



# **A Year in Review 2013-2014**

## **June 2014 Annual Business Meeting**

# 2013 Highlights

**2**

**PMI Awards**  
Leadership, Planning  
& Operations  
Leader of the Year

**4.92**

Average number of  
events each month

**6,357**

E-newsletter  
subscribers

**1,300**

Sustained average number of members  
(Large chapter status)



# Enhancing Value Through **Awareness**



# Awareness

*Promote the value of project management to practitioners and organizations.*

- Registered Company Coordinator (RCC) program
- Outreach teams to Academia & Community
- Sharing project management stories from local community at chapter meetings



# Enhancing Value Through Collaboration & Partnerships



# Collaboration

*Provide opportunities for sharing and networking.*

- Work with other Chapters to **share best practices**, speakers and knowledge
- Host annual Professional Development Day and bring together **professional enablers**
- Offer a variety of events and types of events to **promote member engagement**



# Enhancing Value Through Education



# Education

*Provide high quality, great value workshops to obtain & maintain certifications.*

- Workshops to **develop** soft and technical project management **skills**
- PMP and CAPM **Certification Prep** courses
- Total of **89 PDUs** available through chapter events





# Enhancing Value Through Volunteers



# Volunteers

*Foster an environment that encourages volunteer engagement and provides opportunities for leadership development.*

- Developed a **4 level** Volunteer Management Model
- Identify roles and projects **opportunities**
- Define **responsibilities** and **rewards** for each level
- **Leadership development** opportunities including Regional and Global events

# Volunteer Management

97%

Of those expressing interest in volunteering made a volunteer commitment

4.3

Overall satisfaction with volunteer experience (5.0 scale)

100+

Number of volunteers in 2013

\$375,000

Estimated dollar value of volunteer hours to support Chapter operations and events



# 2013 Board of Directors

## Elected Officers

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Nikki Choyce	President
John Bartkus	Past President
Sandy Harris	VP Professional Development
Victor Mercado	VP Operations
Cindy VanderSleen	VP External Relations
Lance Beaty	VP Internal Relations



# 2014 Board of Directors

## Elected Officers

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Nikki Choyce	President
John Bartkus	Past President
Rashidi Benson*	VP Professional Development
Brad Worley*	VP Operations
Michele Gagne	VP External Relations
Lorraine Leonard*	VP Internal Relations

*\* Appointed to fill the remainder of term (due to resignations)*



# Leadership Teams

## Michele Gagne

Communications team

Marketing team

Outreach team

## VP External Relations

Glenda Cheatham, Director

Luis da Silva, Director

Glenna Wheatley, Director

## Lorraine Leonard

Membership team

Volunteer Management team

Member Services team

## VP Internal Relations

Lance Beaty

[open]

Lynn Robbins



# Leadership Teams

## Brad Worley

## VP Operations

Finance team

[open] Director

Registration Management team

Lisa Gray, Manager

Governance team

[open]

## Rashidi Benson

## VP Professional Development

Speaker Management

Tony Proctor, Director

Event Management

Patsy Haines, Director

Education team

Garrett McDaniel, Director

Administration

[open], Director

PDD team

[open], Director

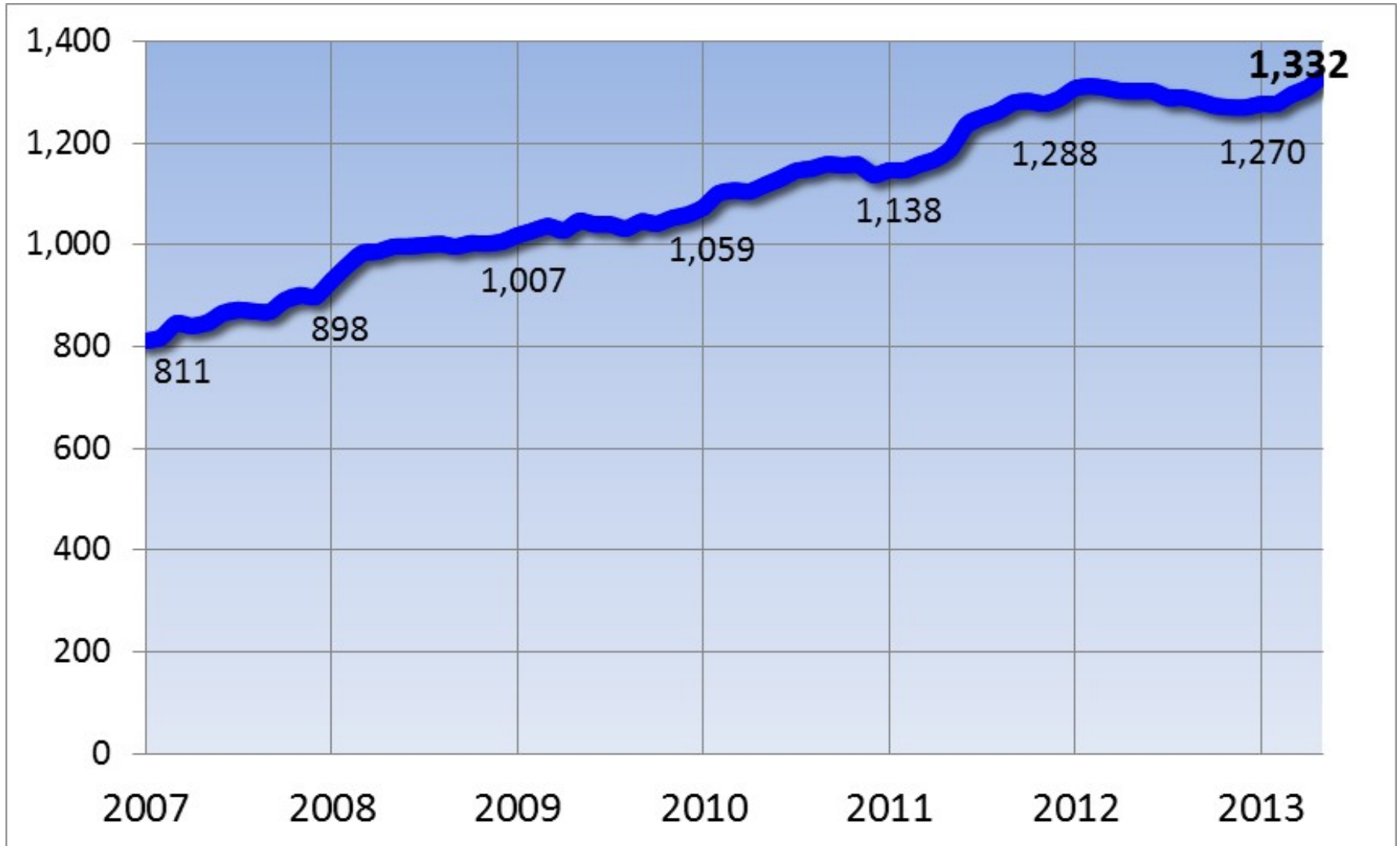


# Measuring Success

## Key Metrics



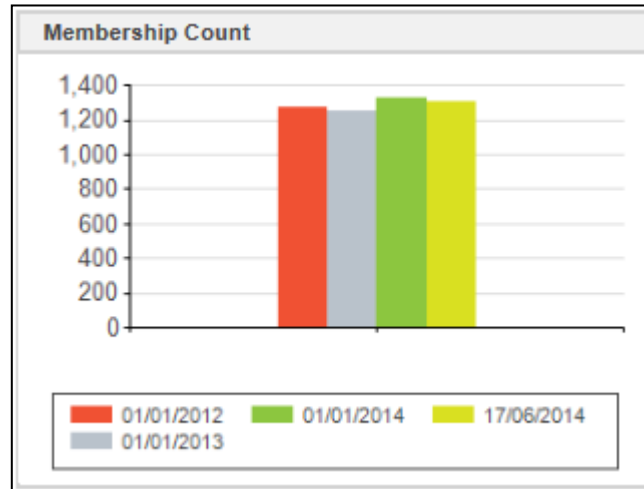
# Membership Growth



# Key Metrics

23%

Members belong to one or more CoPs

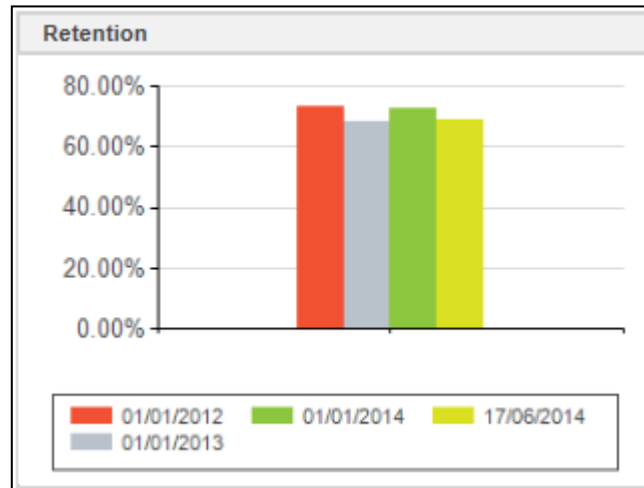


89 / 110

# PDUs / Event Hours

903

Project Management credentials



7 / 10

Of top 10 companies have RCCs

# 2013 PMI Survey Results

86%

Fort Worth chapter's metrics better than Region (13 out of 15)

Overall membership satisfaction  
(5 point scale)

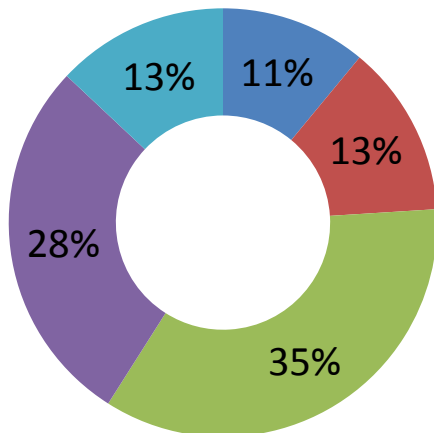
4.3

Region 4.07

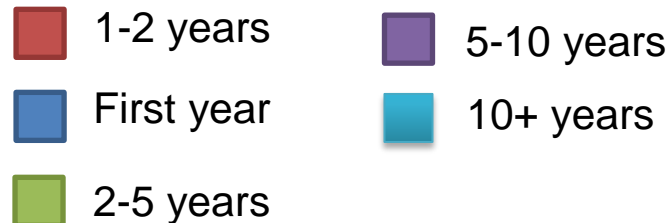
Would you recommend the Chapter?

79%

Region 66%

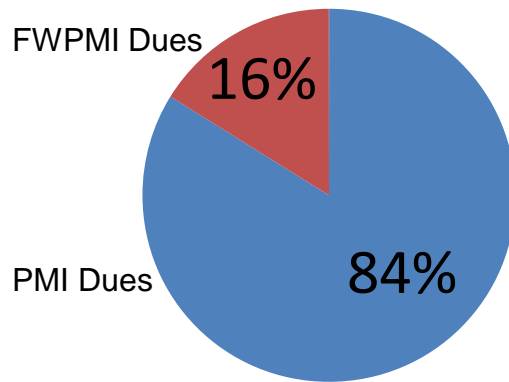


How long have you been a chapter member?



# Value of Membership

## Membership Cost Breakout



- ✓ Meeting discounts \$60/year
- ✓ Workshop discounts \$150/year
- ✓ PMP Exam discount \$150
- ✓ ACP Exam discount \$60
- ✓ Cert renewal discount \$90
- ✓ Access of CoP webinars
- ✓ Download 10 standards \$650

## Priceless...

- ✓ Networking with professionals
- ✓ Knowledge sharing
- ✓ Skill development
- ✓ Career development



# Award Winning Chapter

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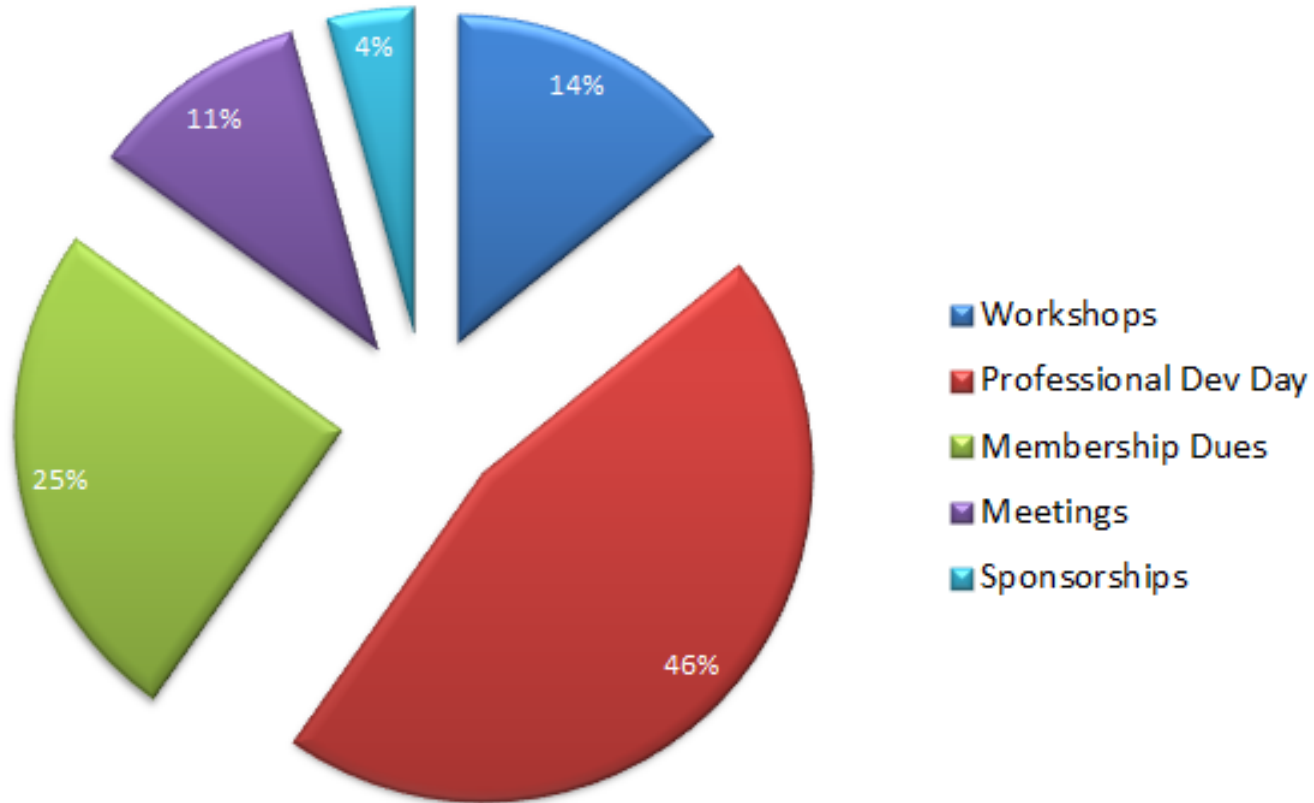
- 2010 (2) Recognition of Excellence  
Toastmasters Outstanding Officers
- 2011 Chapter of the Year
- 2012 (3) Chapter of the Year  
Volunteer Programs  
Leadership, Planning, Operations
- 2013(2) Leadership, Planning, Operations  
Leader of the Year



# Annual Financial Report

# 2013 Income Breakout

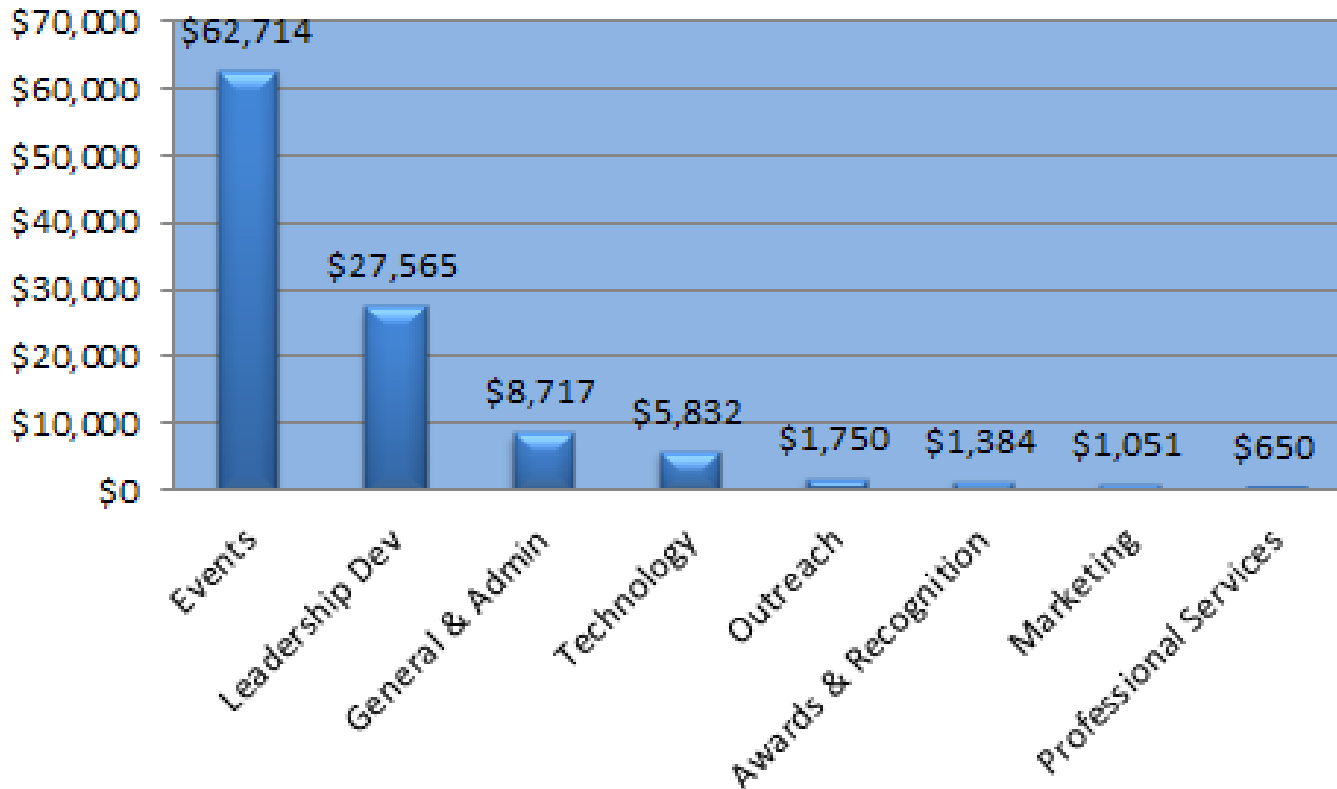
## \$131,496





# 2013 Expense Breakout

\$109,856

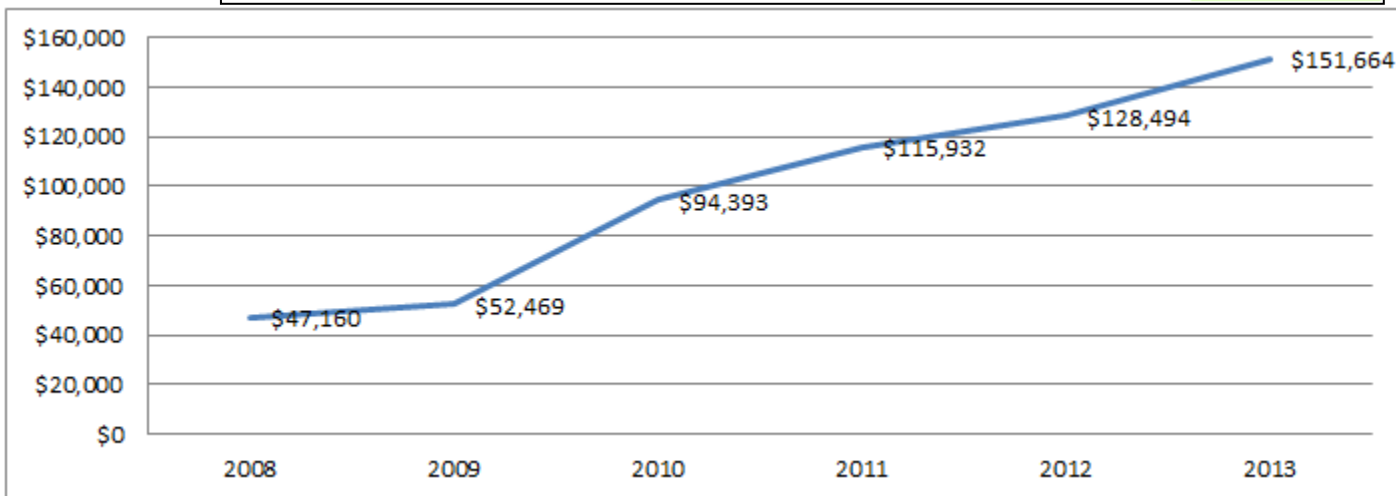




# Balance Sheet

*(Year-Over-Year Performance)*

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





# 2013 Budget Overview

- Budget Results

Income: \$131,496 (1% decrease)

Expenses: \$109,856 (5% decrease)

- Items of Significance

- + Membership continues to grow (5% increase)

- + Very successful Professional Development Day

- Investments made to leverage technology

- Fewer workshops than planned (*impacted income projections*)

- Increased event expenses absorbed (*no increase in registration fees*)

- Increased focus on volunteer leadership development



**Thank you for another successful year!**

*The 2014 Annual Report  
will be available on the Chapter website.  
[www.FWPMI.org](http://www.FWPMI.org)*