



# Fort Worth Chapter of the Project Management Institute

Annual Business Meeting

July 2019

# 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  
Cindy Vandersleen  
PMP



Past President  
Tresia Eaves  
PMP



Professional Development  
Bonnie B. Crawford  
PMP, PMI-ACP, PMI-RMP



External Relations  
Julie Farmer  
PMP



Internal Relations  
Debbie Marth  
PMP



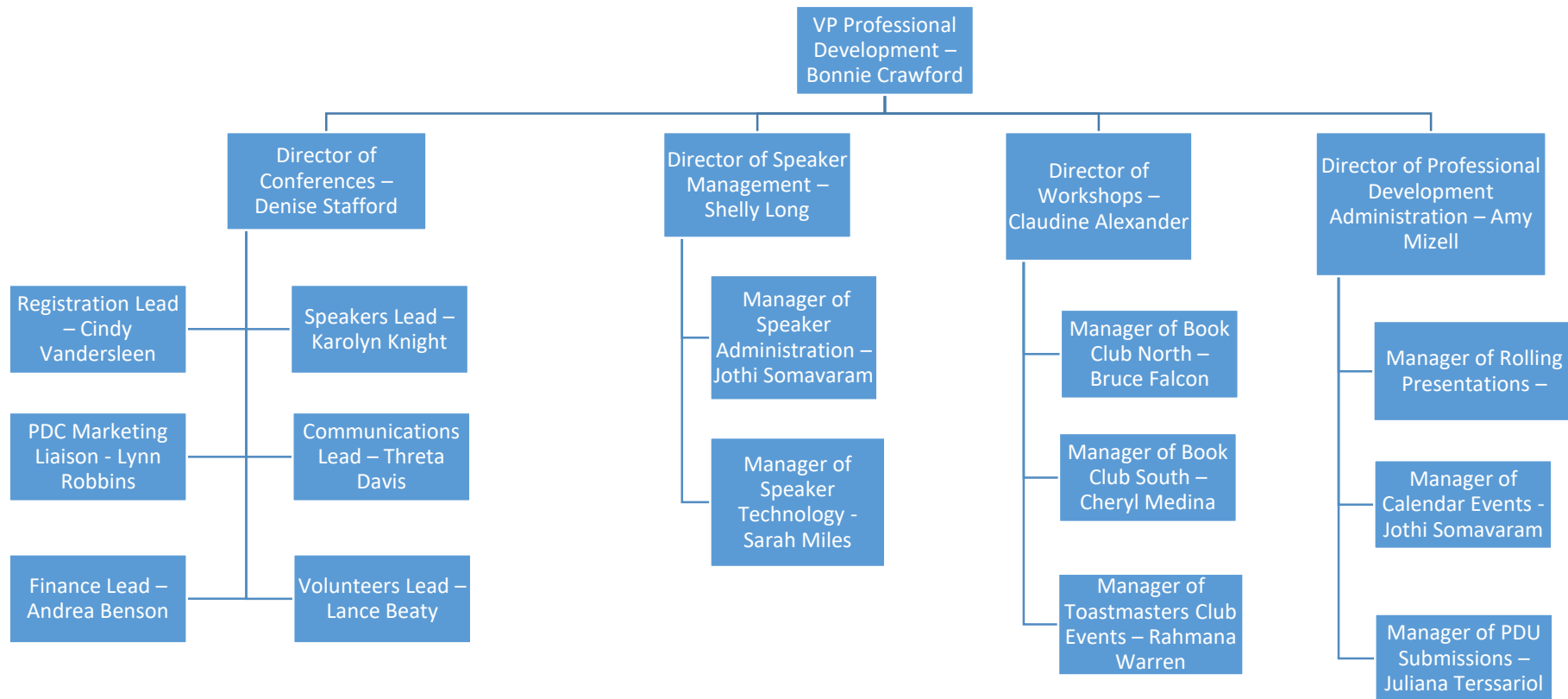
Operations  
Andrea Benson  
PMP





# Professional Development

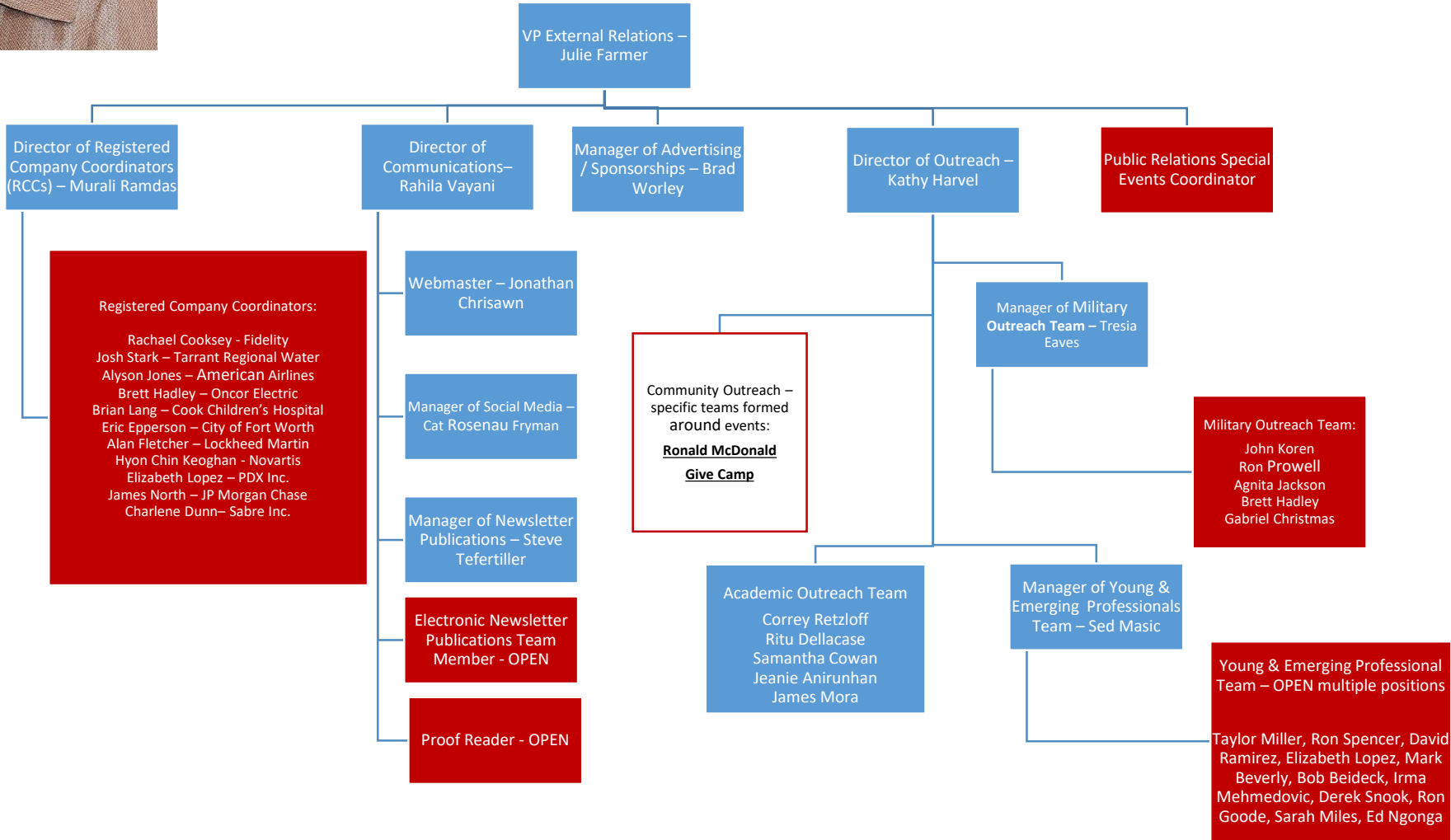
## Bonnie Crawford, PMP, PMI-ACP, PMI-RMP





# External Relations

## Julie Farmer, 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  
City of Fort Worth  
Cook Childrens  
Fidelity Investments  
JP Morgan Chase  
Lockheed Martin

## **RCC**

Alyson Jones  
Eric Epperson  
Brian Lang  
Rachael Cooksey  
James North  
Alan Fletcher

## **Company**

Novartis (Alcon)  
Oncor  
PDX Inc.  
Sabre Inc.  
Sogeti  
Tarrant Regional Water

## **RCC**

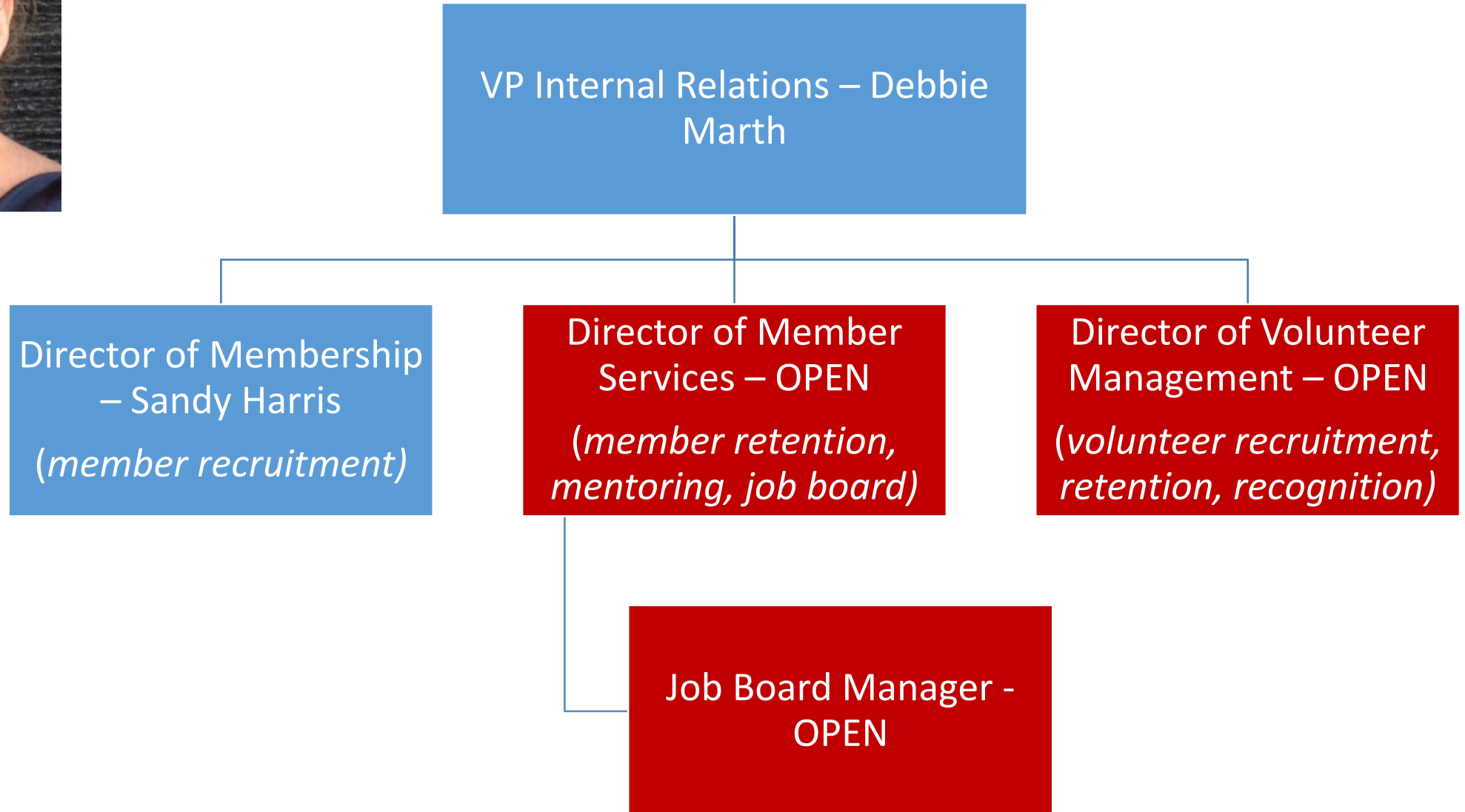
Hyon Chin Keoghan  
Brett Hadley  
Elizabeth Lopez  
Charlene Dunn  
Murali Ramdas  
Josh Stark





# Internal Relations

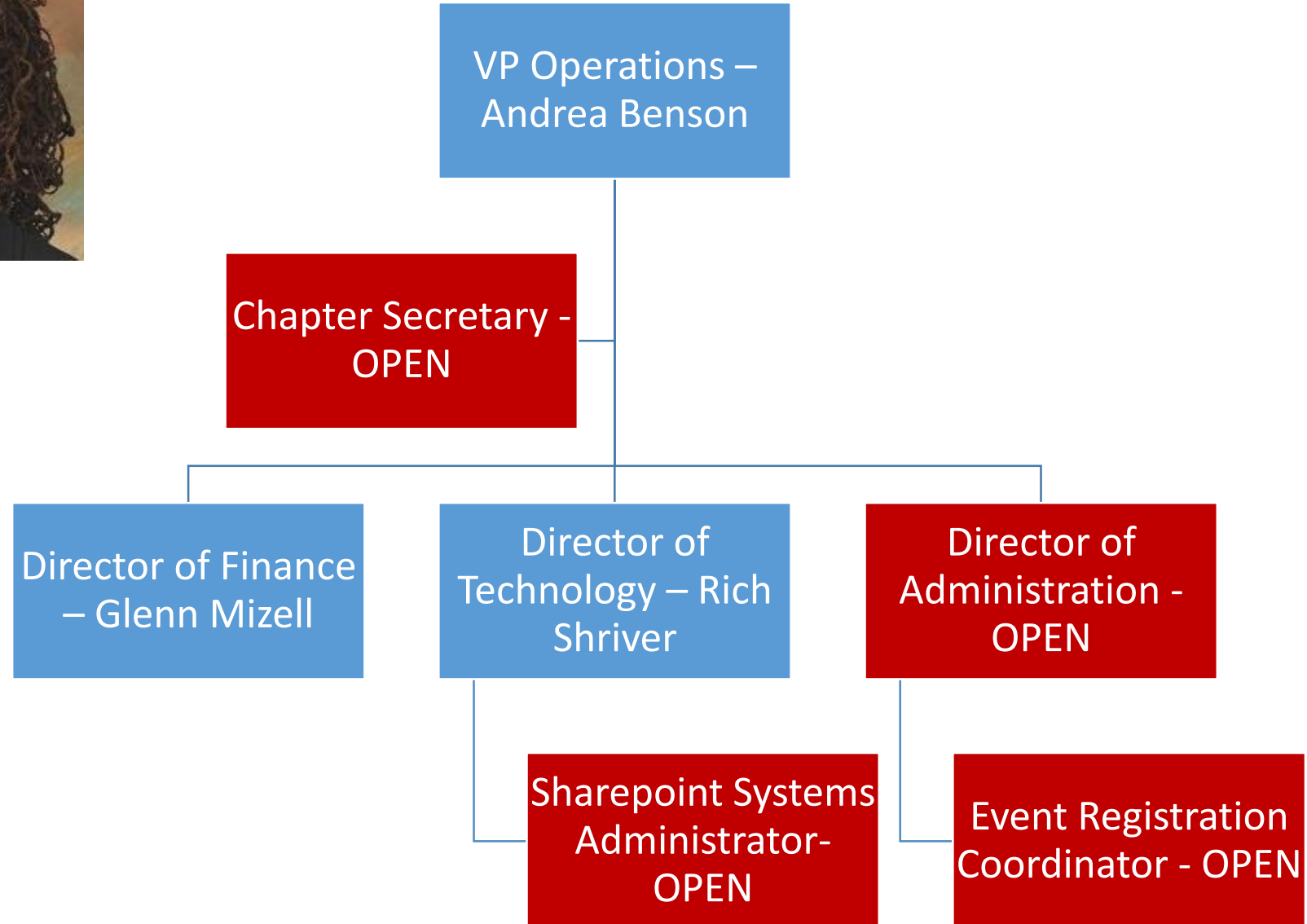
## Debbie Marth, PMP





# Operations

## Andrea Benson, PMP





# Award Winning Chapter

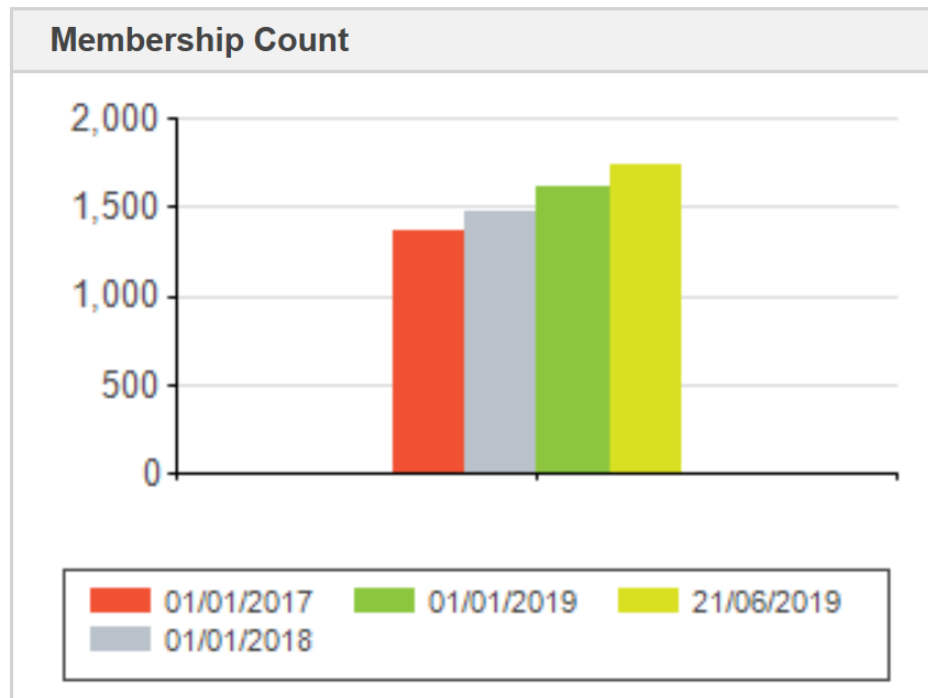
Year	Award
2010	Recognition of Excellence
	Toastmasters Outstanding Officers
2011	Chapter of the Year
2012	Chapter of the Year
	Volunteer Programs
	Leadership, Planning, Operations
2013	Leadership, Planning, Operations
	Chapter Leader of the Year – John Bartkus
2014	Volunteer Programs
2015	Chapter Volunteer of the Year – Brad Worley
2017	PMIEF Community Advancement (Individual) – Tresia Eaves
2018	PMIEF Community Advancement (Chapter)



# Key Metrics

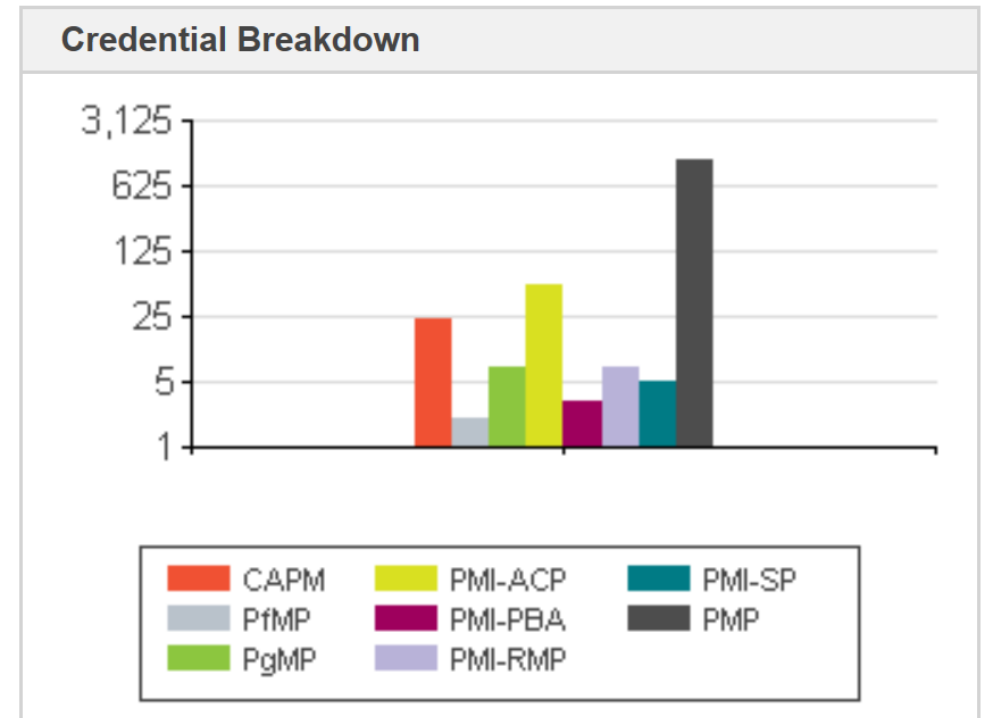
## Membership Count

### Membership



## Membership Credentials

### Credentials

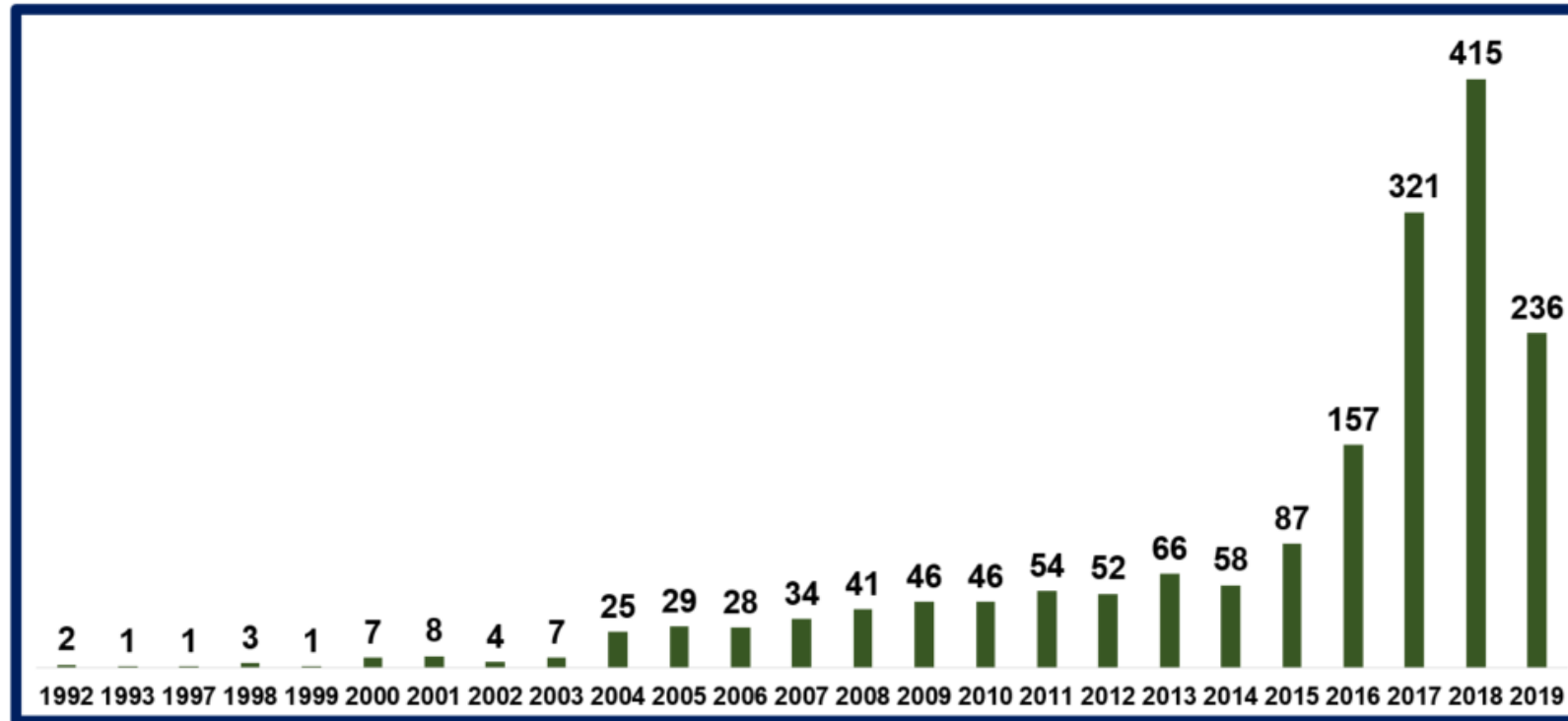


# Key Metrics

## Chapter Growth (To Date)

Chapter Growth – as of **06/13/19**

**Current Membership = 1,729**



# PMI Annual Survey Member Satisfaction



## 2018 Summary Report

Satisfaction Results	Chapter	Region	Difference	
Overall Satisfaction Top 2 Aggregate	74 %	68 %	6 %	?
Overall Satisfaction Mean Score	4.0	3.9	0.2	?
Likelihood to recommend the Chapter	78 %	72 %	6 %	?
Likelihood to Renew Chapter Membership	77 %	75 %	2 %	?
Overall Value of Chapter Membership	63 %	55 %	8 %	?

Survey Response Rate 7%

# 2018 Highlights



- Volunteer positions posted in VRMS on PMI website
- Annual Career night fair
- Speed Mentoring
- New Member Packets



- Taught PM for Prison Entrepreneurship Program
- Prepared Meal for Ronald McDonald House Families
- Sponsor for Engineering Week Future Cities Competition (Risk)
- Conducted PM training for staff at Boys & Girls Club



- Implemented Meetup group and hosted casual social events
- Offered 8 PMP and ACP exam preps through vendor partners
- Hosted Professional Development Conference
- Conducted Peer Mentoring Meetup

# 2019 YTD Highlights



- Revamped new member and volunteer virtual orientation webinars
- Implemented Volunteer of the quarter
- Created new positions for opportunities to engage all volunteers
- Ongoing communication of volunteer opportunities

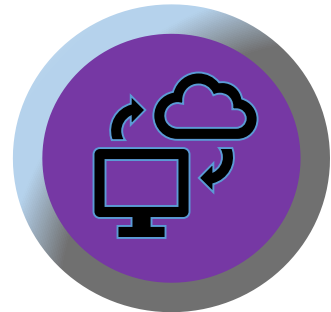


- Repeated Ronald McDonald House outreach event
- Re-focused YP to Young and Emerging Professionals
- Introduced Give Camp event – joint event with Dallas Chapter (Sept)
- Sponsor for Engineering Week Future Cities Competition (Risk)

# 2019 YTD Highlights (Cont.)



- Acquired new venue for and resumed monthly dinner meetings
- Offering virtual attendance at dinner meetings
- Hosted profitable Professional Development Conference; reporting PDUs for attendees
- Offering virtual lunch & learn sessions



- Implemented better financial reserves return on investments
- Implemented credit card onsite payment system
- Implemented new website platform



- Reformatted e-newsletter for easier readability
- Restructured website pages and refreshed content



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



2018  
Update

*Count of Mappable Addresses (based on zip code)*

Quadrant	Members	Prospects	Uber Total
NE	684	5,303	5,987
NW	144	1,043	1,187
SE	228	1,494	1,722
SW	158	1,044	1,202
<b>Total</b>	<b>1,214</b>	<b>8,884</b>	<b>10,098</b>

*Quadrant % of Chapter Total*

Members	Prospects	Uber Total
56%	60%	<b>59%</b>
12%	12%	<b>12%</b>
19%	17%	<b>17%</b>
13%	12%	<b>12%</b>
<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: 25Oct2018 CBOSPro Website data and CRS data.  
Based on a 50 mile radius from Downtown Fort Worth.



# Uber-Distribution 2018

## Members & Prospects Preferred Address

12%

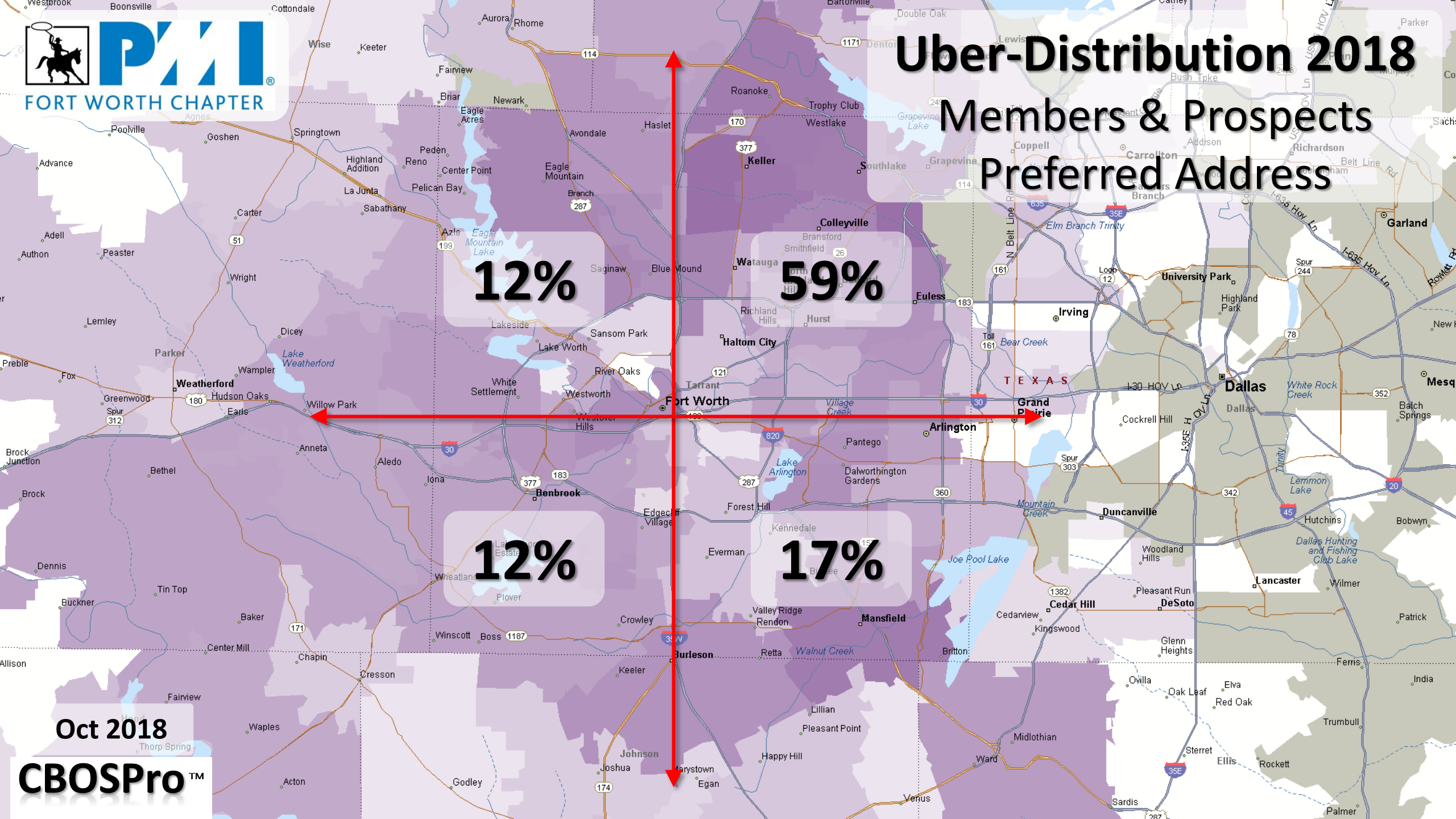
59%

12%

17%

Oct 2018

CBOSPro™





# Annual Financial Report (2018)

	Total	General / Administrative	Professional Development Conference	Dinner Meetings	Lunch Meetings	Workshops	2017
Registrations	\$ 62,933	\$ -	\$ 41,859	\$ 13,546	\$ 564	\$ 6,964	\$ 82,657
Membership Dues	\$ 40,830	\$ 40,830	\$ -	\$ -	\$ -	\$ -	\$ 37,295
Other Income	\$ 782	\$ 782	\$ -	\$ -	\$ -	\$ -	\$ 5,652
Total Income	\$ 104,545	\$ 41,612	\$ 41,859	\$ 13,546	\$ 564	\$ 6,964	\$ 125,604
Events	\$ 55,443	\$ -	\$ 35,606	\$ 13,373	\$ 864	\$ 5,600	\$ 67,285
Outreach	\$ 2,720	\$ 2,720	\$ -	\$ -	\$ -	\$ -	\$ 2,540
Volunteer Leadership Development	\$ 22,248	\$ 22,248	\$ -	\$ -	\$ -	\$ -	\$ 19,466
Administrative	\$ 6,419	\$ 6,419	\$ -	\$ -	\$ -	\$ -	\$ 10,127
Other	\$ 719	\$ 719	\$ -	\$ -	\$ -	\$ -	\$ 230
Total Expense	\$ 87,549	\$ 32,106	\$ 35,606	\$ 13,373	\$ 864	\$ 5,600	\$ 99,648
Income / (Loss)	\$ 16,996	\$ 9,506	\$ 6,253	\$ 173	\$ (300)	\$ 1,364	\$ 25,956



# Annual Financial Report (2018) - Cont.

Cash in Bank (Dec 2018)	
Checking	\$ 95,186.01
Savings	100,730.57
PayPal	1.322.22
Total	\$ 197,238.80

## Items of Significance (2018 compared to 2017)

### Revenue

Total Revenue **decreased** by \$ 21,060  
 Dinner Meetings increased by \$ 563  
 Lunch Meetings increased by \$ 156  
 Professional Development Conference **decreased** by \$ 427 (4%)  
 Workshops **decreased** by \$ 20,287 (96%)  
 Other income **decreased** by \$ 4,870  
 Membership Dues increased by \$ 3,535

### Expense

Events - 63% of all expense for 2018 (2017 – 68%)  
 Administrative – 8% of all expense for 2018 (2017 - 10%)  
 Volunteer Leadership Development – 25% of all expense for 2018 (2017 – 20%)

Actual vs. Budget - 2018		
	Budget	Actual
Income	\$ 103,458	\$ 104,545
Expense	\$ 97,698	\$ 87,549
Net	\$ 5,760	\$ 16,996





# Annual Financial Report (2019 through June 30)

	Total	General / Administrative	Professional Development Conference	Dinner Meetings	Workshops
Registrations	\$ 58,534	\$ -	\$ 49,057	\$ 7,029	\$ 2,448
Membership Dues	\$ 23,975	\$ 23,975	\$ -	\$ -	\$ -
Other Income	\$ 9,436	\$ 821	\$ 7,400	\$ 1,215	\$ -
Total Income	\$ 91,945	\$ 24,796	\$ 56,457	\$ 8,244	\$ 2,448
Events	\$ 35,323	\$ -	\$ 26,507	\$ 8,974	\$ (158)
Outreach	\$ 2,260	\$ 2,260	\$ -	\$ -	\$ -
Volunteer Leadership Development	\$ 2,176	\$ 2,176	\$ -	\$ -	\$ -
Administrative	\$ 8,355	\$ 8,335	\$ -	\$ -	\$ -
Other	\$ -	\$ -	\$ -	\$ -	\$ -
Planned Expenses ★	\$ 10,048	\$ -	\$ 10,048	\$ -	\$ -
Total Expense	\$ 58,162	\$ 12,791	\$ 36,555	\$ 8,974	\$ (158)
Income / (Loss)	\$ 33,783	\$ 12,005	\$ 19,902	\$ (730)	\$ 2,606

★ Planned Expenses for PDC include the initial facility deposit for 2020 PDC event

# Thank you for another successful year!

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

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

