



**Project Management Institute  
Mid-Missouri Chapter, Inc.**

**2017 Annual Report  
Prepared on 6/23/2018**



## 2017 Annual Report

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## **2017 Annual Report**

### **II. PRESIDENT'S MESSAGE**

*It's exciting to review the past year and see the progress that was accomplished in our chapter! Our strategic goals for 2017 focused on improving our administrative processes and applying several changes to the structure of our quarterly chapter meetings. These changes and other successes are described in this report.*

*We had 25 members who volunteered their skills in helping to offer programs and services during 2017. Through the efforts of these volunteers, our chapter has accomplished amazing results. This report contains the details about the outcome of our activities and the resources involved to deliver them. If you want to be part of the volunteer team that continues to move the chapter forward in 2018, just let us know!*

***Tony Lutz, PMP***

***PMI Mid-Missouri Chapter President***

***June 2018***



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### III. CHAPTER HISTORY

The PMI Mid-Missouri Chapter became an officially chartered component of the Project Management Institute on June 22, 2000 and was publicly recognized as a member organization by PMI in September 2001. 2017 was the chapter's 16th year of operation.

As stated in the Chapter's bylaws, the PMI Mid-Missouri Chapter has been founded as a non-profit, tax exempt corporation chartered by PMI®. The Chapter is registered in the State of Missouri as a 501(c)(6) corporation, and is dedicated to advancing the practice, science, and profession of project management in a conscious and proactive manner.

Our charter outlines the purposes of the Mid-Missouri Chapter, which include the following:

- Promote professionalism in Project Management.
- Provide a forum for the free exchange of Project Management knowledge, ideas, and experiences.
- Provide a unifying influence on the advancement of Project Management with emphasis on all aspects of planning, scheduling, and control of project-oriented tasks.
- Conduct meetings, seminars and other activities that support the above.

Any revenues the Chapter realizes are reinvested in services and activities to serve the Chapter's membership.

### IV. CHAPTER GOVERNANCE

We operate according to the Chapter Bylaws, as required by PMI and established by our membership. Along with the Bylaws, we have a Chapter Manual in place that provides additional guidance as well as policies and procedures. The Bylaws were updated and ratified by chapter membership in August 2017. As a result of these approved by-laws, the chapter's board of directors will now include a new Vice President of Volunteers position.

The first election to fill this position will be held during July 2018 chapter elections. We are excited to formally attend to inclusion of volunteer members through this addition to the board.

The chapter's bylaws may be referenced from the chapter website at [www.pmimidmo.org](http://www.pmimidmo.org).

#### A. CHAPTER VISION

Within the Mid-Missouri area, organizations will embrace, value, and utilize project management and attribute their success to it.

#### B. CHAPTER MISSION

Advance our members' project management skills and competence, and foster the use of project management in organizations.

#### C. CHAPTER POLICIES

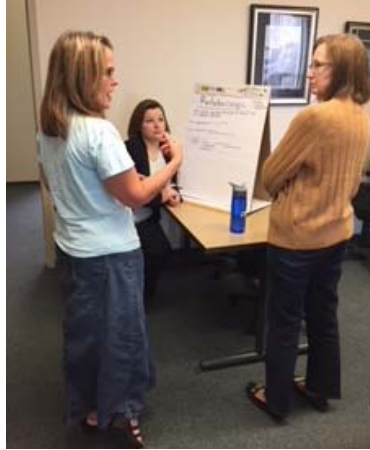
The Board of Directors focused significant effort in 2017 on developing comprehensive policies and procedures to enable chapter continuity and organization. This is a living document that will continue to grow and change as needed to support the chapter's activities and guiding practices.

The Policies and Procedures Manual can be obtained by request to the Vice President of Administration at [pmivpadmin@pmimidmo.org](mailto:pmivpadmin@pmimidmo.org).

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### D. STRATEGIC PLANNING

Each year our Board sets aside time to evaluate current and past activities and to identify areas that need to be addressed in the next year to help the chapter grow and improve. Board members attended a full-day planning session on Saturday,



November 4, 2017 to develop next year's plan. This planning was co-facilitated by three project managers from IBM: Christina Hartman, Kay Moss, and Nick Bavaro. The following board members and guests participated in this strategic planning session:

- Rodney Britt, PMP (VP Finance)
- Geraldine Brooks, PMP (VP Programs)
- Suzanne Carlisle, PMP (VP Professional Development)
- Rhonda Haake, PMP, PMI-ACP (President and First VP Elect)
- Tony Lutz, (First VP / VP Marketing and President Elect)
- Larry Seneker, PMP (VP Communications)
- Liz Lea, PMP (VP Administration)
- Christine Steele, PMP (Social Media Coordinator)

Through the strategic planning session, the Board identified goals and strategies to continue moving the chapter forward in its services, member involvement, and



support to the project management profession. In subsequent meetings, the Board outlined actions that should be taken or considered, prioritized, and assigned a lead. The

Strategic Action Items will continue to be reviewed and tracked throughout the year to track and record progress

toward our goals. These goals and strategies are presented below.

## 2018 Goals and Strategies

### Goal 1

**Offer a variety of purposeful education to meet individuals' unique needs.**

#### Strategies:

- 1 – Offer 46 or more PDUs as balanced Talent Triangle
- 2 – Survey members twice in 2018 to identify what brings value to educational offerings

### Goal 2

**Offer individuals networking opportunities to connect and build meaningful relationships.**

#### Strategies:

- 1 – Plan and hold events to promote and increase individual interaction by 10% of participants per event type.
- 2 – Increase social media presence by 75% of participants.

### Goal 3

**Provide a variety of purposeful and fun volunteer opportunities.**

#### Strategies:

- 1 – Gain a volunteer to support each board member.
- 2 – Obtain 5 volunteers to support the PDD Event.
- 3 – Direct contact to members for volunteer needs.



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### V. PMI & REGION 6 INVOLVEMENT

The PMI Mid-Missouri Chapter is one of four PMI chapters in Missouri, along with Metro St. Louis PMI, Kansas City Mid-America Chapter, and the PMI Southwest Missouri Chapter. We are also an active member of PMI's Region 6, along with approximately 24 other PMI chapters ranging in size from less than 100 to thousands of members. These affiliations provide us with many excellent ideas and a great support system to help us succeed as a chapter.

In fact, PMI Region 6 has devoted significant effort in the past few years to establish a program called No Chapter Left Behind. Through this program, the chapters in Region 6 share financial support in helping smaller chapters such as ours send representatives to the annual PMI Region 6 Conference and PMI Leadership Conference. That financial support enabled us to send the following board members to these two conferences in 2017.

- May 5-7 - Region 6 Conference, San Antonio attended by Suzanne Carlisle, VP Professional Development and Rhonda Haake, President
- October 20-23 – PMI LIM, Chicago, IL attended by Tony Lutz, First VP / VP Marketing and President-Elect

Our ability to participate in these conferences provides a direct benefit to the chapter. Through exposure to many topics that are specifically geared to chapter leaders, our attendees increase their understanding of their roles in serving our chapter members, and they come away with fresh and new ideas that we can incorporate into our chapter activities. In addition, contacts are made through networking with other chapter leaders who are performing the same work and have learned many valuable lessons that they are more than willing to share. Improvements that are made within our chapter during the year are often a direct result of attending regional and

national PMI conferences, and we appreciate the assistance available from PMI and Region 6 in helping us participate in larger numbers despite our more limited budget.

In 2017 we were invited to present a breakout session at the Region 6 Leadership Conference held in San Antonio. This was a wonderful opportunity to gather details about our new strategies and the results of changes incorporated into our chapter's professional development programs. The presentation was well received during the breakout session and when fielding questions during the conference closeout overview session.



### VI. MARKETING STRATEGY

Marketing items purchased in 2016 continued to be distributed at chapter events and were packaged into special prize bags for attendees of the PM Challenge Series throughout the year and the PMO Forum Network held in December.

### VII. FINANCIAL SUMMARY

Chapter income and expenses are organized for planning and tracking purposes in three major categories:

- General – Amounts not related to chapter meetings or professional development events
- Chapter Meetings – Amounts pertaining to chapter meetings
- Professional Development Events – Amounts pertaining to professional development workshops and PMI certification exam preparation webinars



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A summary of 2017 income and expenses in these three categories is provided below through reports of profit & loss statements and total assets.

### A. PROFIT & LOSS STATEMENT FOR 2017

It was an exciting year for the chapter's finances, as no event came in with budgetary loss. This was a great turnaround after the losses experienced in 2016 due to low attendance of chapter workshops and meetings. The chart below presents the budget categories for 2017 compared to 2016.

### 2016

Category	Income	Expenses	Difference
General	\$ 8,512.49	\$ 10,641.17	(\$ 2,128.68)
Chapter Meetings	\$ 800.00	\$ 1,751.98	(\$ 951.98)
Professional Development	\$13,700.00	\$ 14,895.63	(\$ 1,195.63)
Total	\$23,092.49	\$ 27,288.78	(\$ 4,196.29)

### 2017

Category	Income	Expenses	Difference
General	\$ 7,700.45	\$ 8,418.41	(\$ 717.96)
Chapter Meetings	\$ 754.00	\$ 449.28	\$ 304.72
Professional Development	\$25,970.00	\$ 19,189.80	\$ 6,780.20
Total	\$34,424.45	\$ 28,057.49	\$ 6,366.96

Offering the PMI certification preparation online webinar courses in 2017 resulted in not only additional members ready to sit for – and pass - the exams, but our arrangement with Velociteach enabled us to increase income without any additional outlay of expenses or support time. Both PMP and PMI-ACP certification courses were taken by members, bringing in \$468.60 (PMP) and \$512.10 (PMI-ACP) profits to the chapter.

### B. TOTAL CHAPTER ASSETS

Our end of year assets from 2010 – 2017 are presented in the table below. The chapter has no liabilities.

Year Ending	Total Assets
Dec. 31, 2017	\$22,771.60
Dec. 31, 2016	\$16,413.64
Dec. 31, 2015	\$20,559.93
Dec. 31, 2014	\$17,025.44
Dec. 31, 2013	\$18,177.85
Dec. 31, 2012	\$25,423.57
Dec. 31, 2011	\$18,630.44
Dec. 31, 2010	\$18,362.85

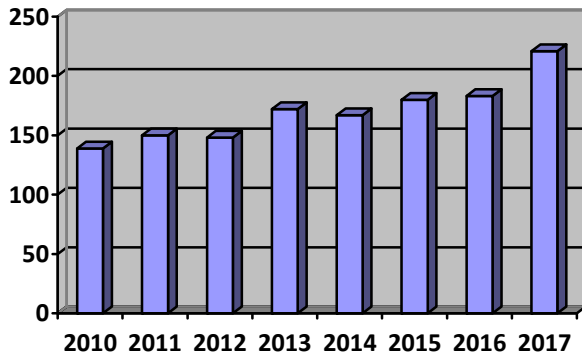
## VIII. MEMBERSHIP SUMMARY

We are pleased to have continued membership growth over the past 7 years, from 139 in 2010 to 183 at the end of 2016, and jumping even further to 221 in 2017. This translates to a 60% growth over the past 7 years, as shown in the graph below.



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Members



In addition to the growth in overall members during these years, our members' PMI certifications have increased. In 2010 PMI reported 93 out of 139, or 68% of our membership, had earned PMI certifications. At the end of 2017, PMI certifications including PMP, CAPM, PMI-ACP, RMP, and PBA totaled 184 across 221 members, or 83% of current membership.

Another important factor that demonstrates the strength of the Mid-Missouri Chapter is the chapter's retention rate. In 2017, our retention rate as reported by PMI was 79%, a slight increase over 2016. Retention rate is based on PMI's formula:

$$\frac{\text{(non renewals – late renewals)}}{\text{memberships at beginning of the year}}$$

This means that 79% of our members stay on as members from one year to the next. We appreciate the fact that members see value in participating in our chapter, which in turn encourages chapter leadership to strive for even more value offerings.

### IX. CHAPTER EVENTS AND PROGRAMS

The Mid-Missouri Chapter is a PMI Registered Education Provider. This enables the Chapter's program offerings to qualify for certified professionals to earn Professional Development Units (PDUs) by attending our events. Since

2010, we have consistently offered core types of programs, including professional development workshops, chapter meetings, a member networking forum, and a chapter volunteer recognition event. In 2016 we introduced a book club that has proven popular and continues to be offered. To summarize, the programs made available to members during 2017 included the following list.

- 3 Professional Development Full-Day Workshops
- 3 Chapter Networking Events
- 1 Annual Volunteer Appreciation
- 6 PMO Forum Network sessions – offered during evenings in Jefferson City
- 7 PM Network sessions – offered during lunch in Columbia
- 3 Book Club meetings

PMI's PDU structure is based on a talent triangle involving Strategic and Business, Leadership, and Technical skills that are necessary for project management professionals to maintain relevant experience and knowledge for today's businesses. Each of our events was categorized using the talent triangle to enable our members to accurately report PDUs within PMI's structure. The table below provides details of the program events that were offered to Mid-Missouri Chapter members during 2017.





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### Summary of Program Events Offered in 2017

Date	Program Type	Title / Presenter / Talent Triangle
2/15/17	JC PMO Forum	Managing Differences with Agile Nicole Safely, Facilitator 1 Technical PDU
2/20/17	Book Club	Death by Meeting Christine Steele, Facilitator 2 Leadership PDUs
3/16/17	Workshop	Project Everest Alan Mallory, Speaker 2 Leadership 3.5 Technical 2.5 Strategic / Business PDUs
3/16/17	Chapter Volunteer Appreciation	Volunteer Appreciation & Recognition Rhonda Haake, Facilitator 1.5 Leadership PDUs
4/19/17	JC PMO Forum	Motivational Mistakes Lori Kleckner, Facilitator 1 Leadership PDU
4/13/17	Book Club	Conflict 101 Christine Steele, Facilitator 1 Leadership 1 Strategic / Business PDUs
4/25/17	PM Network	Organization Productivity Jana Bott, Facilitator .5 Technical .5 Strategic / Business PDUs
5/4/17	Explore PM Series	Explore PM – Chapter Tisha McGowan, Facilitator 2 Strategic / Business PDUs
5/18/17	Workshop	SAFe Scaled Agile Framework John Krewson, Presenter 2 Leadership 3 Technical 3 Strategic / Business PDUs
6/21/17	JC PMO Forum	Earned Value Management John Finley, Speaker 1 Technical PDU
6/29/17	PM Network	Roles and Responsibilities Jana Bott, Facilitator 1 Technical PDU
7/25/17	PM Network	Continuous Improvement Jana Bott, Facilitator .5 Leadership .5 Technical PDUs
8/9/17	JC PMO Forum	Collaboration Lori Kleckner, Facilitator 1 Leadership PDUs
8/26/17	PM Network	Project Roles and Responsibilities

Date	Program Type	Title / Presenter / Talent Triangle
		Jana Bott, Facilitator 1 Technical PDU
9/17/17	Workshop	Football IS Leadership Liz Price, Presenter 2 Leadership 3 Technical 3 Strategic / Business PDUs
9/7/17	Explore PM Series	Explore PMI.org Suzanne Carlisle, Facilitator 1 Leadership 1 Strategic / Business PDUs
9/28/17	PM Network	Business Cases Jana Bott, Facilitator .5 Technical PDU .5 Leadership PDU
10/26/17	Book Club	Rise Christine Steele, Facilitator 2 Leadership PDUs
10/26/17	PM Network	Spooky Stakeholders Jana Bott, Facilitator .5 Leadership .5 Technical PDUs
11/2/17	Explore PM Series	Explore projectmanagement.com Suzanne Carlisle, Facilitator 1 Leadership 1 Technical PDUs
11/16/17	Workshop	PM Soup Doug Boebinger, Speaker 5 Leadership 2 Technical 1 Business / Strategic PDUs
11/16/17	Annual Meeting	Annual Chapter Meeting Rhonda Haake, Speaker 1 Leadership PDU
11/21/17	PM Network	Thankful for Project Managers Jana Bott, Facilitator 1 Leadership PDU
12/20/17	JC PMO Forum	The Gift of Time Management Lori Kleckner, Facilitator 1 Leadership PDU

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### A. CHAPTER WORKSHOPS



A majority of the cost and effort expended within our chapter is consumed in providing professional development workshops to help our members maintain their certifications through completion of training courses. Attendance of workshops offered over the past 5 years has fluctuated, as shown below.

#### Average Workshop Attendance

2017	24
2016	16
2015	17
2014	23
2013	17
2012	22

The pattern of workshop participation is a regular discussion with the Board of Directors. We continue to evaluate chapter participation, consider the topics presented, the time of year offered, and amount of time allowed for event registrations as factors that we believe have an impact on the number of event attendees. As shown in the table above, adjustments were made in 2017 and as a result attendance at workshops increased. Our challenge will be in maintaining a steady level of



attendance at future workshops, while continuing to adjust as needed to improve overall financial results. Managing the event costs and achieving adequate attendance is important to the financial strength of the chapter; as we experience a negative impact on the chapter's budget when attendance does not reach the break-even point.



### B. PMI CERTIFICATION PREP CLASSES

Our arrangement with Velociteach to offer their live webinar PMI certification preparation courses was successful in 2016 and continued to prove an excellent arrangement for all involved.

### C. VOLUNTEER APPRECIATION & RECOGNITION

The 2017 annual Volunteer Appreciation Event was scheduled in March to recognize and honor our volunteers from the previous year. This event was a fun evening with 21 in attendance. The agenda included social networking, a free meal provided to members who volunteered, and recognition of PDUs awarded for volunteer hours.

In addition, a chapter member was selected by the Board of Directors to be awarded the annual Frank Cox Volunteer of the Year Award. (The Frank Cox Volunteer of the Year Award is named after Frank Cox, a chapter member who dedicated several years to the formation and growth of our chapter and who continues to be a regular participant at chapter events.) The 2016 Frank Cox Volunteer of the Year award was presented to Tisha McGowan. As the recipient of this special award, Tisha was recognized for her service as the Director of Volunteers for the past 2 years. In that role, she has



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been invaluable in helping to identify volunteer positions needed, members who are interested in volunteering, and making the necessary connections to enable the volunteer experience. Our chapter's overall membership participation has increased in large part due to Tisha's self-directed actions, welcoming personality, and attention to details.

A volunteer who served during 2017 will be selected by the Board of Directors and recognized with the Frank Cox Volunteer of the Year during the March 2018 volunteer appreciation event.

### D. PMO FORUM NETWORK – JEFFERSON CITY

The chapter's PMO Forum was established in 2010, and has continued to strengthen in both the networking aspect through multiple topics that draw interest and open conversation, as well as consistent growth in participation. The format of the forum is a casual structure, held at a local coffee shop in Jefferson City. Participants earn 1 PDU for the hour-long program, and are welcome to bring or buy their own meal, keeping the event at no charge to the chapter, and requiring no charge for attendance. These events are scheduled on alternate months when workshops are not offered by the chapter. An average of 8 members attended the Jefferson City Forum events.



We have been fortunate to have a chapter member, Lori Kleckner, who is willing and extremely capable of planning and facilitating the PMO Forum meetings. The consistent attendance by many members, in addition to them often bringing along their coworkers to join the discussions, is a clear sign of Lori's success in making this discussion group successful and of significant value to chapter members.

The popularity of these sessions is evident by the consistent attendance numbers, most of whom attend each PMO Forum session offered throughout the year.

### E. PM NETWORK - COLUMBIA

Beginning in May 2017 a PM Network gathering was provided for the Columbia area each month. The format is similar to what is offered at the Jefferson City PMO Forum Network, but we are targeting those who are available for meeting during lunch in the downtown Columbia area. Once again, we are finding a steady group of attendees, with an average of 12 attending each session. Jana Bott facilitated the discussions, selecting relevant topics that drew interesting discussion and food for thought, and kept drawing in members and their coworkers to participate. We look forward to seeing this group continue to grow.

### F. MILITARY FORUM – FORT LEONARD WOOD

In 2015, a Military Forum was initiated in the Fort Leonard Wood area. This was an exciting and new opportunity, and started off capturing the interest of many local military personnel, with 5 - 9 attendees. However, attendance and local support for the PMI certification both waned in early 2016. Unfortunately, the member who was primarily managing the outreach and conducting exam preparation discussions was transferred in mid-2016 to a different state. This, combined with the military leadership in Fort Leonard Wood area abandoning the requirement for project management certification for internal projects caused us to suspend the Military Forum activities. We continue to welcome any interest in picking up that important outreach to the military within our chapter's area.

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### G. STUDENT MEMBERSHIP PROGRAM

A long-time and dedicated member of the chapter has worked diligently to develop a project management program within a local Jefferson City university. As a tenured professor, Mike Nichols has earned respect and has worked to develop a new project management program to be offered within the Lincoln University curriculum. As one can imagine, this isn't something that is accomplished overnight, and Mike has continued to work within the university system to draw attention to this possibility, using information available from PMI and the chapter to provide the background information. We continue to offer support in this effort, and eagerly wait for this work to pay off with a new set of courses being offered as a Project Management degree.

We have recognized a potential for student program growth through other chapter members working as professors in the local University of Missouri – Columbia as well as the University of Missouri – Rolla campus. We continue to seek an interested volunteer to help bring these potential new student opportunities to life.

### H. CHAPTER NETWORKING MEETINGS

The Chapter has typically held a business meeting and 1-hour presentation immediately following scheduled professional development workshops. However, we have seen attendance at these meetings continue drop over the past few years, resulting in net loss to the chapter.

A major goal of the 2017 Strategic Plan was to make changes to the chapter meetings structure. We accomplished that goal by changing everything about the meeting – separate dates, new and



free venues, no formal presentations, increased to 2 hours/2 PDUs, and adopted a game-style format that was extremely interactive and encouraged networking throughout the events. Three chapter meetings in 2017 were devoted to this new format and called Explore PM Series.



Attendance was consistent with previous recent years, at average of 11 attending. The energy level at these events was high, interaction among attendees was excellent; everyone learned more about the subjects of Explore PM – PMI.org, PMIMidMo.org, and projectmanagement.com. Because of these changes and the venue change that reduced the event costs, this series and the overall adjustment in chapter meeting structure was considered a great success. Similar format is planned for 2018.

### I. CHAPTER ANNUAL MEETING

Another adjustment that was made during 2017 was in the timing of the chapter's annual meeting. Normally offered as a 1-hour event following the September or November workshop, this meeting was instead incorporated into the lunch break at the November workshop. Attendees of the workshop as well as others who wanted to attend the meeting were included. Chapter information was presented, elections results announced, financial report provided, board members introduced, and announcements of upcoming plans were shared. Response to this adjustment was positive, and again the chapter gained by reducing extra costs



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normally incurred to provide the annual chapter meeting.

### J. SUMMARY OF EVENTS PARTICIPATION

In recent years, the Board has performed an analysis of our events in order to address the overall decline in meeting attendance. During 2015-2016, our average chapter membership has been 185. We found that 128 different individuals participated in our events, with 50% attending 1 event during the year and 50% attending more than 1 event. With that understanding, we then looked further at the types of events that drew more attendance.

Our analysis confirmed that a majority of our participants take part in the forums and book clubs, which are offered at no cost to the individual. Our goal in 2017 was to change things up and offer a greater variety of events, as described in the details presented in this report. A major effort is being made to schedule events earlier and provide more advance notice for registration. Through the combination of all of these changes implemented in 2016 and throughout 2017 and a nice increase in growth, we believe 2017 proved to be an extremely successful year for the chapter.

The Board of Directors continues to evaluate the topics offered, speakers, and any adjustments that can be made to provide quality, relevant programs for our Chapter members. In the coming year we are planning new formats and topics that we hope will draw chapter members and non-members to take advantage of professional project management training and networking opportunities offered through participation in our chapter events.

### X. CHAPTER COMMUNICATIONS

Our Chapter's communication team, led in 2017 by Larry Seneker as the Vice President of Communications, is responsible for publishing the online newsletter, maintaining the chapter website ([www.pmimidmo.org](http://www.pmimidmo.org)), and managing the event registration system. Larry also worked closely with Proteon representatives to support our website structure and content in 2017.

Our newsletter publication schedule has been consistent, with 6 newsletters issued during the year. Bi-monthly newsletter publications were posted on our website for the following months:

Jan-Feb 2017	May-Jun 2017	Sep-Oct 2017
Mar-Apr 2017	Jul-Aug 2017	Nov-Dec 2017

Each newsletter features a mixture of chapter business and events, recognition of new and renewing chapter members, project management-related articles of interest, sponsor notices, and information from the PMI community across Missouri's 4 chapters. We also include summaries of workshops and events held during the year as another tool for sharing what's going on and encouraging member participation in the future.

### XI. CHAPTER VOLUNTEERS

During 2017, 25 of our members participated as volunteers, which is 11% of our membership. This group of volunteers was made up of both board members and individuals who offered to serve for a specific need during the year. The following information describes the volunteer roles.



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### A. 2017 BOARD OF DIRECTORS

These individuals served on the PMI Mid-Missouri Chapter's 2016 Board of Directors.

- Rhonda Haake, PMP, PMI-ACP / President
- Tony Lutz, PMP/ First Vice-President and Vice-President of Marketing
- Larry Seneker, PMP / Vice-President of Communications
- Rodney Britt, PMP/ Vice-President of Financial Affairs
- Suzanne Carlisle, PMP/ Vice-President of Professional Development
- Liz Lea, PMP/ Vice-President of Administration
- Geraldine Brooks Walton, PMP/ Vice-President of Programs
- Karen Lister / Vice-President of Membership

### B. 2017 VOLUNTEERS

As is true throughout the PMI organization, volunteers are the key to achieving our chapter's goals and objectives. In addition to the volunteers who served on the Board of Directors, the individuals listed below also served the Chapter in some specific capacity during 2017, helping to further our mission and offer great programs to our membership.

Volunteer	Position/Activity
Samantha Cook, PMP	Event Assistant
Wale Ibityre, PMP	Event Assistant
Robin Starr , PMP	Elections Nominating Chair
Heidi Snelling, PMP	Financial Support
Katelyn Botts, PMP, PMI-ACP	Administration Support
Jana Bott, PMP	Columbia PM Network Facilitator
Leonard Kellogg, PMP	Columbia PM Network Coordinator
Rashmi Niak, PMP	Event Statistician
Christine Steele, PMP	Social Media Editor
Mike Nichols, PMP	Student Outreach Coordinator
Christine Steele, PMP	Book Club Coordinator
Christine Hartman, PMP, PMI-ACP	Director of Volunteers and Strategic Planning Facilitator
Victoria Harding, PMP	PM Network Coordinator
Kay Moss	Strategic Planning Facilitator
Nick Bavaro	Strategic Planning Facilitator

Volunteer	Position/Activity
Tisha McGowan, PMP	Director of Volunteers
Lori Kleckner, PMP	PMO Forum Network Coordinator
Nancy Kuse, PMP	Newsletter Editor

During 2017, volunteers represented 11% of the chapter's membership. One of our ongoing challenges and goals of the chapter's leadership is to increase volunteer opportunities. Our Director of Volunteers leads this effort



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by helping identify members who want to volunteer, and matching them up to work that will best suit their interests and also the chapter. A volunteer application format is used to both advertise for positions and obtain information for the volunteers needed. This tool, combined with preparations by the Director of Volunteer, are proving to be valuable to the chapter in achieving volunteer growth, which continues to be an important goal in maintaining a strong chapter.

Through the ratification of chapter bylaws completed in August 2017, a new board member role was established to convert the Director of Volunteers to a voting member of the board. This role will be part of the election process in 2018 to formally elect a volunteer to serve the first 2-year term as Vice-President of Volunteers beginning in January 2019 through December 2020. We look forward to the continued efforts of this role in helping us involve members by providing information and actively encouraging members to volunteer.

### XII. 2017 ELECTIONS

Four board positions were up for election for the 2018-2019 term, including Vice-President of Finance, Vice-President of Membership, Vice-President of Professional Development, and Vice-President of Communication.

Results of the election for 2018-2019 Board of Directors were announced at the Chapter's annual meeting held on November 17, 2017. The following individuals were elected to serve two-year terms beginning January 1, 2018 through December 31, 2019.

- Tony Lutz, President
- Rhonda Haake, First Vice-President / Vice-President of Marketing
- Geraldine Brooks, Vice-President of Programs
- Katelyn Botts, Vice-President of Administration

With the election completed in August, these future board members actively began the process of knowledge transfer, meeting with the current Vice-President, attending board meetings scheduled October through December, and participating in the strategic planning session to help establish 2018's goals and strategic direction.

The 2018 PMI Mid-Missouri Chapter's Board of Directors is presented in the following table. These individuals have committed to serving the chapter by fulfilling their leadership roles to the best of their abilities.

Board Position	Name
President	Tony Lutz, PMP
First Vice President and Vice-President Marketing	Rhonda Haake, PMP, PMI-ACP
Vice-President Finance	Rodney Britt, PMP
Vice-President Administration	Katelyn Botts, PMP, PMI-ACP
Vice-President Communications	Larry Seneker, PMP
Vice-President Membership	Karen Lister
Vice-President Programs	Geraldine Brooks Walton, PMP
Vice-President Professional Development	Suzanne Carlisle, PMP

### XIII. BUSINESS SPONSORS

Keeping in mind the chapter's limited funds, the Board of Directors continues efforts to align companies with event and chapter sponsorship options. Our sponsorship policy offers a variety of sponsorship levels for interested organizations, including Gold, Silver, Bronze, and Copper. The option that seems to be best suited to businesses in our area is what we refer to as





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the Copper Level, which does not involve cash or check payment by the sponsor, but provides valuable support in other ways. Three sponsors have provided this level of support to the chapter in 2017, and a third sponsor provided Bronze level support through newsletter publications. Details of these sponsors and their valuable contribution is included below.



- Bronze Level - The Mathis Group sponsors our chapter through announcement of their extensive list of project management and certification preparation seminars offered in Missouri. Information about their upcoming seminars is included in each published chapter newsletter.



- Copper Level - Huber & Associates provided meeting space, internet connectivity, and conference phone for the monthly chapter board meetings held in Jefferson City.



- Copper Level - RKV Technologies, Inc. provided administrative support for the chapter with use of copy machine, fax, and office supplies as needed, and meeting space for meetings as needed.



- Copper Level – Veterans United Home Loans provided meeting space and refreshments for the chapter book club meetings and the networking events.

We formally recognize our sponsors at each chapter meeting, and greatly appreciate their assistance to our chapter, helping reduce administrative costs in offering programs and supporting the board of directors planning meetings each month.

We continue to seek additional sponsors at every possible opportunity. An approach we've taken over the last couple years is attempting to partner with companies who have several employees that would participate in one of our events. Our desire is to reduce the venue cost, which is significant expense when we must use a hotel or convention area for the room. Where possible, we have arranged with an employer to host the event, saving in the overall cost to the chapter. We continue to seek similar companies to partner with in this way.

### XIV. 2017 PMI MEMBER SURVEY

Each year PMI also requests feedback on behalf of the chapter, and makes the responses available for our use in evaluating our services and members' responses. The survey for 2017 was completed in January by 37 members, providing us excellent representation from 17% of our membership.

Of the survey responders, 86% indicated that they were likely to renew chapter membership in 2018. This percentage supports the fact that we have smaller attrition than the average of other chapters. Attrition is a measurement of members who allow their chapter membership to expire, even if they renew PMI membership. Our chapter's 2017 attrition rate was 21% and the regional average rate was 32%. We are pleased that we're able to provide the value our members are seeking! In fact, PMI asked questions concerning overall value of chapter membership, and our average response was 86% in agreement. The region's average response regarding the value of their chapter memberships was 78% in agreement.



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We will continue to analyze and apply the feedback provided by these survey respondents as we develop our 2018 programs, arrange events, encourage volunteerism, and continue to communicate information through the Mid-Missouri Chapter website, social media, and email notifications.

### XV. LOOKING AHEAD TO 2018

The areas of improvement that we have chosen to focus for 2018 will only make us stronger as practitioners and as a chapter. We began in mid-2017 to plan for a new type of event that we will be offering in 2018. An event often referred to as Professional Development Days (PDD) is becoming more and more common across PMI chapters as a single event held over one or more days that offers multiple options, topics, and variety of PDUs for chapter members. We continue to find in discussions with other chapters that the conference-style PDD is very popular and for many chapters has taken the place of offering multiple single-topic workshops throughout the year.

Following the lead and encouragement of other successful chapters, we are going to offer our PDD “Explore the Universe of Project Management” in October 2018. A planning committee began preparations in May 2017 for this first 2-day PDD offered by the Mid-Missouri



Chapter. This will be an exciting opportunity for our chapter to extend our time learning together over two days at the beautiful Tan Tar A Resort in Osage Beach. Next year’s annual report will provide

an overview of the event and what we learn from the experience, especially consideration of repeating a PDD format in the years ahead.

### XVI. CONCLUSION

As we review the 2017 chapter activities and results presented in this report, there are many indicators of the strength of the Mid-Missouri Chapter. We continue to grow in membership, volunteers, and PDUs that we are able to offer for member certifications and renewals. When we gather to participate in an event, our network of project managers is strengthened.

Our chapter leadership has focused a great deal of effort over the last few years to improve chapter governance through development of policies and procedures. In addition, the leadership has focused on challenge strategies and goals that continue to bring positive results to many aspects of the chapter.

We rely on members to participate and offer constructive feedback that helps us align with their needs. While we are a small chapter category in PMI’s structure, we possess great strength through similar goals and cooperation. It is our greatest desire to have you alongside us through the next year and years to come, as volunteers, participants, and supporters of the local Mid-Missouri Chapter.