

PMI BUFFALO CHAPTER

2012-2013 ANNUAL REPORT

Function: President	Accomplishments:
<p>Mark Kwandrans – President</p> <p><u>Elections Committee</u></p> <p>Chris Reed Jim Coleman Dick Donovan</p>	<ul style="list-style-type: none"> - The leadership team started the year by updating their strategic planning documents. We had created the position of VP of Marketing and Communication, and some of our strategic planning time was spent ensuring there was tight coordination between the operational VPs (Finance, Technology & Business Services, and Marketing & Communication) and the three functional VPs (Membership, Professional Development, Outreach). - Over the course of the fall, the Board continued its planning cycle, eventually creating operational plans and budgets for the program year. - In October, the Board traveled to the North American Leadership Institute Meeting, a gathering of 1,000 leaders from PMI Chapters and Communities of Practice from around the world. We participated in workshops that helped us see what other components had to offer and made many new contacts. - In the Spring, the Board transitioned to new Key Objectives. Our original three Key Objectives had been developed in 2008. We now recognized that the scope of Chapter went beyond our previously satisfactory Objectives. We voted to adopt the eight Objectives listed in PMI's Strategic Plan. Having these eight goals as our Objectives would ensure that all of our activities, whether back office processes, membership efforts, or professional development classes, would align with the goals of PMI.
Function: Finance	Accomplishments:
<p>Pat Walsh – VP</p>	<ul style="list-style-type: none"> - Our QuickBooks online accounting software is working on well for the organization by offering us greater functionality and visibility / reporting features for Board members. We have also consolidated and simplified our chart of accounts which made our budgeting process much easier during FY13. Overall we've received very positive feedback from Board members, Directors and Volunteers regarding timely processing of expense checks, etc. New PayPal payment processing has greatly reduced our transaction costs for meeting registration payments and also improved our ability to process refunds to members as needs arise. - We currently have a vacancy in our Finance Director position and we're looking for a key volunteer to jump in and help us in Finance with some specific Operational focus areas that we've identified to pursue - creation of standardized / timely financial reports for Board & members, electronic documentation / organization in Google Docs, financial controls reviewed and updated, reconciliation processes (i.e. PayPal to Registrations), etc. If you or someone that you know is interested please send them my way and we'll chat.

Function: Marketing & Communications	Accomplishments:
<p>Mary Harris – VP</p> <p><u>Communications Team</u> Joanne Wurst – Director Social Media Katie Manetta – Director Member Communications</p> <p><u>Sponsorship Team</u> Darlene Piparo – Director Gary Dahlstrom</p> <p><u>Merchandise</u> Tija Bushnaq – Merchandise Coordinator</p> <p><u>Communications Coordinator</u> Karen Feuerstein</p> <p><u>Corporate Ambassadors</u> Danielle Nucheren, Advance 2000 Svetlana Erman, Building Control Services Linda Edmiston, CTG Liz Englert, HealthNow Karen Feuerstein, HSBC Gina Bucolo, Independent Health John Elie, Inergex Mike Madigan, Invitrogen Jeff Manhardt, M&T Bank Krista Swann, M&T Bank Debra Lyons, Moog Inc. Debbie Murray, Praxair Bob Smering, Praxair Mary Bagley, Rich Products Mary Harris, Servotronics, Inc. Joanne Wurst, Sodexo</p>	<p><u>The Team</u>: The biggest accomplishment this team has done is to create the framework and structure for a new area within the PMI Buffalo Chapter structure by bringing together pieces of processes that were previously scattered throughout the organization (if they existed at all) and creating the Marketing & Communications team. They have also worked to successfully implement a new PMI Buffalo Chapter logo this year into all our Marketing & Communication.</p> <p><u>Communications Team</u>: Providing excellent communication documents including website, e-mails, pre-dinner presentations, newsletters, workshop brochures, event flyers, quarterly newsletter, and continually striving to improve what is produced and create more communication channels for the chapter. Special call-out to Katie Manetta for her creative and entertaining weekly e-mails and to Joanne Wurst for her efforts to increase our social media presence (Facebook “likes” went from 5 to 82 during her tenure) and for her continually efforts to improve the content on our social media sites.</p> <p><u>Sponsorship Team</u>: Darlene and Gary obtained \$3500 in sponsorship money last year for our Fall PDD, and are continuing to work on improving the chapter sponsorship package, including trying to determine what types of benefits sponsors might be looking for. Their efforts help support our different programs in an effort to help keep costs down to our members.</p> <p><u>Merchandise</u>: Tija has created an official Merchandise Coordinator role to help the chapter with logo merchandise, and this year will be introducing merchandise with our new logo.</p> <p><u>Communications Coordinator</u>: Without Karen, all of our Communication efforts would fall short. Karen is our traffic officer – making sure all the different groups within the chapter know what they need to provide, and making sure the Mar/Com team is completing all the tasks we need to do for each event that is held, whether it be notifying our corporate ambassadors, advertising in the Buffalo News, or creating a power-point presentation, she interacts with the team and with the other groups to keep communication flowing in a way that is hopefully seamless to our members!</p> <p><u>Corporate Ambassadors</u>: Our Corporate Ambassador program has been continually redefined over the years, and this past year their numbers have grown from 7 to 23 ambassadors representing 18 companies. Our ambassadors are our connection to the companies they work at. They share information about upcoming events with their co-workers and they provide feedback to the chapter about what we need to do to better serve their coworkers and their company. They are always helpful, courteous, enthusiastic, and a pleasure to work with! This vital role is continuing to expand, and we hope to have representatives from even more companies. This year, an Ambassador dinner meeting was held to show our appreciation for the efforts of this team, as well as to gather their insights on their companies’ needs.</p>

Function: Membership	Accomplishments:
<p>JoAnn Boehm – VP</p> <p><u>Member Services Team</u> Mary Bagley – Director Barney Colon Harshad Desai Jim Pokoj Rick Mueller Carla Baron Erin Keding</p> <p><u>Volunteerism Team</u> Lynn Maher – Director Shirley Jaskier</p> <p><u>Recruitment Team</u> Josh Kleppe - Director</p>	<p><u>Member Services:</u></p> <ul style="list-style-type: none"> - Coordinated June annual meeting and networking event at Burchfield Penney museum - Coordinated October networking event at Lafayette Hotel - Welcomed new members via email and gave logo gift - Developed Orientation powerpoint deck for new members - Collaborated with Marketing team on recognition of new PMPs, new members, chapter anniversaries - President made calls to remind members to renew - VP Membership sent emails to expired members - Distributed “value of membership” flyers at all events - Performed annual member survey - Began surveying 1st year members to obtain feedback on attendance, value, intent to renew, etc. - Posted job opportunities on website - Calculated monthly attrition rates, annual engagement rates - Uploaded PDUs for PMPs for dinner events - Developed and executed iPad giveaway contest to encourage membership renewals - Developed SOPs <p><u>Volunteerism:</u></p> <ul style="list-style-type: none"> - Coordinated April volunteer recognition event at Botanical Gardens - On-boarded new volunteers and tracked on-going efforts - Collaborated with Business Services team on improvements to On-boarding process - Distributed volunteer opportunity flyers at all events - Posted volunteer opportunities on website - Updated and communicated Volunteer Roadmap - Managed Volunteer of Quarter program - Developed and executed new Annual Achievement Award program - Developed SOPs <p><u>Recruitment:</u></p> <ul style="list-style-type: none"> - Collaborated with Marketing team on Volunteer Drive with Olympic theme - Developed overall strategy for recruiting members and volunteers - Prepared volunteer emails to recruit members who did not volunteer in 2012

Function: Outreach	Accomplishments:
<p>Karen Rybak - VP</p> <p><u>Corporate Outreach</u> Janine Aquilina – Director Katie Pheils Don Wynes</p> <p><u>Professional Outreach</u> Tasha Holland – Director</p> <p><u>Community Outreach</u> Nichole Tubiolo – Director</p> <p>PM4NP Team: Andrew Hope Christa Glassman Jim Carlins Joel Yacono Phil Danielson Donna Kaiser Jim Coleman Nancy Mingus</p> <p><u>Educational Outreach</u> Shelly Bush – Director</p> <p><u>Guest Speakers</u> Bob Smering</p>	<p>-The mission of PMI Buffalo’s Outreach program is to increase awareness of the Chapter and the project management profession to outside constituencies. We work with a variety of organizations by encouraging mutual collaborations that give us an opportunity to promote the value of project management in our Western New York corporate, nonprofit, educational and professional communities.</p> <p><u>Corporate Outreach:</u> Currently in phase 1 of planning an effort to understand the strategic needs of program and portfolio managers as well as PMO directors at local companies by establishing executive-level connections through deployment of a PMO Council.</p> <p><u>Community Outreach:</u> Our award-winning Project Management for Nonprofits Program continues to plan for the 2013-14 session, kicking off in September. The program provides a free service to nonprofit employees where they are trained, provided a PMP mentor and receive a project management toolbox of forms and templates.</p> <p><u>Professional Outreach:</u> Works with other professional associations in our community to create mutually beneficial strategic alliances to bring value and knowledge to our members. This year we established a collaboration with InfoTech Niagara, and helped to establish criteria and judge finalists for their new BETA Award for Technology Project Manager of the Year.</p> <p><u>Educational Outreach:</u> Brings project management knowledge and practice to students at all levels to develop the next generation of project management professionals. This year we focused on college-level guest lectures at UB and Canisius College.</p>

Function: Professional Development	Accomplishments:
<p>Tom Wojcik - Vice President</p> <p><u>Professional Development Days</u> Bob Smering - Director Tija Bushnaq Jim Carlins Gary Dahlstrom David Dispenza Liz Englert Svetlana Erman Karen Feuerstein Mary Harris Nelson Paolini Joanne Wurst</p> <p><u>Certification Training</u> Susan Czyrny - Director Al Roskopf - Instructor Coordinator Scott Heigl - Student Coordinator Ted Adams Barbara Balk Alisa Brown Jim Colemon Barbara Cosgrove Melissa Dabb Gary Dahlstrom David Dispenza Richard Donovan Mike Gavlak Mark Gaynor Cheryl Hefferon Tom Hoffman Dave Hunt Joe Kerr Lisa Korn Bob Mazierski Danielle Nathan Dan Roycroft Meg Santonocito Lori Shanley Kimberly Simpson Nichole Tubiolo Heidi Wild</p> <p><u>Events</u> Carrie Myers - Director Amy Dorfer Larry Cobado John Druar JoMarie Poquadeck</p> <p><u>Peer Based Development</u> Melissa Wallace - Breakfast Coordinator</p>	<p><u>Team:</u> Here are some statistics to reflect the 2012 – 13 Chapter year for the Professional Development team: ... 2100 student hours of PMP instruction ... 4507 PDUs for volunteers and attendees available to be claimed ... 38 events and service functions budgeted for delivery ... 3rd straight SOLD OUT Spring PDD ... 10 different venues used for events ... 1 Joint dinner meeting w/ PMI Erie ... 26 PMs passed through the PMI-ACP prep program last May with at least 3 certifications so far this year (contact us if you qualified)</p> <p>AND of special note today 44 fantastic teammates volunteering to help others Cost to the chapter to generate these numbers: \$0. In fact, for this past year the Professional Development team is on track to provide our chapter with 77% of its revenues and 80% of its profits. Professional Development provides funds to the chapter.</p> <p><u>Professional Development Days:</u> Bob Smering leads a very efficient team in the production of the largest events delivered by the Chapter ... Fall and Spring PDD. This past year the Fall PDD session keynote was focused on Leadership while Spring PDD brought in a SOLD OUT attendance to learn how Agile techniques can be applied. Work by the core team continues all year round with support from the extended team added as the day of the Fall PDD nears. With 6 straight PDDs under their belts, the consistency and dedication of the core team are important factors in the level of quality to which we all have now become accustomed in the PDDs. Regular attendance by members from other PMI chapters attests to the regard these events have in the PMI community.</p> <p><u>Certification Training:</u> Attaining PMP certification is one of the prime reasons that people join PMI Buffalo. The training and support that we provide have been leveraged by many of us when we worked on our own certifications. Sue Czyrny assumed the Director position at the start of the 2012-13 chapter year. Experience comes quickly in this job as she now has 3 PMP Prep sessions and 60 students under her belt. Sue is directly assisted by her two coordinators, Al Roskopf for the instructors and Scott Heigl for the students. 350 Instruction hours are needed in total for each session. This year 24 different instructors stepped up to deliver the 30 different classes presented in the 3 sessions. Several volunteered for more than one session.</p> <p>PMI-ACP prep training started late in the 2011-12 chapter year. We partner with GR8PM to deliver their training through our chapter. Our 2012-13 PMI-ACP session is scheduled for May 16-17, 2013.</p> <p><u>Events:</u> Carrie Myers has directed our Events program this year focusing on the monthly dinner meetings. She's organized our last event for a night with the Buffalo Bisons baseball club. A presentation and tour of the ballpark are included along with game tickets and food. Larry Cobado, John Druar, and JoMarie Poquadeck have been interested in a dinner meeting at Holiday Valley for a couple of years. Their personal persistence and effort came to fruition as we held our first joint chapter meeting with PMI Erie in January in the new main lodge.</p>

<p><u>Self-Directed Learning</u> Cheryl Canfield - Director</p>	<p>The PM Toolbelt series of workshops offers 12 different half day opportunities to explore a key project management issue for less than \$100. While we contract with a project management education consultant for the instruction, Amy Dorfer has been our on-site coordinator for each of the sessions.</p> <p><u>Peer Based Development:</u> Melissa Wallace continues to drive the Breakfast Roundtables as our sole coordinator. Those who make the effort to start their day early once per month in a discussion session with their peers have been rewarded. The group of attendees is loyal and growing.</p> <p><u>Self-Directed Learning:</u> Cheryl Canfield directs a new program in Professional Development in 2012-13 ... Self-Directed Learning. She is focusing on the components which project managers use to increase their learning and improve their skills on their own initiative. The first deliverable of the program was the addition to the chapter website which houses the listing of educational components eligible for PDU credit under Section C of the PMI PDU listing. With almost 400 page views in the first 3 months the interest from our members is evident.</p>
<p>Function: Technology & Business Services</p>	<p>Accomplishments:</p>
<p>Jeff Manhardt – VP</p> <p><u>Website Administration</u> David Hunt – Director Brian Harris Jonathan Lang (term ended)</p> <p><u>Application Support</u> Ajay Bhala – Director Pam D’Amico</p> <p><u>Business Services</u> Chris Reed – Director</p>	<p><u>Website Administration:</u> Responsible for placing weekly marketing updates on pmibuffalo.org and general maintenance of most web pages (about us, Career Corner, PM4NP, Resources & Contact us). Also working on new components to better provide information to members on tools to understand the website metrics – Ex: Google Analytics</p> <p><u>Application Support:</u> Responsible for all other systems and applications that our chapter uses to engage members:</p> <ul style="list-style-type: none"> – Volunteer email (Gmail) – Document repository (Google Drive) – Email communication to members (MailChimp) – Survey tool (SurveyMonkey) – And others <p><u>Business Services:</u> Quarterly records audit completed twice since April 2012 using PMI GOC guidelines and PMI Buffalo audit precedence. This work ensures the Buffalo chapter is in compliance and ensures documents are available online for transition & succession planning as well as Board & volunteer collaboration.</p>