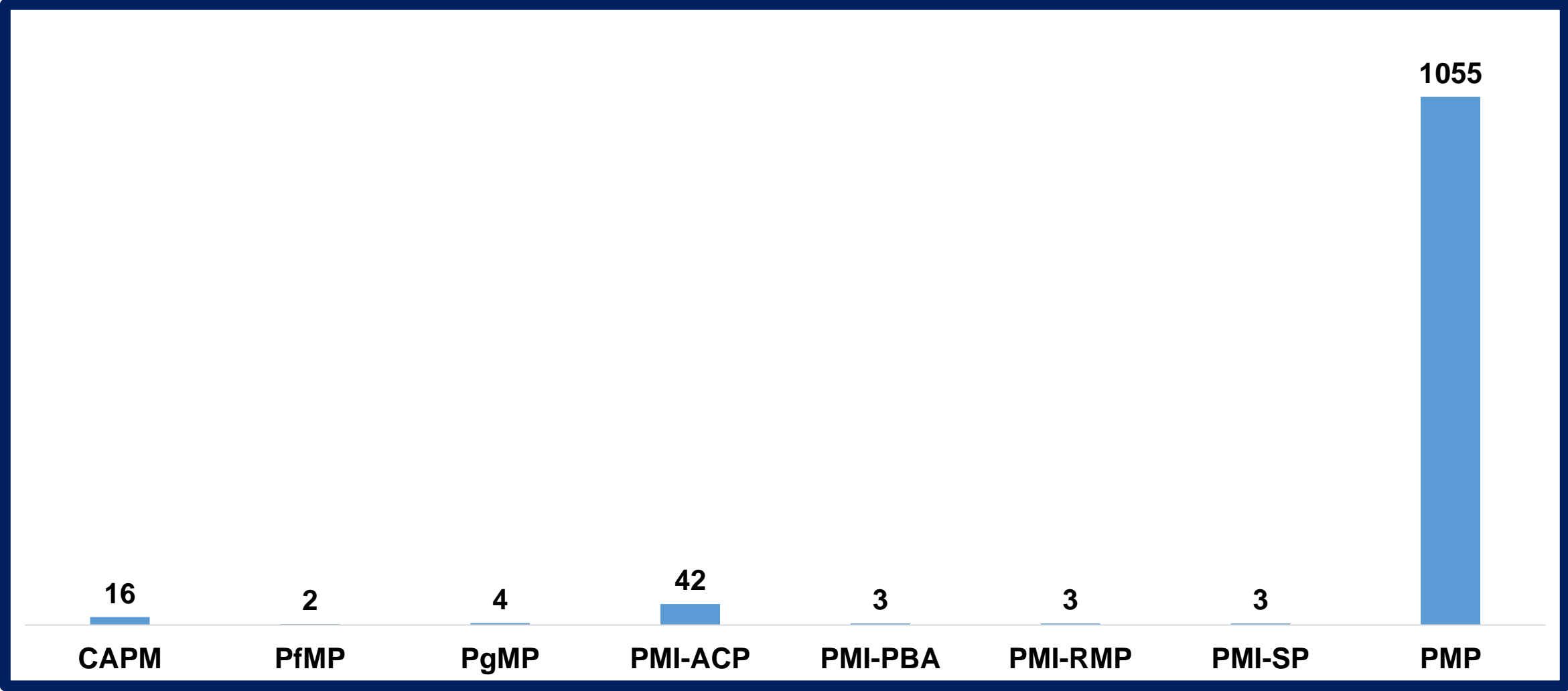
# New Members – By Quarter

New Members 2018 = 277



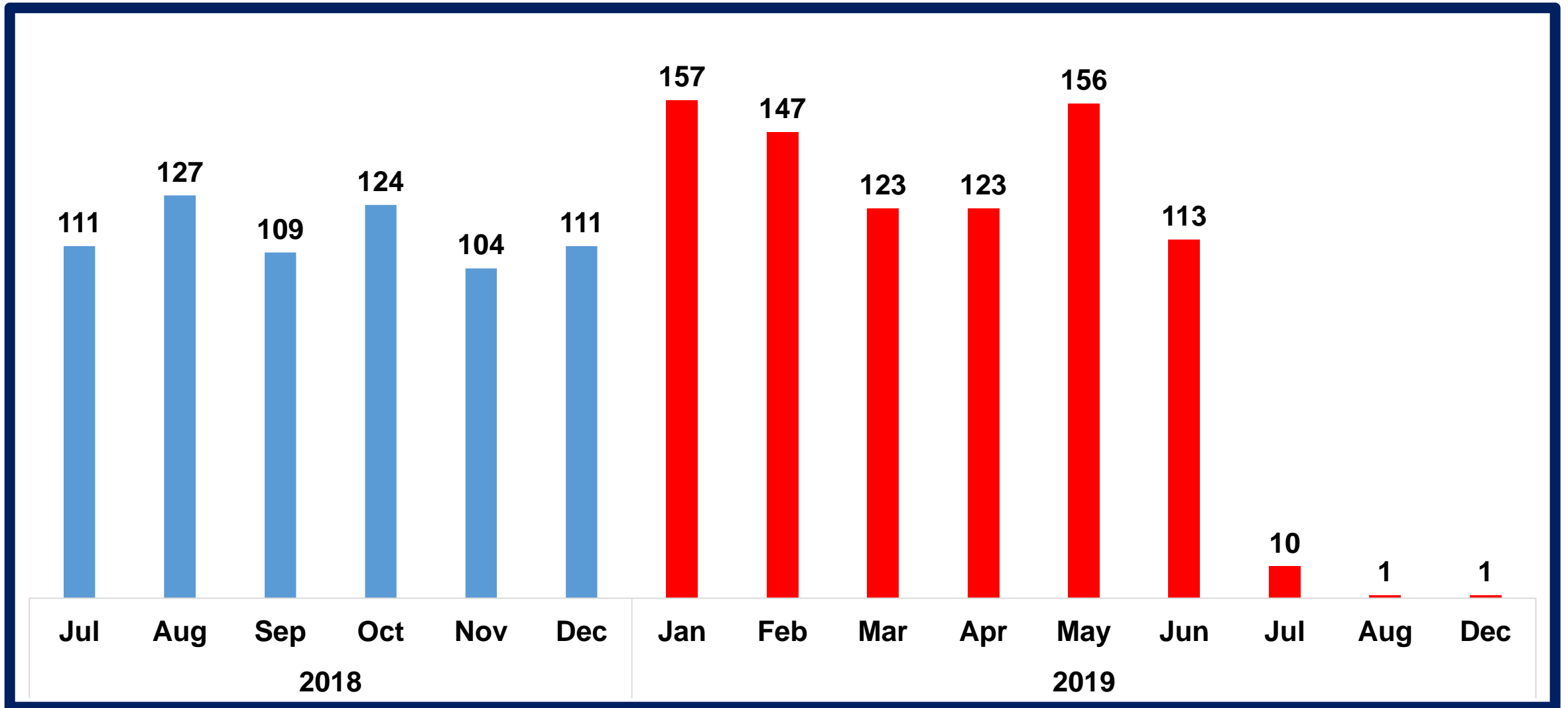
# Credentials

Current Credentials = 1,128

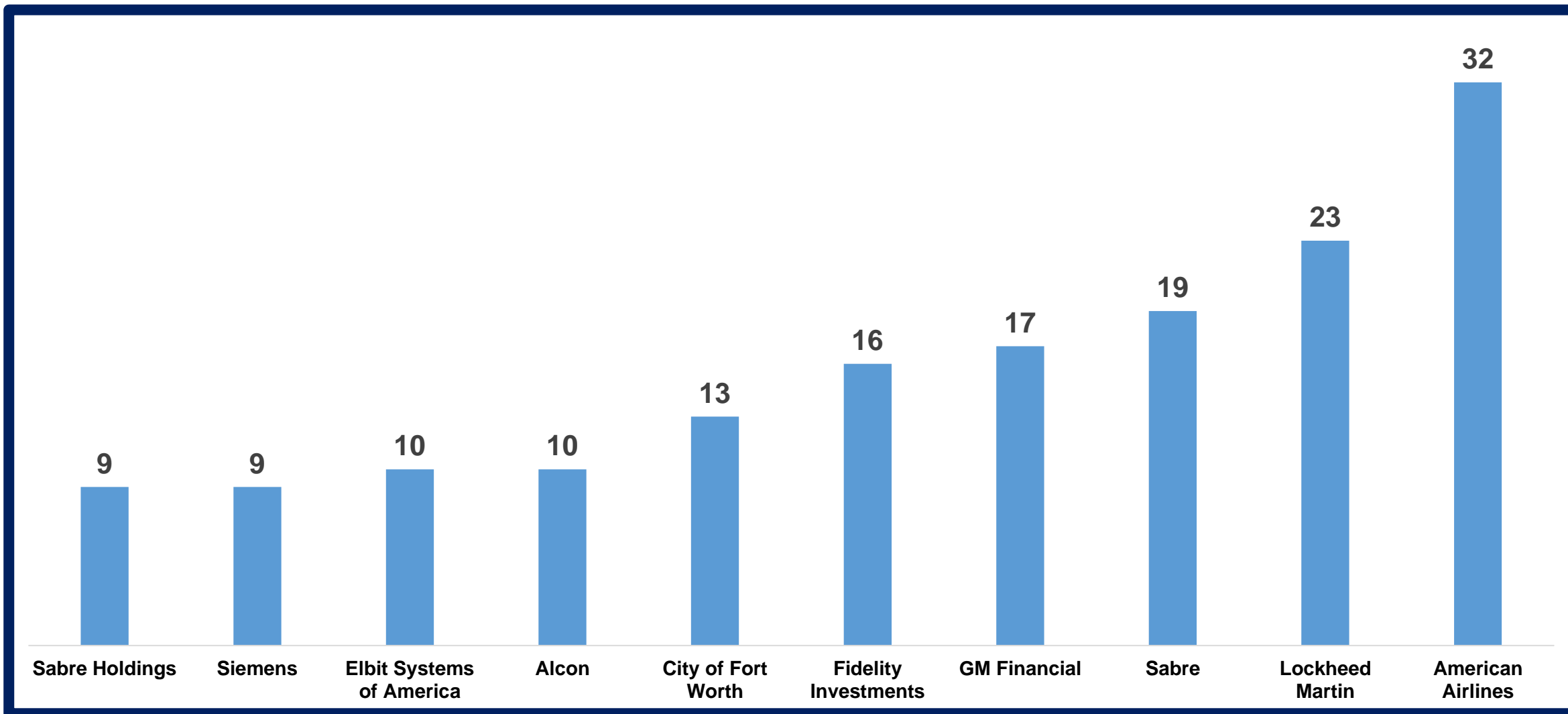




# Membership Expirations / Potential Renewals



# Top 10 Employers



# 2017 YTD Highlights



- Celebrated 25<sup>th</sup> 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 MANY workshops
- Hosted most successful Professional Development Conference to date
- Offering different half-day workshops: Agile, MS Project, Scheduling

# 2018 YTD Highlights



- Membership numbers move chapter to “large category”
- Added more community outreach and social events
- Focused on engaging members with events that appeal -surveys
- Advancing the RCC program with helpful communications



- Ronald McDonald House project; FWPMI to provide dinner in Oct
- Partnership with NPower and Dallas PMI for Military Outreach
- Sponsor for Engineering Week Future Cities Competition (Risk)
- Provided PM training for staff at Center for Transforming Lives



- Still averaging +4 events per month
- Dinner mtgs every other month; lunch meetings w/ new venues
- Continue improving Professional Development Conference
- Team selected to speak at PMI NA LIM on PDC success stories

# Annual Financial Report

2017 Balance Sheet Updates		2016	Difference
Checking	79611	52242	27369
Savings	100670	100610	60
<b>Total Cash</b>	<b>180281</b>	<b>152852</b>	<b>27429</b>
Paypal			
Investments			
Receivables			
Fixed Assets		73	
<b>Total Assets</b>	<b>\$ 180,281</b>	<b>\$ 152,925</b>	<b>\$ 27,356</b>
<b>Total Liabilities</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Total Equity (Reserves)</b>	<b>\$ 180,281</b>	<b>\$ 152,925</b>	<b>\$ 27,356</b>
<b>Budgets Results</b>			
Income	\$ 125,605	\$ 100,322	\$ 25,283
Expenses	\$99,648	\$99,920	\$ (272)



# Annual Financial Report

<u>2017 Income</u>		<u>2016</u>	<u>Difference</u>	<u>Notes</u>
Lunch Meetings	\$ 408	\$ 2,347	\$ (1,939)	
Dinner Meetings	\$ 12,983	\$ 14,582	\$ (1,599)	
Workshops	\$ 27,251	\$ 8,322	\$ 18,929	Partnership with Banyan Group
PDC	\$ 38,572	\$ 37,331	\$ 1,241	
Membership Dues	\$ 37,295	\$ 34,220	\$ 3,075	Auto Renewal Membership dues
Sponsorships	\$ 3,444	\$ 3,460	\$ (16)	
Short-Term Investments	\$ 60	\$ 61	\$ (1)	
Other Income - non PDC	\$ 5,591.00	\$ -	\$ 5,591	Non PDC Income
<b>Total</b>	<b>\$ 125,604</b>	<b>\$ 100,323</b>		





# Thank you for another successful year!

*The 2018 Annual Report will be available  
on the Chapter website.*

*[www.FWPMI.org](http://www.FWPMI.org)*

