



**TO:** All PMI Buffalo Chapter Members and Associates  
**FROM:** JoAnn Boehm, President, Board of Directors, PMI Buffalo Chapter  
**SUBJECT:** 2015 Chapter Operating Results  
**DATE:** February 16, 2016

On behalf of the PMI Buffalo Chapter Board, it is my pleasure to share with you our 2015 Operating Results.

Professional growth and networking opportunities... PDUs for re-certification... professional contacts... staying current with the latest PM practices... these continue to be the top reasons that our members indicate they join the PMI Buffalo Chapter and attend our events. If you chose to attend all of the dinner, networking and professional development events which were offered by our chapter in 2015, you would have earned 37 PDUs. This is more than 1/2 of your 3-year PMP recertification requirement of 60 PDUs. Add in our Agile training opportunities, and you would have earned 63 PDUs. Across all of our programs, we awarded more than 2,800 PDUs to members and associates in 2015!

**In 2015 our Professional Development and Membership teams offered the following programs:**

- **2 Professional Development Day (PDD) Events (7 PDUs each)** - provided education to our members and prospective members at an average cost of \$36/PDU:
  - **Spring 2015 PDD** - our Spring PDD was attended by 113 individuals - our highest Spring attendance to date! Traci Duez led an engaging workshop on the theme of “Breaking Free: Leading the Way”, providing practical, actionable steps to creating new habits and positive self-talk.
  - **Fall 2015 PDD** - had 162 attendees. Our keynote was Judith Umlas, speaking on “Grateful Leadership” and the impacts of being truly thankful for the people we interact with on a daily basis. In the afternoon, we enjoyed hearing from Matthew Enstice, President & CEO of the Buffalo Niagara Medical Campus and Donna Fernandes, President and CEO of the Buffalo Zoo.
- **6 Chapter Dinner Meetings (1-1.5 PDUs each)** - on the latest developments in project management. These meetings attracted 240 attendees at an average cost of \$20/PDU. Topics included a presentation on a Unified Life Cycle, a tour of Harbor Center, Better Project Prioritization with the Lean Canvas, Estimating is NOT Planning, Herding Cats - Project/Program/Portfolio Management Implemented.
- **8 Breakfast meetings (1.5 PDUs each)** - held monthly at various locations around our area. Kudos to those who participated in these self-directed meetings for sharing their experiences to help one another grow professionally!
- **June Annual Business Meeting (1.5 PDUs)** - reviewed 2014-2015 highlights and 2015 plans, and toured the Fontana Boat House, designed by Frank Lloyd Wright.
- **November Networking event (.5 PDU)** - our members and prospective members were able to mingle, enjoy a local brew or two and tour the new Big Ditch Brewing Company in downtown Buffalo.
- **2 PMP Preparation Classes** - held in Winter and Fall with a total of 51 registrants.
- **A PMI-ACP (Agile Certified Professional) Class** - delivered by GR8PM.
- **Agile CSM (Certified Scrum Master) and CSPO (Certified Scrum Product Owner) Classes (14 PDUs each)** - delivered by Agile42.

**Services provided by our Membership and Marketing teams included:**

- **Weekly chapter emails, pre-event presentations and newsletters** with updates on Chapter news, programs and events, new members, membership anniversaries, new certification achievements, volunteer awards, Project of the Year award winner, PM Tips and developments in project/program/portfolio management.
- **Networking Opportunities** prior to each meeting.
- **Job Openings posted on our website.** Many local companies and recruiters ask us to post job opportunities. Have you checked out this website page lately?
- **New Member Welcome emails** with information on our chapter and how to collect a free dinner and welcome gift.
- **Social Media networking** to stay connected with Chapter events and network with other members. Members can join our three Chapter social media networks - LinkedIn, Facebook, and Twitter - by visiting our Chapter website's home page at [www.pmibuffalo.org](http://www.pmibuffalo.org) and selecting the social media icons on the upper left side of the home page.
- **PDU activity logging for Dinner events** was performed on your behalf with PMI Global if you provided your PMI ID number.
- **Volunteer Recognition** was performed through our newsletter Volunteer spotlights, Volunteer of the Quarter awards, Annual Achievement award and Volunteer Recognition dinner at The Foundry.

### **Giving Back to the Community:**

- Once again, our chapter sponsored and assisted in the evaluation of local teams in the Future City Competition. The overall winner in WNY was the Buffalo Alternative School. The PMI award was presented to the Transit Middle school by our VP of Outreach, Adam Almeter, for its application of project management principals to an engineering problem. We also supported the annual golf tournament for WNY Heroes and provided mentorship to Fredonia's ENACTUS team.
- Outreach has been busy establishing and strengthening partnerships with other organizations, including the University at Buffalo. In fact, we recently conducted a 5-day boot camp training session for engineering graduate students interested in learning more about project management and PMI certifications.
- The Board voted to create an education scholarship in 2016 for a deserving project management student. Stay tuned for more details!
- Are you interested in giving back to our community? If so, please email [vp\\_outreach@pmibuffalo.org](mailto:vp_outreach@pmibuffalo.org).

### **Recognizing Our Chapter Volunteers & Sponsors:**

- Once again the amazing efforts of our volunteers allowed us to deliver a variety of quality services and programs to our membership and other associates. In 2015 we were fortunate to have ~100 volunteers. You can earn up to 25 PDUs for "giving back" over your 3-year re-certification period for the PMP, PgMP, PfP and PBA, or up to 12 PDUs for the ACP, RMP and SP. So please consider volunteering alongside your colleagues!
- We were fortunate to receive financial support for our 2015 Fall Professional Development Day from the following organizations: Independent Health (*Premier Sponsor*), CAI's ITMPI (IT Metrics & Productivity Institute) and Praxair.
- In addition to Volunteer of the Quarter awards, our Annual Achievement award was presented to Carrie Myers.

### **Chapter Administration:**

The PMI Buffalo Board continued to focus on the Chapter's sustainability and fiscal stability:

- We held a multi-chapter strategic planning meeting in August 2015 with 3 other chapters: Rochester, NY, Erie, PA and Southwest Ontario, Canada. Annual survey results from both Buffalo and PMI Global were reviewed, and used to reaffirm our key strategies: 1) Deliver & Promote Stakeholder Value; 2) Engage & Recruit Members and Volunteers; and 3) Ensure the Chapter's Sustainability. The session's primary deliverable was a Chapter Scorecard which reflects our strategies, targets and metrics. In Fall, we also developed a new operating plan and budget for 2016.
- We invested in our Board and Directors by sending representatives to both the Regional and North America PMI Leadership Development Meetings. These forums provided us with new ideas and insights as to how to improve our chapter's performance and increase stakeholder value.
- We held our annual elections for the appropriate Board positions.

### **Technology:**

The Chapter was a leader among our peers through the implementation of technology to enable you, our members to interact in new and easier ways and to allow our volunteers to better meet your needs:

- We implemented a member content area to provide you access to premium content for the events you attended.
- We upgraded the website infrastructure to provide an easier platform for volunteers to deliver up-to-date content.
- We implemented Trello & advanced Google applications to improve the effectiveness of our volunteers.

### **Financial Operating Results:**

- The Buffalo PMI Chapter is incorporated under a 501-C6. We continue to be fiscally conservative while also delivering value-added events for our members.
- We had a 21% increase in our Reserve Funds over last year as a result of a plan to retain 1-1.5 years' worth of operating expenses in reserve (per PMI Global targets).
- 2015 expenses were reduced from 2014's through the chapter's commitment to efficiency.
- Annual 990 Tax filings were successfully completed and overall the chapter was in excellent shape financially at 2015's closing.

### **In Summary:**

The PMI Buffalo Chapter strives to deliver high value to you, our stakeholders. We value your membership, and believe that the programs and services we offered last year delivered you benefits, including over \$200 in member discounts to our events. We are always looking for ways to improve, so please share your suggestions with any chapter volunteer.

Thank you for your continued support. We hope to see you at our 2016 events!