



A Year in Review 2012-2013

June 2013 Annual Business Meeting



2012 Highlights

- Chapter of the Year *(2 years in a row!)*
- Completed reorganization
- Chapter policies project – *complete*
- Website enhancements – *complete*
- e-Newsletter subscribers up 14%
- 20 year anniversary



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.

- Monthly workshops to **develop** soft and technical project management **skills**
- PMP, CAPM and PMI-ACP **Certification Prep** courses
- Total of **226 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 **opportunities** small and large
- Define **responsibilities** and **rewards** for each level
- **Leadership development** opportunities including Regional and Global events

Volunteer Management

	Staffing Levels		
	Total	Filled	Open
Level 4	6	6	0
Level 3	17	10	7
Level 2	51	24	27
Level 1	many	some	yes
TOTAL	74	40	34



2013 Board of Directors

Elected Officers

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



Leadership Teams

Cindy VanderSleen

Communications team

Marketing team

Outreach team

VP External Relations

Jonathan Chrisawn, Director

[open]

Laura Krone, Director

Lance Beaty

Membership team

Volunteer Management team

Member Services team

VP Internal Relations

[open]

[open]

[open]



Leadership Teams

Victor Mercado

Finance team

Registration Management team

Governance team

VP Operations

Brad Worley, Director

Lisa Gray, Director

[open]

Sandy Harris

Speaker Management

Event Management

Education team

Administration

PDD team

VP Professional Development

Tony Proctor, Director

Patsy Haines, Director

Garrett McDaniel, Director

Rashidi Benson, Director

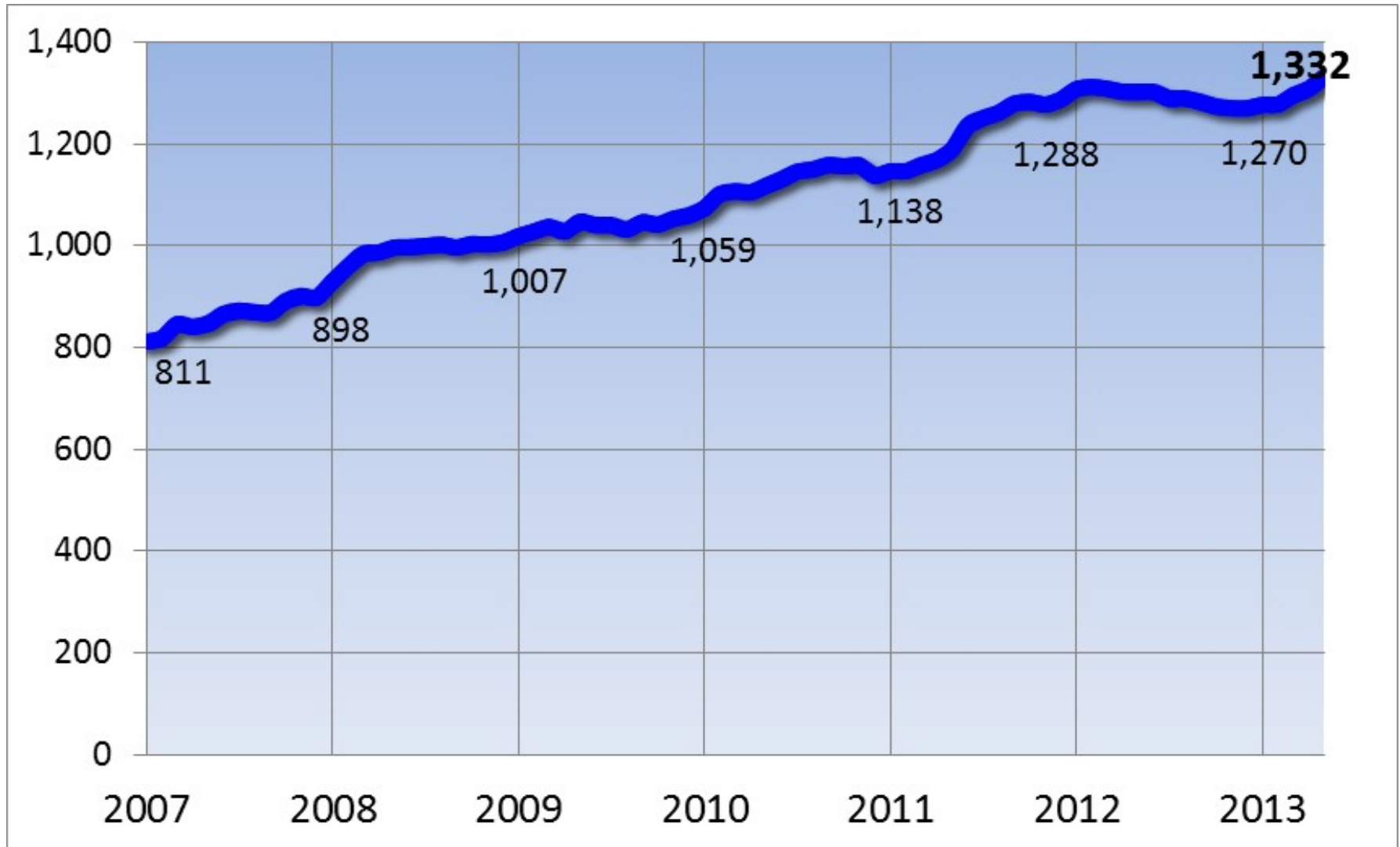
Charlene Dunn, Director



Measuring Success

Key Metrics

Membership Growth



Key Metrics

Year End Statistics

Performance Metric	2007	2008	2009	2010	2011	2012	VLY
Membership	898	1,007	1,059	1,138	1,288	1,270	-1.4%
PMPs	581	642	699	779	860	855	-0.6%
PMPs % of Members	64.7%	63.8%	66.0%	68.5%	66.8%	67.3%	0.6 pts

Events Offered	23	24	37	53	50	55	10.0%
Event Hours Offered	86	97	152	263	297	269	-9.4%
PDUs Offered	65	76	122	217	242	226	-6.4%
# of Speakers	14	16	22	30	38	38	0.0%

Event Registrations		1,095	1,510	1,238	1,299	1,427	9.9%
Event Hours Delivered		3,768	5,917	7,119	7,718	6,049	-21.6%
Total PDUs Delivered		2,479	4,254	5,340	5,637	4,444	-21.2%

RCC Companies	5	13	13	13	17	18	5.9%
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Subscriptions	1,300	1,800	2,250	2,600	3,050	3,490	14.4%
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Survey Results

Fort Worth PMI - 2012 Annual Membership Satisfaction Survey Results

PMI GOC Survey Conducted May 2012

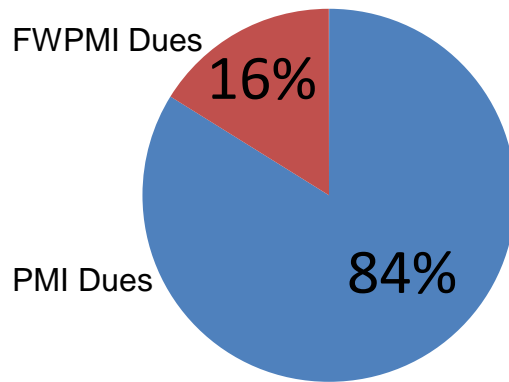
Survey Question	Satisfied			Dissatisfied		Total
	Very	Somewhat	Neither	Somewhat	Very	
Overall Satisfaction with Chapter	117	66	62	4	3	252
	55%	30%	12%	1%	1%	100%
Chapter Events	100	59	32	6	0	197
	60%	23%	14%	3%	0%	100%
Chapter Website	73	39	10	2	0	124
	67%	22%	9%	2%	0%	100%
Communications	100	51	18	1	0	170
	65%	24%	10%	2%	0%	100%
Member Recognition	57	22	10	0	0	89
	69%	20%	11%	0%	0%	100%

Survey 2012		
Actual	Target	Met
4.2	3.2	✓
98%	70%	✓
4.3	3.2	✓
97%	70%	✓
4.5	3.2	✓
98%	70%	✓
4.5	3.2	✓
98%	70%	✓
4.5	3.2	✓
100%	70%	✓

On a Scale of 1-5 with 5 being Best

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

Budget Breakout



- Member Events
- Leadership Development
- Operations
- Outreach & Marketing

	Budget	Actual	
Income	\$141,151	\$132,884	6% less
Expense	\$159,841	\$116,028	28% less
Reserves	(\$18,690)	\$16,857	



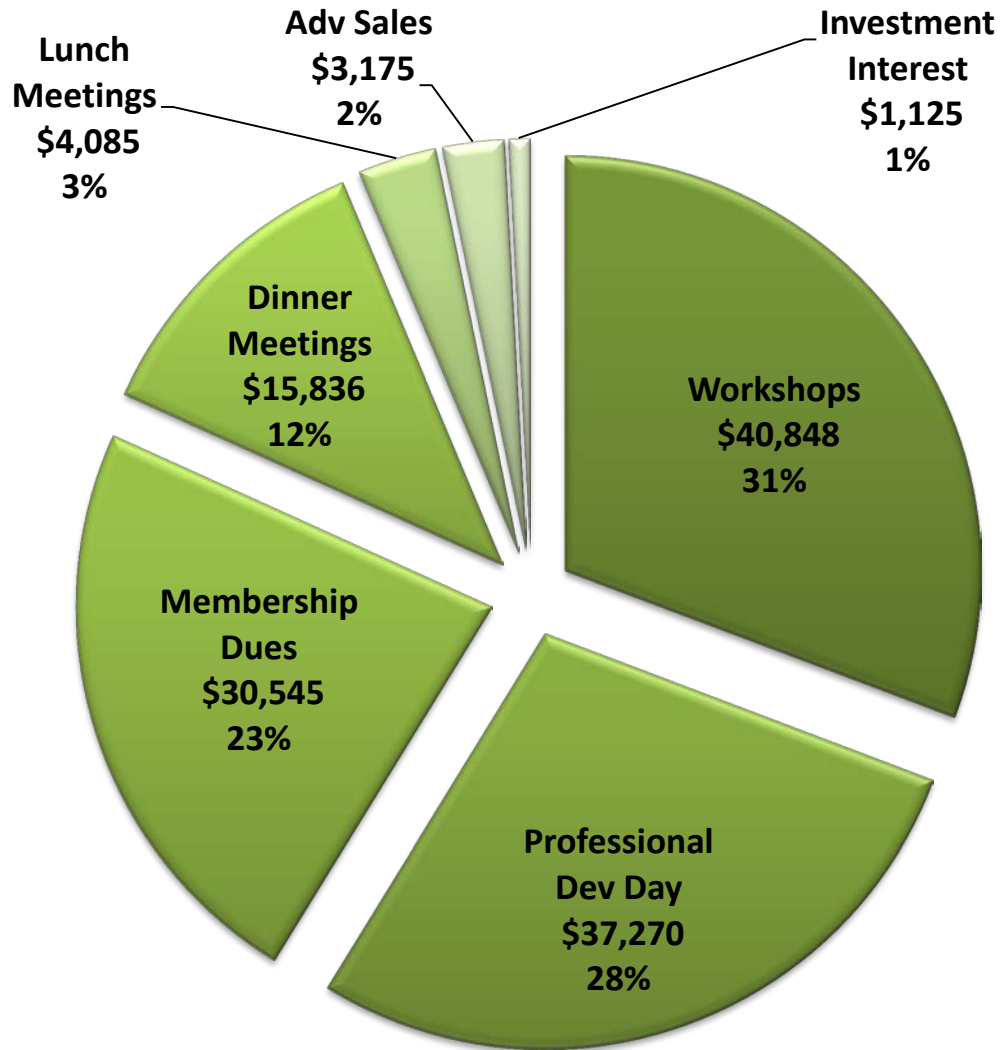
Award Winning Chapter

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



Annual Financial Report

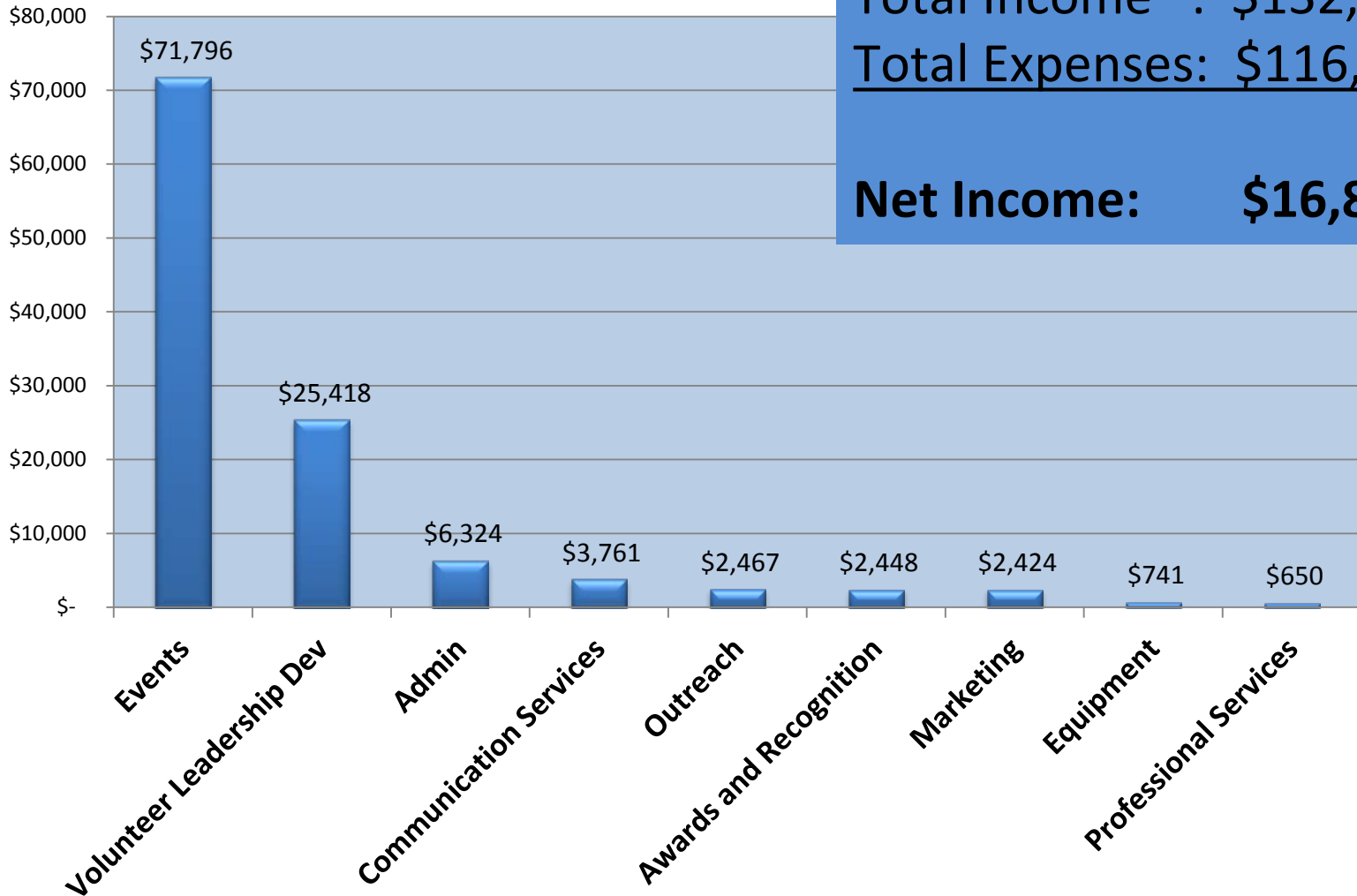
2012 Income Breakout



Total Income: \$132,884



2012 Expense Breakout



Total Income : \$132,884
Total Expenses: \$116,028

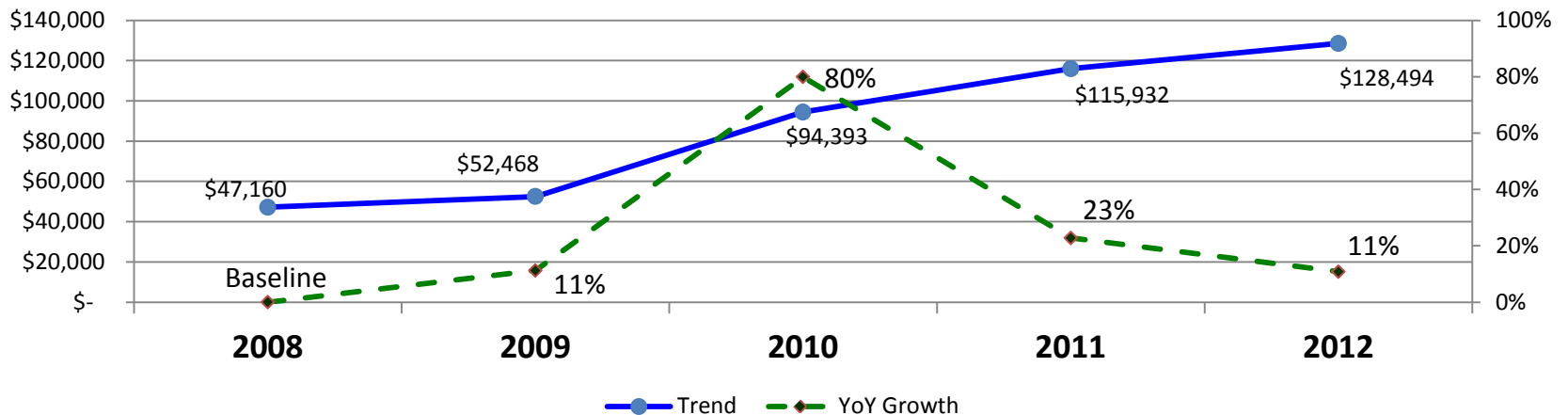
Net Income: \$16,857



Balance Sheet

(Year-Over-Year Performance)

	2008	2009	2010	2011	2012
ASSETS					
Cash (Checking & Savings)	\$ 31,653	\$ 36,798	\$ 83,788	\$ 110,558	\$ 120,840
PayPal	\$ 159	\$ 559	\$ 559	\$ 1,126	\$ 7,580
Investments (CDs)	\$ 15,348	\$ 15,112	\$ 10,046	\$ -	\$ -
Receivables	\$ -	\$ -	\$ -	\$ 4,175	\$ -
Fixed Assets	\$ -	\$ -	\$ -	\$ 73	\$ 73
Total Assets	\$ 47,160	\$ 52,469	\$ 94,393	\$ 115,932	\$ 128,494
LIABILITIES AND EQUITY					
Total Liabilities	\$ -	\$ -	\$ 522	\$ -	\$ -
Total Equity (Reserves)	\$ 47,160	\$ 52,468	\$ 93,871	\$ 115,932	\$ 128,494
Total Liabilities & Equity	\$ 47,160	\$ 52,468	\$ 94,393	\$ 115,932	\$ 128,494





2013 Budget Overview

- Budget

- Income: \$141,151 (Increase of 6% over 2012 actual)
- Expenses: \$159,841 (Increase of 38% over 2012 actual)
- Reserves: (\$18,690)

- Items of Significance

- Board agreed to dip into reserves in order to fund large programs to increase membership value (e.g. PDD Event, Website,)
- Membership continues to grow
- Increased focus on volunteers to support our growing chapter



**For more information regarding this report,
contact the VP of Operations.**

Operations@fwpmi.org