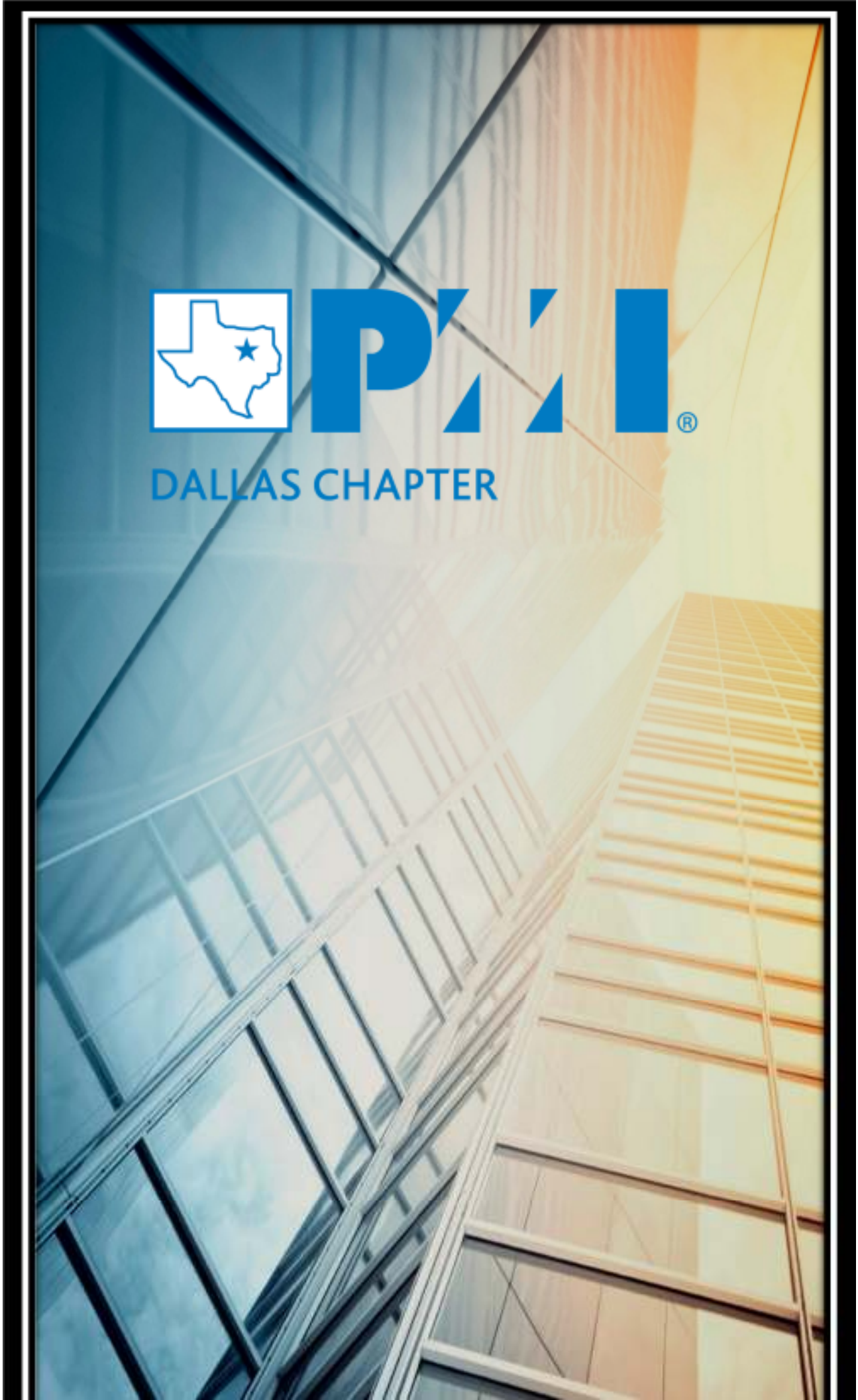


2013 ANNUAL REPORT

To the members of the Dallas Chapter,

Thank you for a successful 2013. The Board of Directors appreciates your support and look forward to serve you in 2014. We are committed to bring you value in the form of education, professional development, corporate and community service.

- 2013 PMI Dallas Board of Directors

Mission

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



Vision

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

DALLAS CHAPTER

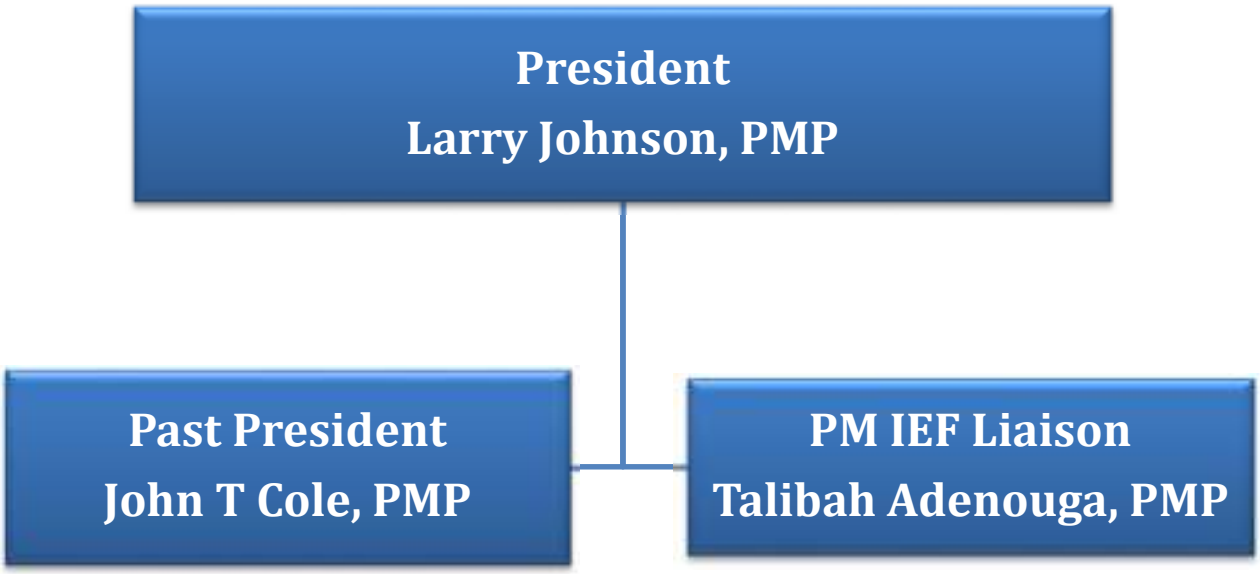
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PMI Dallas Chapter



Project Teams


President
Larry Johnson, PMP
Past President
John T Cole, PMP
PM IEF Liaison
Talibah Adenouga, PMP

President

Dear Member,

Looking back over the prior year always provides mixed results. On one hand, I am very proud of all the volunteers of the PMI Dallas Chapter. First, even though we are an all-volunteer organization we provide a broad level of services to a large community and do so at a very high level. Second, we continue to add new services. This year we began a new feature, the Leadership Forum. This free half PDU meeting held before every other dinner meeting has been growing in popularity each month. These facilitated learning sessions help people hone their knowledge in leadership areas. One of the most consistently identified skill gaps for project managers is leadership and these short sessions help to fill those gaps. Every time we hold one of these events someone approaches me with positive feedback. This is just one example of the new programs we've instituted in the last year. On the other hand, I look over the last year and all we had hoped to do but remain undone and this frustrates me. Very much like our day jobs we do not have the resources, manpower, or time to get everything done we hope to.

Over the last year we continue to build on the foundation we started in 2012. We continue to improve our budget planning and tracking process. We continue to perform an annual strategic planning session. Each of the last two years, when we've held our strategic planning sessions, we've only looked one year out. This year, we began to look at a five year horizon. We set some longer term goals for the organization. I'm excited about these initiatives and hope you'll soon see these come to fruition. We held another online election and with the other improved processes were able to present an annual report to our members in a dinner meeting. Moving forward we'll continue to build on these.

One trend that concerns me is that both our membership and our attendance at our meetings seems to have flattened as compared to 2012. Everything we do has two goals. We strive to serve our existing membership in a way that provides real value. Next, we hope to provide programs that encourage attendance by anyone working as a project manager or is interested in project management but have never attended an event. We will continue to look at what we do in order to increase the level of engagement of all our stakeholders.

As I look forward to the coming year, I urge you to provide feedback to the Board in any way you feel comfortable. We do our best to reach out, asking for input and volunteers, but must hear from you what we are doing right and what we can do better. We need volunteers who can contribute even small amounts of time for short durations to get the improvements we all want.

Thank you for being members of the PMI Dallas Chapter and for your continued support.

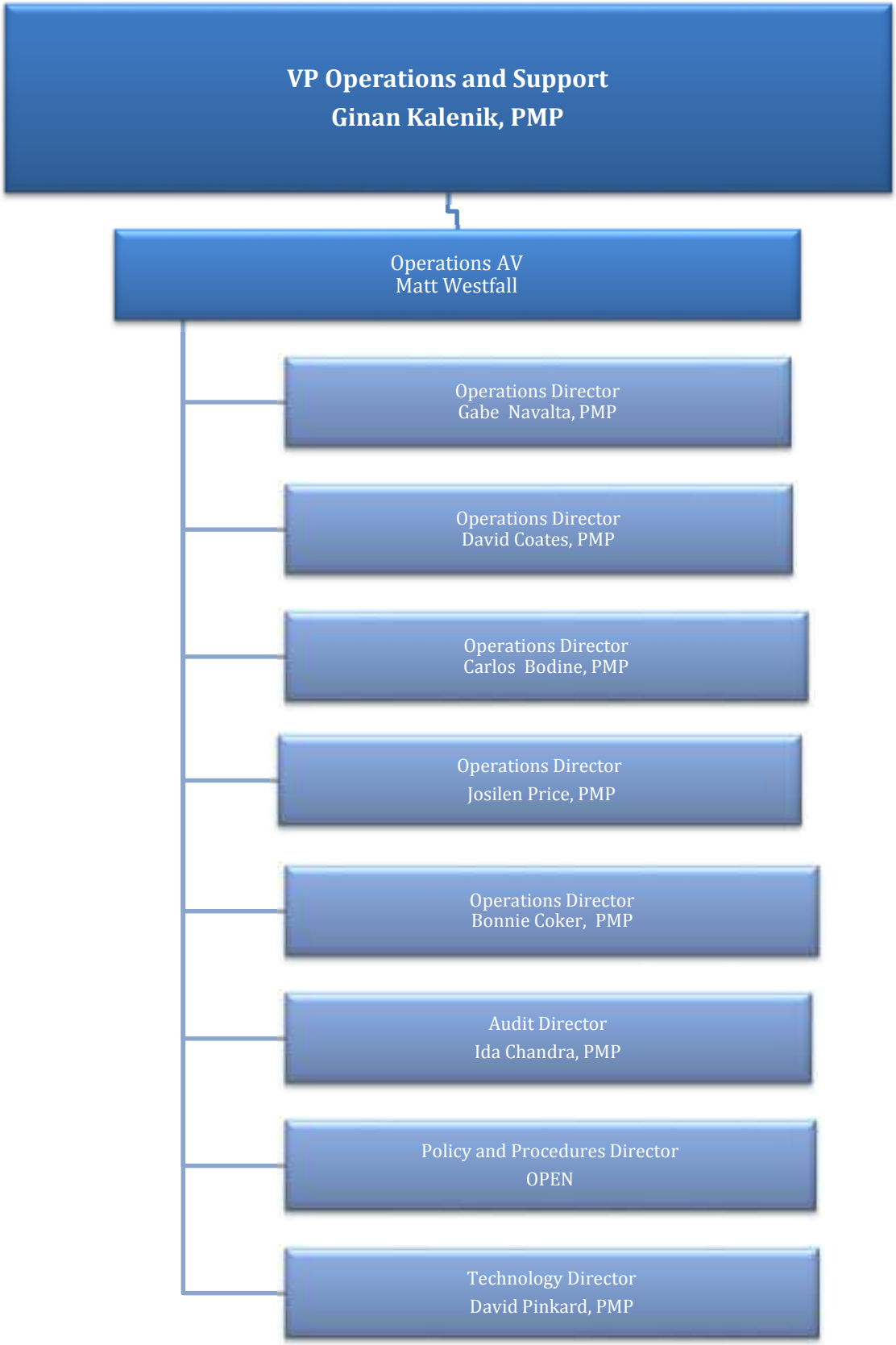
~ Larry Johnson, MBA, PMP

PMI Education Foundation

The Education Foundation Liaison team's goal is to establish a pilot program that could be implemented during the course of a school term for elementary, junior high and high school students in the DISD area.

2013 Accomplishments:

- Initiated an engagement with Bishop Dunn High School
- Presented program with Bishop Dunn staff and leadership
- Obtained approval from school leadership to begin program early 2014
- Created curriculum/lesson plan outline and schedule for 6 - 10 week program
- Created and submitted budget
- Formed formal PMIEF Dallas Chapter team
- Clarified objectives for team


VP Operations and Support
Ginan Kalenik, PMP
Operations AV
Matt Westfall
Operations Director
Gabe Navalta, PMP
Operations Director
David Coates, PMP
Operations Director
Carlos Bodine, PMP
Operations Director
Josilen Price, PMP
Operations Director
Bonnie Coker, PMP
Audit Director
Ida Chandra, PMP
Policy and Procedures Director
OPEN
Technology Director
David Pinkard, PMP

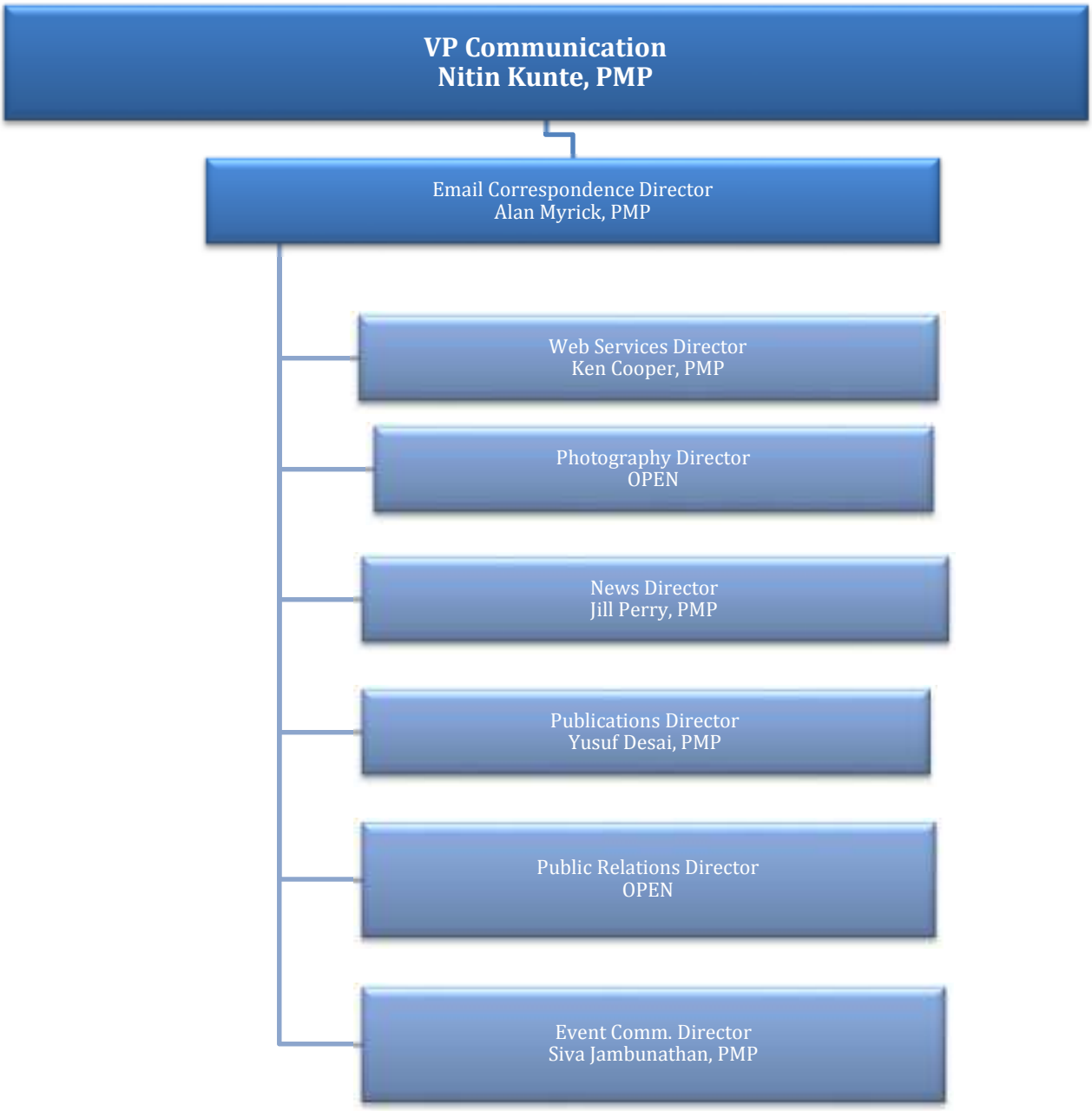
Operations and Support

The Operations and Support department is comprised of two standing teams and several individual contributor roles. Many of our functions are ongoing in nature, such as supporting regularly occurring meetings, but we also have ad-hoc tasks aimed at solving issues.

Key 2013 accomplishments include the following:

- Dinner Meeting BOD welcome – dinner attendees identifying themselves as first time attendees, recent PMPs, or guests are extended an offer to sit with a BOD member at the dinner. Those accepting the offer are welcomed in to the dining room early to meet with their BOD assignee and given time to receive an individualized welcome to the chapter, including a gift of logo items. This program has been successful in getting new attendees involved in the chapter.
- Contact Us Response Team – this team provides timely and informative responses to all email inquiries originating from the chapter web site.
- BOD Election coordination – the Operations team managed the interface between the Elections Committee and PMI to set up the electronic voting for the elections.
- Purchasing – the Operations team sourced a variety of logo merchandise for use by the chapter for event attendee and speaker awards. Items for the chapter's 30th anniversary were sourced well in advance, allowing for the distribution of items as a year end 2013 gift and also a 2014 year opening 30th anniversary commemorative logo pin. All sourcing was done in advance to avoid rush charges, quantities were coordinated between departments to assure volume discounts and merchandise storage and turnover was managed to minimize shrinkage.
- Quarterly purchase schedules were identified to coordinate purchases of repetitive items such as badges and shirts.
- Event bookings were managed well ahead supporting the 3Q13 distribution of the 2014 magnetic chapter calendar.
- Conference reservation management – hotel and conference reservations were managed to assure the accuracy and cost control of the attendance.

The Operation and Support team will continue to address the ongoing operational needs and provide support to the chapter in 2014.


VP Communication
Nitin Kunte, PMP
Email Correspondence Director
Alan Myrick, PMP
Web Services Director
Ken Cooper, PMP
Photography Director
OPEN
News Director
Jill Perry, PMP
Publications Director
Yusuf Desai, PMP
Public Relations Director
OPEN
Event Comm. Director
Siva Jambunathan, PMP

Communications

The Communications team is responsible for any and all outward facing communication for the PMI Dallas chapter. Apart from handling outside communication, our team is also responsible for the Chapter's website and social networking sites (Facebook, LinkedIn and Twitter) and Chapter emails.

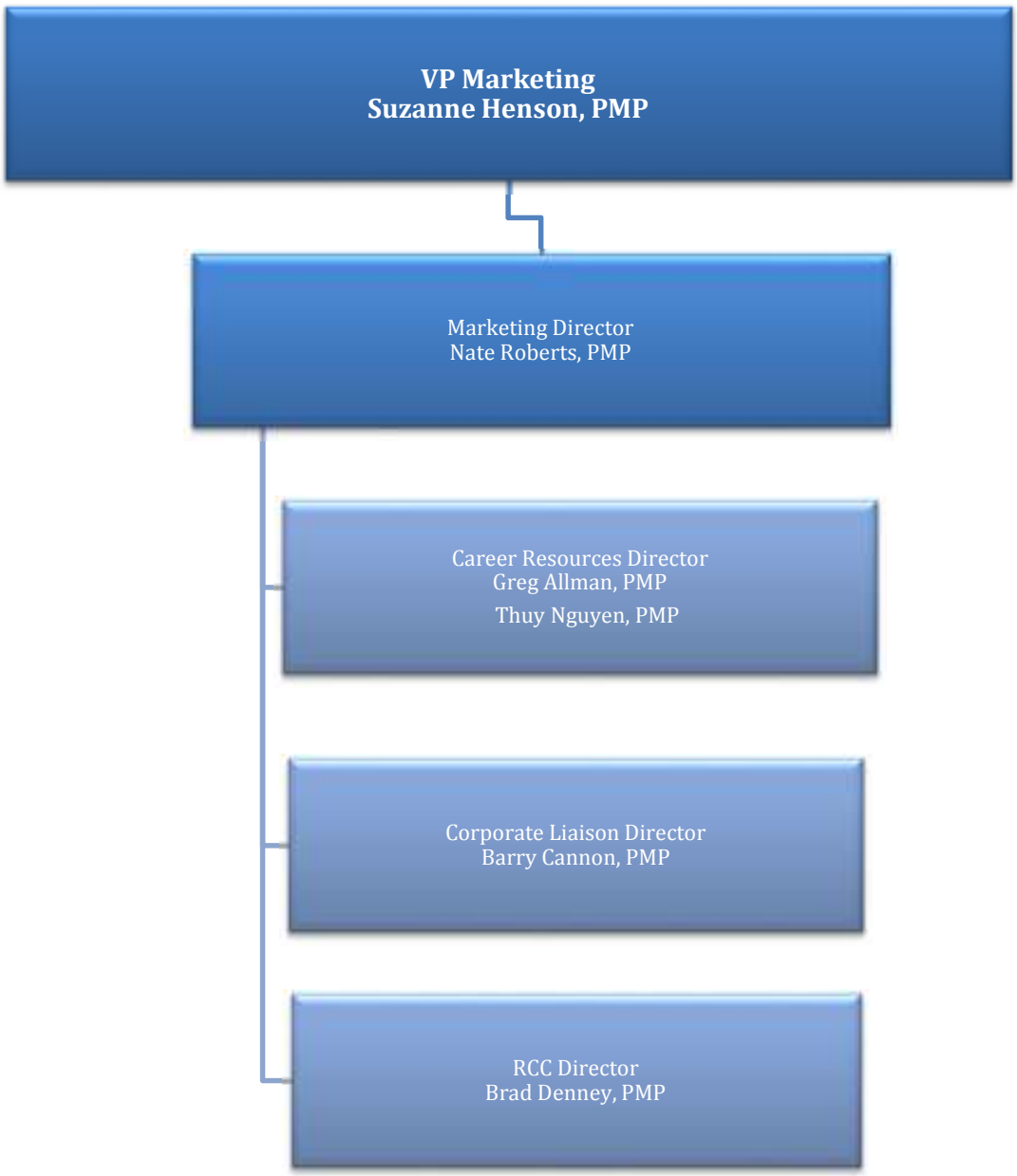
Goals

- Inform members about PMI & Chapter activities
- Promote Chapter and PMI to potential new members
- Educate other PMI components about chapter best practices
- Establish communications policies and procedures for Chapter
- Provide revenue for communications budget
- Drive attendance for Chapter events
- Provide members only benefit which enhance the project management profession
- Support Chapter officers in communications initiatives

Accomplishments in 2013

- Updating the website with new features – for example, Single Sign On (which was later removed)
- Volunteer email administration – plan to move to Office 365
- Public relations materials – help other teams with material
- Sponsorship – help and manage sponsorship
- Mass member communication items – send out timely pertinent information to members- for example, election notices & results
- Promotional materials – work with other teams to create promotional materials
- Publications – worked on members only publications.
- Communications policies and procedures – finalized the policies and procedures
- Monthly newsletter – sent monthly newsletter to members and other subscribersSocial media – used Twitter, LinkedIn & Facebook to communicate Chapter events & other relevant information
- Provide matrix to ascertain member participation
- Member survey – sent member survey to gauge member requirements

The communications team will increase its efforts during 2014 to provide more effective communication for benefit of our chapter members.


VP Marketing
Suzanne Henson, PMP
Marketing Director
Nate Roberts, PMP
Career Resources Director
Greg Allman, PMP
Thuy Nguyen, PMP
Corporate Liaison Director
Barry Cannon, PMP
RCC Director
Brad Denney, PMP

Marketing

The Marketing program is comprised of three committees listed below:

- Career Resources (CR) Committee
- Corporate Liaison and Marketing (CLM) Committee
- Regional Company Coordinator (RCC) Committee

The Marketing team key accomplishments in 2013 are:

- Realized significant new growth in volunteer members in all three marketing committees. This team provided valuable member services and spread the word about various PMI events to grow and retain the chapter membership base.

- Held RCC team meetings with good participation sharing knowledge about PM best practices and approaches. These events were well received with presentations by RCCs or chapter members to support the advancement of the PM profession through networking with colleagues. The RCCs also represented the Chapter within their respective organizations advancing the PM profession within their companies.

- Four Corporate Liaison/RCC outreach events were held with Dell, Sabre, Amdocs and the Thomson-Reuter RCC team helped start a new successful Agile COP community outreach project. They also represented the Agile COP at a user group booth where there were 400 conference participants.

- The Career Resources team provided two free Career Development Workshops that were conducted successfully with high member customer satisfaction. Attendees earned PDUs and various topics were covered such as salary negotiation, how to optimize resumes how to do job searches more effectively and social media related to job hunting.

- Many members signed up for the Blue Dot Register to receive notice of job vacancies. This Register is designed for the unemployed or under-employed or those seeking to keep up with the latest PM opportunities. Even in the down economy, the PMI Dallas Chapter receives many job vacancies that need to be

filled quickly. Key job leads were also posted on the PMI Dallas Chapter internal web site for all members to view.

- The CLM team focused on continual improvement looking for ways to provide even greater value to our Chapter stakeholders. They focused on developing a new Chapter Marketing Plan. The CLM team also surveyed sponsors, documented existing sponsor value areas and researched new ways to add value to sponsors in the future too.

- Committee member volunteers attended dinner meetings, recruited new volunteers, supported the Blue dot/green dot program and served on information tables at dinner meetings.

The Marketing team will continue to focus on existing committee goals to promote the Chapter and begin to prioritize and implement various new marketing plan improvements in 2014. These improvements will focus on promotion of existing or new value add services in order to retain/grow membership and stakeholder involvement.


VP Education
Colleen Drabek, PMP
PM101 Basic PM Director
Wes Menzies, PMP
PM201 Comm. Class Director
Mike Sutton, PMP
PM202 Scope Class Director
Ned Mitenius, PMP
Stuart Tozier, PMP
PM203 Risk Class Director
Suchitra Veera MBA, PMP
PM205 Leadership Class Director
Kathy Bailie, PMP
Student Outreach Program Director
OPEN
PMP Exam Review Director
Beth Burnside, PMP
James Knesek, PMP
Library Director
Penni James, PMP

Education

The mission of the Education Program is to provide educational events and opportunities for members to learn about the project management profession. This includes project management related training and resource tools like books, library and templates to further personal growth and development. This is one of the key values of the PMI Dallas Chapter.

The Education Committee consists of seven committees that include; PM101 Basic Project Management, PM201 Communications, PM202 Scope Management, PM203 Risk Management, PM205 Project Team Leadership, PMP Exam Review and the Library. The goal is to provide strong support for the development of Project Management Professionals through hands on interactive courses, and provide opportunities to share experiences.

The Chapter Resource Library serves the membership of the PMI Dallas Chapter by developing and maintaining collections of professional, educational and reference materials to support the Project Management profession. In 2013, the library contained 375 books for members to check out.

A total of 20 training classes were provided during the year, with a total of 293 attendees as noted below:

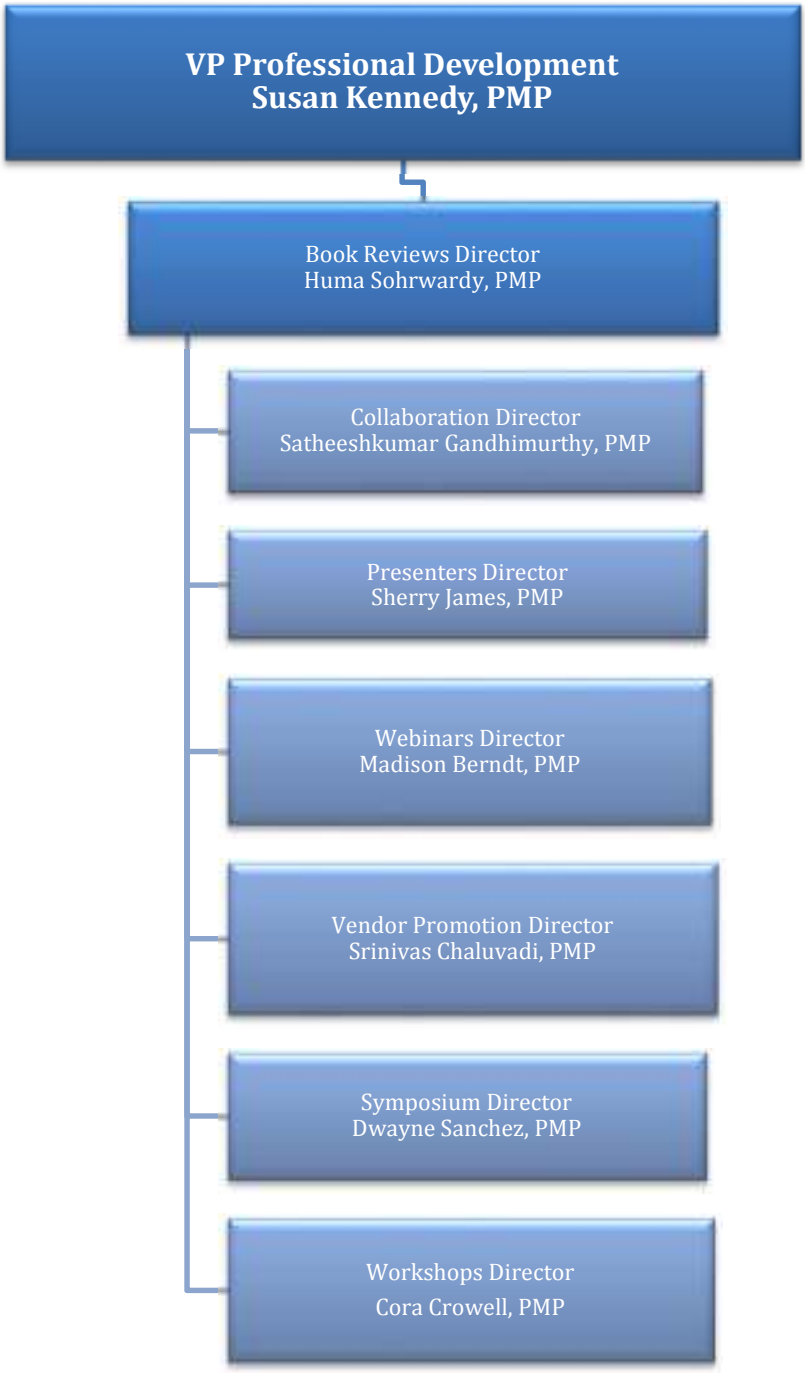
- Three PM101 Basic Project Management classes held with 52 attendees
- Four PM201 Communication Management classes held with 35 attendees
- Three PM202 Scope Management classes held with 52 attendees
- Four PM203 Risk Management classes held with 49 attendees
- Three PM205 Project Team Leadership classes held with 44 attendees
- Four PMP Exam Review held with 61 attendees

The PMP Exam Review team updated their presentations and began using new vendor documentation provided by Crosswind. The documentation is distributed at the class for additional materials to help study for the PMP exam.

The PM101 Basic Project Management and PM201 Communications Management classes were redesigned and updated with new information and feedback received from attendees.

There were 3 new directors that joined the education committee in 2013.

The library was available and open at 9 monthly meetings during 2013.


VP Professional Development
Susan Kennedy, PMP
Book Reviews Director
Huma Sohrwardy, PMP
Collaboration Director
Satheeshkumar Gandhimurthy, PMP
Presenters Director
Sherry James, PMP
Webinars Director
Madison Berndt, PMP
Vendor Promotion Director
Srinivas Chaluvadi, PMP
Symposium Director
Dwayne Sanchez, PMP
Workshops Director
Cora Crowell, PMP

Professional Development

Book Reviews Team

The Book Reviews team provides book and reading related professional development opportunities to PMI Dallas Chapter members. In 2013 the team administered two programs: Book Reviews and Book Club.

- **Book Review program-** the Book Review program provides free books to members who read and write reviews.
- **Book Club -** n 2013, the Chapter launched our first book club. The goal of the club is to provide a forum for members to network, socialize and review books.

The main focus of the books is project management but other related topics such as portfolio management, program management, soft skills (leadership, team building), business analysis, supply chain management, business management and other topics are also covered.

Accomplishments 2013

Distributed 184 books to PMI Dallas Chapter members to date 118 Book Reviews returned/published - exceeded target of 50% completion rate (63%)

Leadership Forums Team

The Leadership Forums team facilitates member discussion of topics that impact the project management industry. In 2013, the team presented five forums to the PMI Dallas and Ft. Worth members and guests.

Accomplishments 2013

Provided four free pre-dinner networking workshops:

1. **Crucial Conversations**
   How do you deliver bad news to your clients or project team?
2. **Recognition as a Reward**
   Tips on how to reward your project team and clients using genuine, well rounded recognition
3. **Serving as a Leader**
   Servant Leadership in a PM role

4. **Agile/ Smagile**
   How to "name" your methodology without scaring your clients

Symposiums Team

The Symposiums team plans and participates in an annual project management symposium. The team is primarily responsible for recruiting, training and managing the 35 volunteers who support the two-day event. The Symposium team also participates throughout the year in planning, strategy and continuous improvement.

In 2013 the symposium was jointly sponsored by the UTD School of Management, Dallas.

Accomplishments 2013

- Exceeded net profit targets by 12%
- Symposium attracted 400 attendees
- Team recruited, trained and managed 30 volunteers Facilitated volunteer lessons learned session and implemented several improvements

In addition to the above accomplishments, the chapter's participation and networking with the symposium partners has led to the initiation of other benefits for members. These include:

- Bi-monthly Alumni dinner/presentation
- Webinars
- Re-use of presentations, RCC events
- UTD rooms available for team meetings

Workshops Team

The Workshops team coordinates with leading vendors and professional speakers to offer project management workshops for PMI Dallas Chapter members.

Accomplishments 2013

Planned, organized and coordinated a full-day workshop event with a leading project management trainer. Contributed net profits to the chapter attracted 22 member attendees. Improvements completed to the standard workshops contract, project plan and lessons learned.

Webinars Team

The Webinars team plans and organizes webinars to promote project management concepts, the PMI Dallas Chapter and chapter events.

Accomplishments 2013

- Completed two webinars and posted three for viewing **"Awesome Abstracts"**

  100 registered, over 60% attendance (69% at peak)

  Increased chapter abstract submissions for Symposium

http://utd.adobeconnect.com/p2jhszqdzu3/

- **"3-Minute Symposium Previews"**

  84 registered

  Speaker benefits (publicity, feedback, practice)

  http://pmi.adobeconnect.com/p76szox2wh8/

- **"PgMP"** (posted Jan 2013)

  772 views to date

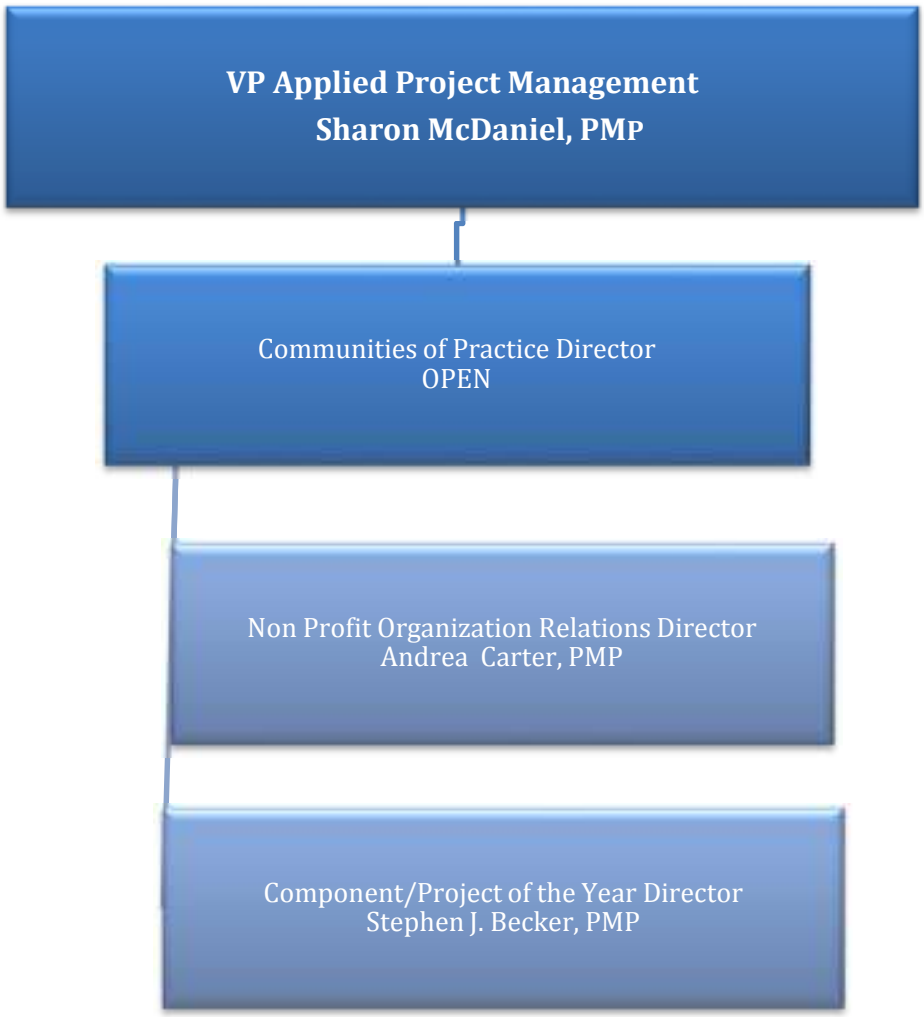
  https://www.youtube.com/watch?v=DwFStXD6KMs

Vendor Promotions Team

The Vendor Promotions coordinates with vendors to promote project management classes and events for PMI Dallas Chapter members.

Accomplishments 2013

Promoted six vendor educational events - exceeded net profit target by 25%


VP Applied Project Management
Sharon McDaniel, PMP
Communities of Practice Director
OPEN
Non Profit Organization Relations Director
Andrea Carter, PMP
Component/Project of the Year Director
Stephen J. Becker, PMP

Applied Project Management

The Applied Project Management Project Teams worked diligently to accomplish strategic goals set by the Board of Directors for 2013.

One of the teams under Applied Project Management is the Non Profit (NP) Team. The purpose of the NP team is to engage the nonprofit community and to bring awareness on the discipline of project management.

The NP team had the primary goal to engage in three nonprofit community outreaches. One of the organizations that the NP team partnered with was Zebra PHriends. Zebra PHriends is a nonprofit organization that brings awareness to pulmonary heart disease. The main event for Zebra PHriends is its annual 5k-1m walk\run fundraiser. Each year the leadership team of Zebra Phriends has managed to excel in bringing awareness to the Dallas\ Ft. Worth metroplex and increase donations to the national research and development fund. Secondly, the NP team partnered with 'McKinney Make a Difference Day'. 'McKinney Make a Difference Day' is organized by the city of McKinney to bring awareness to nonprofit business in the McKinney community. The 2013 event consisted of 15 small projects. Each project was led by a nonprofit leader and a Dallas Chapter PM. Thirdly, the NP team partnered with 'Dallas Give Camp'. 'Dallas Give Camp' is a nonprofit organization that assists companies with IT project management. The Dallas Chapter had 20 PMs participating in this event.

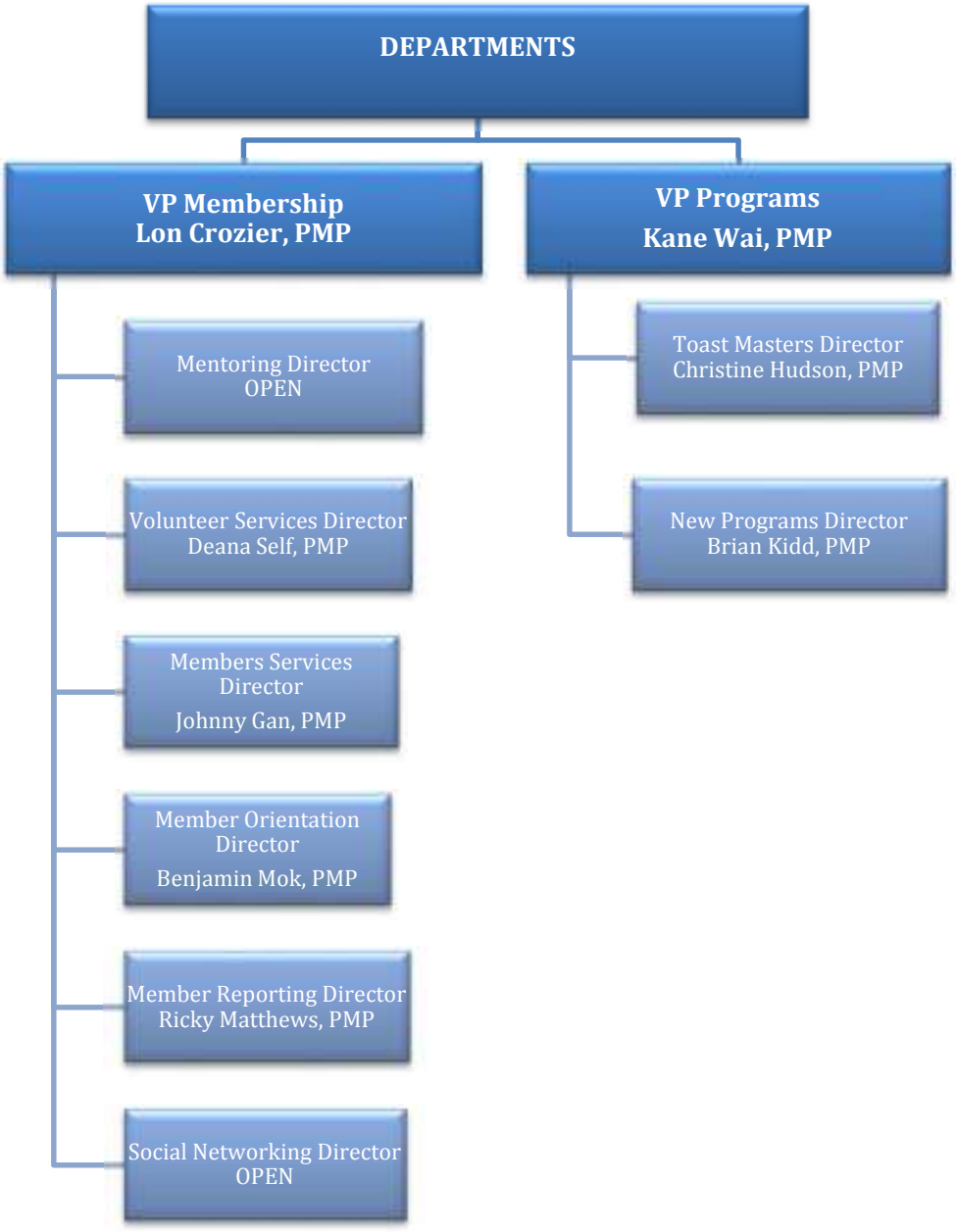
The CoP team had three initiatives for 2013. The first initiative was the engagement of CoPs' leaders with the Dallas Chapter. One relationship that was established was with the national Consultants CoP. The second initiative was hosting networking session at selected dinner meetings. The networking sessions are basically informational. They inform members of the latest development in the Communities of Practice world. The last initiative is the ongoing agile meetings. The agile group meets at least once a month with the Chapter members and other professional agile groups. The meetings average around a 100 attendees.

The Component/Project of Year (C/PoTY) team is a special team of project managers that focus on international projects submissions. The C/PoTY project team has two international level submissions a year. The Chapter was recognized by PMI Global Congress for 'The Project of the Year' submission which was on the George Bush Presidential Center.

The team is also responsible for the Chapter year end reporting which was successfully submitted by the team. The C/PoTY team successfully met their goals for 2013.

Departments




DEPARTMENTS
VP Membership
Lon Crozier, PMP
VP Programs
Kane Wai, PMP
Mentoring Director
OPEN
Volunteer Services Director
Deana Self, PMP
Members Services Director
Johnny Gan, PMP
Member Orientation Director
Benjamin Mok, PMP
Member Reporting Director
Ricky Matthews, PMP
Social Networking Director
OPEN
Toast Masters Director
Christine Hudson, PMP
New Programs Director
Brian Kidd, PMP

DALLAS CHAPTER



PMI Dallas Chapter

P.O.Box 251231

Plano Texas, 75025

PMI Dallas COTY Project Team

Sharon McDaniel,PMP

Shailaja Suresh,PMP

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