



DALLAS CHAPTER

**Annual Business Meeting**  
**September 12, 2013**



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# AGENDA

- 6:45 Announcements**
- 7:00 Metrics**
- 7:10 Strategic Initiatives/Portfolio**
- 7:15 Financials**
- 7:25 Department Introductions**
- 7:45 Panel Discussion and Q&A**
- 8:25 Close Meeting**



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## *Chapter PMPs in July 2013* Congratulations!

**Mr. Madison Neal Whitten, III, PMP**

**Philip Beck, PMP**

**Umakanth Bilalpur, PMP**

**Mr. Ikram Ahmed Khan, PMP**

**Mr. BK Thomas, PMP**

**Mrs. Pamela Rae Nerpel, PMP**

**Jacob Farkas, Jr., PMP**

**Nancy Hall, PMP**

**Mrs. Melissa Ball, PMP**

**Neil Farquharson, PMP**

**Mrs. Lida Dosser, PMP**

**Sreekumar Siddula, PMP**

**Jaiesh Narsian, PMP**

**Mr. Tony LeFan, PMP**

**Charles Scott Pierce, PMP**

**Ibukun oduwole, PMP**

**Mr. Amaresh Mohan, PMP**

**Shameka Washington, PMP**

**Aaron Heil, PMP**

**William Mullins, PMP**

**Subir Purkayastha, PMP**

**Mr. Walter Scott Joyner, PMP**

**Douglas Dodd Jr, PMP**

**Mr. Steve Lawrence Atlas, PMP**

**Papi Valmond, PMP**

**Geetha Thondar, PMP**

**Krista Kisselburg, PMP**

**Raphael Mathias, PMP**



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## *Chapter PMPs in July 2013* Congratulations!

**Martina De Los Santos, PMP**

**JD Carr, PMP**

**Alexander Rochios, PMP**

**Samuel Crouse, Ph.D., PMP**

**Ana Millan, PMP**

**Mr. Terrence L Berry, PMP**

**Larissa Makeeva, PMP**

**Mohun Sundar, PMP**

**Ms. Sommapan Lathitham, PMP**

**Julie Smith, PMP**

**Himanshu Pandey, PMP**

**Mrs. Stephanie R Armstrong, PMP**

**Mr. Srivatsa Chakravarthy, PMP**

**Karen Price, PMP**

**Mr. Michael Gfeller, PMP**

**Mrs. Elise Golden, PMP**

**Mr. Atulanand Choudhary, PMP**

**Mr. Gerald Joseph Romero, Sr., PMP**

**Stirling Carraway, PMP**

**Colin Catto, PMP**

**Tele Fernandes, PMP**

**Mr. Brian Allen Roder, PMP**

**Mrs. Deborah Leanne Cameron, PMP**

**Adolfo Echeverria, PMP**

**Tracy L. Edwards, PMP**

**Carlos Guzman, PMP**

**barbara kiss, PMP**

**Kathryne L Moore, PMP**



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*Chapter PMPs in August 2013*  
Congratulations!

**Robert Plumlee, PMP**

**Mr. Gregory M. Oehler, PMP**

**Mr. Syed Ali Raza, PMP**

**Doris Dickerson, PMP**

**Mr. Paul Hanoski, PMP**

**Andrea Knudson, PMP**

**Elaine O Connor, PMP**

**Jeff Merl, PMP**

**Mr. Brian Dwornik, PMP**

**Mr. Darryl Dixson, PMP**

**Mr. Ryan Soward, PMP**

**Elaine O Connor, PMP**



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# 2013 Board of Directors

**President**

**Larry L. Johnson, PMP**

**Past President**

**John T. Cole, PMP**

**VP Applied Project Management**

**Sharon McDaniel, PMP**

**VP Communications**

**Nitin Kunte, PMP**

**VP Education**

**Colleen Drabek, PMP**

**VP Finance**

**Glen Millsap, PMP**

**VP Marketing**

**Suzanne Hansen, PMP**

**VP Membership**

**Lon Crozier, PMP**

**VP Professional Development**

**Susan Kennedy, PMP**

**VP Programs**

**Kane Wai, PMP**

**VP Operation and Support**

**Ginan Kalenik, PMP**



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# 2014 Board of Directors

**President**

**Larry L. Johnson, PMP**

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**Sharon McDaniel, PMP**

**VP Communications**

**Nitin Kunte, PMP**

**VP Education**

**Colleen Drabek, PMP**

**VP Finance**

**???????**

**VP Marketing**

**Suzanne Hansen, PMP**

**VP Membership**

**???????**

**VP Professional Development**

**???????**

**VP Programs**

**Kane Wai, PMP**

**VP Operation and Support**

**Ginan Kalenik, PMP**



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# Free Career Development Workshop

**September 28, 2013**

- **Registration 8:15 a.m. to 9:00 a.m.**
- **Event held 9:00 a.m. to 3:00 p.m.**
- **DeVry University Campus**  
**4800 Regent Blvd.**  
**Irving, TX 75063-2439**



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# **PM202 Project Scope Management**

**September 28, 2013**

- **Registration 8:30 a.m. to 5:15 p.m.**
- **Crowne Plaza**
- **8 PDUs**



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## Applied Project Management Speaker Forum

# Make Yourself Matter To Your Team And Your Customers

**September 17, 2013 6-8 p.m.**

- **Location:** UT Dallas, Richardson, TX
- **Pizza at 6 p.m., Speaker 6:30-8:00 p.m.**
- **Event is FREE:** Earn 1 PDU
- **RSVP:** [proj-mgmt@utdallas.edu](mailto:proj-mgmt@utdallas.edu)





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# Change Management Certification Program

Become a subject matter expert in Organizational  
Change Management!

3 Day Workshop (24 PDUs or 24 Strategic HRCI Credits)

\$1,895 Early Registration Price (through Sep. 13)

\$2,095 Regular Registration

[www.changeguidesllc.com](http://www.changeguidesllc.com)  
or call [513-354-9503](tel:513-354-9503)

October 14-16, 2013 - Dallas, TX

9:00 a.m. - 5:00 p.m.





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WHERE LEADERS ARE MADE  
[www.toastmasters.org](http://www.toastmasters.org)

# Dallas PMI Toastmasters Club

## Monthly Meeting

### September 21, 2013

- **9:00 a.m. - 11:00 a.m.**
- **Marriott Courtyard - Plano at Legacy Park**
- **2 PDUs**

Excellent opportunity to improve formal and impromptu presentation skills while focusing on Knowledge Areas from A Guide to PMBoK.



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# **Breakfast Meeting**

**"Six Sigma and Project Management Integration" with  
Dr. Edward Richards**

**September 14, 2013**

- **9:00 a.m. - 12:00 p.m.**
- **Marriott Courtyard - Plano at Legacy Park**
- **3 PDUs**



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# **Institute of Management Consultants**

**September 16, 2013**

- **Event held 5:00 p.m. to 8:00 p.m.**
- **Topic – Consultants: The good. The bad. The Ugly**
- **Promo code - IMCDFWWelcome**
- **Frontiers of Flight Museum at Love Field**



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# Metrics



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# Volunteer Organization

- Board of Directors – 11
- Directors – 147
- Volunteers – 71



# Key Metrics

## DALLAS CHAPTER

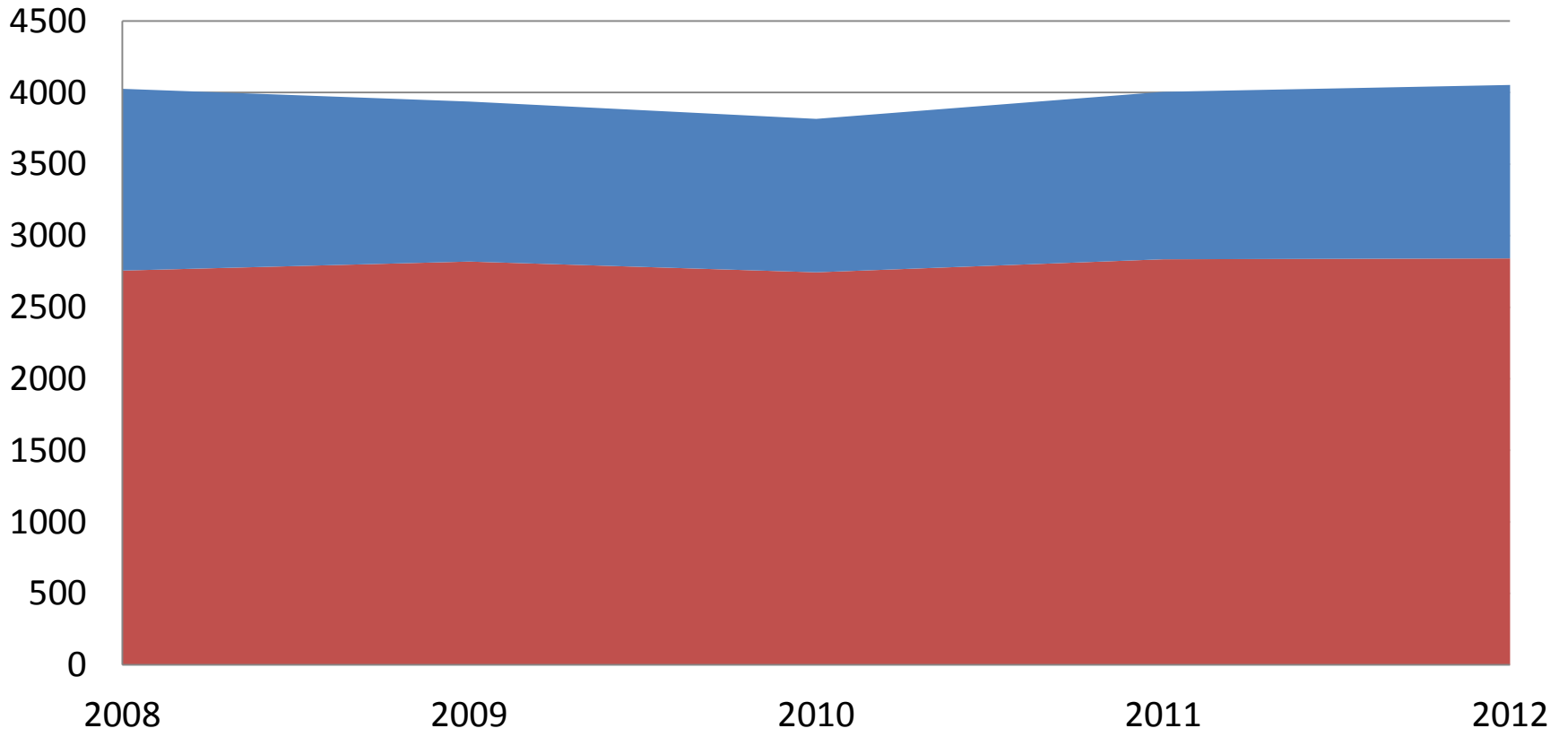
	2008	2009	2010	2011	2012	August 2013
<b>Membership</b>	<b>4026</b>	<b>3937</b>	<b>3816</b>	<b>4005</b>	<b>4053</b>	
<b>PMPs</b>	<b>2732</b>	<b>2793</b>	<b>2716</b>	<b>2793</b>	<b>2774</b>	
<b>PGMP</b>	<b>5</b>	<b>9</b>	<b>8</b>	<b>10</b>	<b>8</b>	
<b>CAPM</b>	<b>19</b>	<b>17</b>	<b>20</b>	<b>26</b>	<b>22</b>	
<b>Risk</b>				<b>4</b>	<b>8</b>	
<b>Schedule</b>				<b>2</b>	<b>4</b>	
<b>Agile</b>					<b>25</b>	
<b>% of Members Certified</b>	<b>68%</b>	<b>72%</b>	<b>72%</b>	<b>71%</b>	<b>70%</b>	



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# Membership Growth

■ Certified Members   ■ Members





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# Why Members Join

Reason	Percentage
PDU	23%
Networking	27%
Prepare for PMP Exam	10%
Advance the Profession	12%
Access Local Knowledge	9%
Up-to-date on News	15%
Other	4%

*2012 Member Survey*



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# Annual Survey Results

**Satisfied**

**Dissatisfied**

Survey Question	Satisfied			Dissatisfied	
	Very	Somewhat	Neither	Somewhat	Very
<b>Overall Satisfaction</b>	<b>38%</b>	<b>31%</b>	<b>25%</b>	<b>4%</b>	<b>2%</b>
<b>Chapter Leadership</b>	<b>41%</b>	<b>27%</b>	<b>29%</b>	<b>1%</b>	<b>2%</b>
<b>Chapter Events</b>	<b>44%</b>	<b>31%</b>	<b>20%</b>	<b>4%</b>	<b>1%</b>
<b>Chapter Website</b>	<b>37%</b>	<b>34%</b>	<b>21%</b>	<b>7%</b>	<b>1%</b>
<b>Communications</b>	<b>45%</b>	<b>36%</b>	<b>16%</b>	<b>2%</b>	<b>1%</b>

*2012 Member Survey*



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# Strategic Initiatives/Portfolio



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## **Vision**

**The PMI Dallas Chapter will be recognized as the professional organization and resource of choice for project management within the Dallas area.**



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## **Mission**

**To support the growth and development of project management practitioners as well as build awareness of the project management discipline and its critical role in business and organization success.**



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# Strategic Objectives

- 1. Increase the level of engagement with project management practitioners.**
- 2. Provide outreach to build awareness of the value of project management.**
- 3. Continuously improve the Dallas Chapter.**



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# Increase Engagement

- 1. Sponsor or Adopt a Chapter**
- 2. Deliver Educational Events each quarter**
- 3. Participate Globally**



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# **Build Awareness**

- 1. Venue for job opportunities**
- 2. Corporate outreach events**



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# Continuous Improvement

- 1. Manage to budget**
- 2. Value, recruit and manage volunteers so that both the Chapter and the individuals benefit**



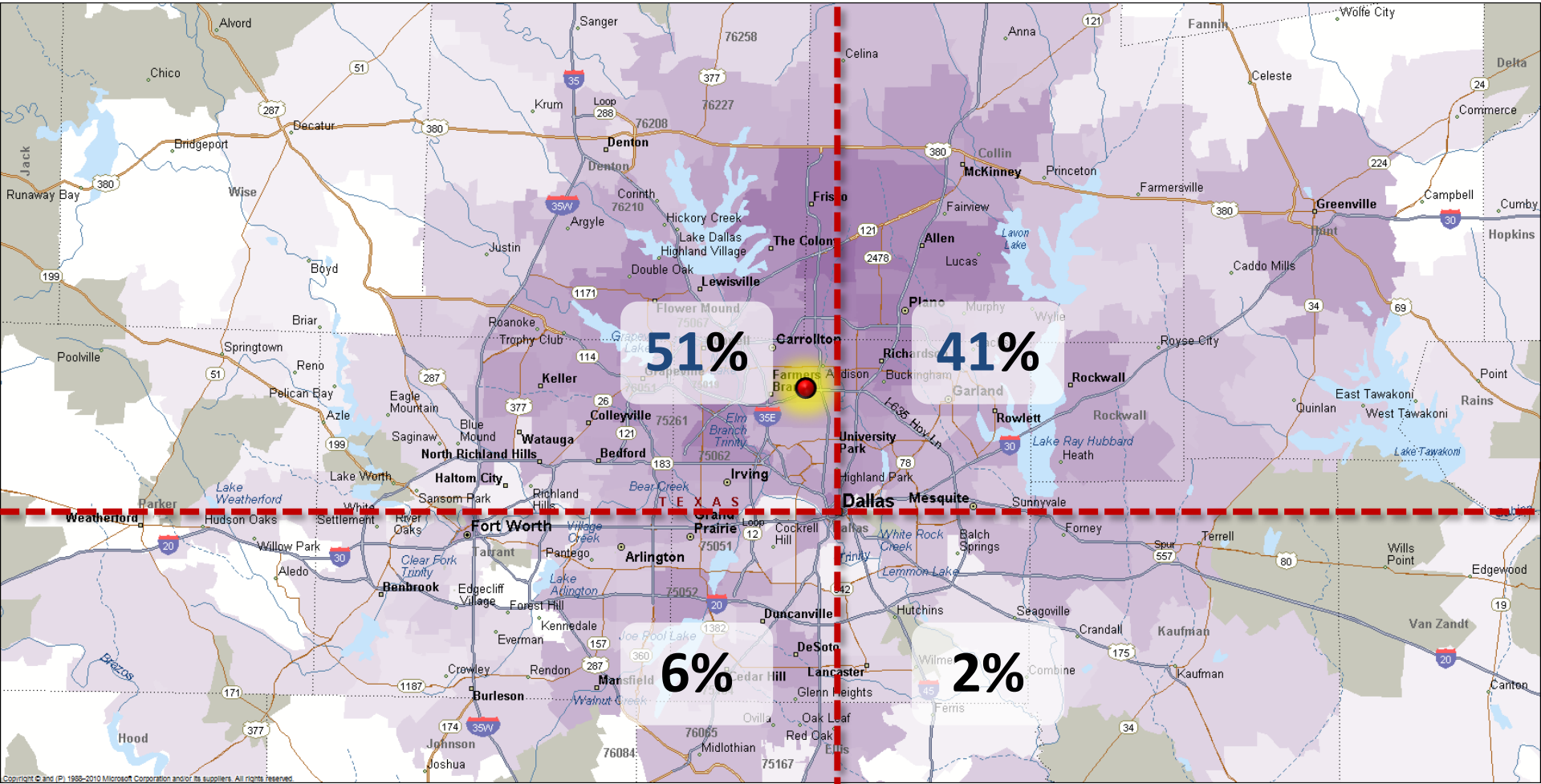
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# 2012 Member Survey

- 1. Chapter is closed off**
- 2. Don't know I'm able to attend meetings until the last minute**
- 3. Location of events is a challenge**



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# Members & Prospects (Home & Work)

Based on the Sep2011 DEP



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# Scholarships

- 1. James Rankin Memorial Scholarship**
- 2. Wayne K. Latham Memorial Scholarship**
- 3. Dwaraka R. Iyengar Scholarship**



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# Financials



# 2012 Balance Sheet

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## Assets

Cash (Checking & Savings)	\$ 307,213
Receivables	\$ 128
Fixed Assets	\$ 5,013

<b>Total Assets</b>	<b>\$ 312,354</b>
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## Liabilities & Equity

Liabilities	\$ 164,883
Equity	\$ 147,472

<b>Total Liabilities &amp; Equity</b>	<b>\$ 312,355</b>
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# 2012 Income Statement

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### Income

Event Registration Fees	\$ 139,409	62%
Membership Dues	\$ 80,155	35%
Sponsorships & Interest	\$ 6,436	3%
<b>Total Income</b>	<b>\$ 226,000</b>	<b>100%</b>

### Expenses

Events COGS	\$ 123,660	55%
Leadership Development	\$ 42,839	19%
Scholarships/Promotional	\$ 24,697	11%
Office Expenses	\$ 20,472	9%
Bank & Credit Card Fees	\$ 7,951	4%
Professional Services	\$ 4,388	2%
Toastmasters	\$ 1,165	1%
<b>Total Expenses</b>	<b>\$ 225,172</b>	<b>100%</b>

<b>Net Income</b>	<b>\$ 827</b>
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# Department Introductions



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# President

- Preside over chapter, special, and business meetings
- Liaison with the Project Management Institute
- Submit reports to PMI



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## Past President

- Coordinates Past Presidents Council
- Leads the nominations committee



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# **VP Applied Project Management**

- Liaison with PMI Communities of Practice
- Annual and Component of the Year Reports
- Coordinate with Non-profits



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## **VP Communications**

- All Chapter communications including the website
- Coordinate advertising and sponsorships
- Public Relations activities



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## **VP Education**

- Education activities related to PMI Certifications
- Assumes office of President if that office become vacant



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## **VP Finance**

- Prepare the annual budget
- Prepare periodic financial statements
- Maintain checking and other banking accounts
- Responsible for the registration team



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## **VP Marketing**

- RCC meetings and recruitment
- Marketing Plan Development
- Sponsor Value and Survey Development
- Career Resources Committee



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## **VP Membership**

- Member Services (engage, orient and address member concerns)
- Volunteer Services (coordinate and recognize volunteers)
- Reporting Services (track and report membership stats)
- Mentoring Program (provide vision, direction, monitor and report accomplishment)



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## **VP Operation and Support**

- Manage all meeting contracts and event coordination with the facilities
- Manage all purchasing
- Support all departments for Administrative activities

# VP Professional Development

## Teams

- Symposiums
- Workshops
- Webinars
- Book Reviews
- Presenters
- Vendor Promotions

## Quick Facts - 2013

- 21 Events (15 FREE to Members)
- Apx. \$28K in Gross Revenue
- 66 FREE Books to Members
- Team volunteers hours/month for PMI





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## **VP Programs**

- Monthly dinner meeting programs
- Breakfast meeting programs



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# Q&A