



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

**2018 Annual Report
Prepared on 4/7/2019**



2018 Annual Report

I. TABLE OF CONTENTS

Project Management Institute	1
Mid-Missouri Chapter, Inc.	1
2018 Annual Report	1
Prepared on 4/7/2019	1
I. Table of Contents	2
II. President's Message	4
III. Chapter History	5
IV. Chapter Governance	5
A. Chapter Vision	5
B. Chapter Mission	5
C. Chapter Policies	5
D. 2018 Strategic Planning	5
V. PMI & Region 6 Involvement	7
VI. Marketing Strategy	7
VII. Financial Summary	8
A. Profit & Loss Statement for 2018	8
B. Total Chapter Assets	9
VIII. Membership Summary	9
IX. Chapter Events and Programs	9
A. Chapter Workshops	11
B. PMI Certification Prep Classes	12
C. Volunteer Appreciation & Recognition	12
D. PMO Forum Network – Jefferson City	12
E. PM Network - Columbia	13



2018 Annual Report

F.	PM MeetUp – Jefferson City.....	13
G.	Military Program.....	13
H.	Student Outreach Program	13
I.	Annual Chapter Meeting	14
J.	Professional Development Days 2018.....	14
X.	Chapter Communications.....	15
XI.	Chapter Volunteers	15
A.	2018 Board of Directors	15
B.	2018 Volunteers	15
XII.	2018 Elections.....	16
XIII.	Business Sponsors	17
XIV.	Member Surveys	18
XV.	Conclusion.....	18



2018 Annual Report

II. PRESIDENT'S MESSAGE

2018 was another exciting year for the Mid-Missouri Chapter. We offered new networking programs which introduced us to many new faces who join us in the project management profession. In addition, we welcomed new members to our chapter and saw growth in member certifications. To wrap up 2018, we held our first Professional Development Days (PDD) event, which was an overwhelming success! More details about these aspects of 2018 are described in this report.

As you read our annual report, I hope you will be encouraged to become involved in our chapter. We welcome members to step up in volunteer roles that are critical to our plans for 2019 and our continued growth as a chapter. We also welcome those who are not members, and hope you will take the step to officially join our chapter and receive the benefits of being part of our membership!

Tony Lutz, PMP

PMI Mid-Missouri Chapter President

March 2019



2018 Annual Report

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. 2018 was the chapter's 17th 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. The Bylaws were last updated and ratified in 2017. Bylaws are available for reference at our chapter website, <https://pmimidmo.org>.

A. CHAPTER VISION

Our vision is that within the Mid-Missouri area, organizations will embrace, value, and utilize project management and attribute their success to it.

B. CHAPTER MISSION

Our mission is to advance our members' project management skills and competence, and foster the use of project management in organizations.

C. CHAPTER POLICIES

The Board of Directors performs chapter business through guidance available in a set of policies and procedures that 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.

D. 2018 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 3, 2018 to develop next year's plan. This planning was facilitated by a chapter member, Jana Bott. The following board members and guests participated in this strategic planning session:

- Rodney Britt, PMP (VP Finance)
- Geraldine Ciolli, PMP (VP Programs)
- Karen Lister (VP Membership)
- Suzanne Carlisle, PMP (VP Professional Development)



2018 Annual Report

- Rhonda Haake, PMP, PMI-ACP (First VP and VP Marketing)
- Tony Lutz, (President)
- Katelyn Botts, PMP (VP Administration)
- Olivia Vann, (VP Elect – Membership)
- Heidi Saylor (VP Elect – Professional Development)
- Dan Crouch (VP Elect – Volunteers)

Through the strategic planning session, the Board identified goals and strategies for 2019 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.

2019 Goals and Strategies

Goal 1

Increase volunteer participation

Strategies:

- 1 – Building a volunteer playbook
- 2 – Develop a targeted campaign for volunteers
- 3 – Develop clear expectations for volunteer roles

Goal 2

Improve internal chapter processes and tools

Strategies:

- 1 – Develop ways to improve RACI and Event WBS
- 2 – Develop volunteer roles descriptions
- 3 – Create a solid succession plan
- 4 – Continue to review and improve policies and

procedures

- 5 – Continue to compile the document repository

Goal 3

Build an employer outreach campaign

(target 2020)

Strategies:

- 1 – Evaluate non-IT fields that use project management
- 2 – Look for champions inside companies
- 3 – Increase visibility of chapter outside of IT

Goal 4

Offer diverse programs that increase knowledge and network

Strategies:

- 1 – Offer another PDD
- 2 – Assure all knowledge triangle areas are covered in offerings
- 3 – Investigate options for online participation and perform 1 trial (2019)
- 4 – Implement option(s) for online participation (2020)
- 5 – Engage newest generation of workers (Millennials and GenZ's)
- 6 – Expand the Student Outreach Program to other areas
- 7 – Offer more diverse events
- 8 – Evaluate member interests in chapter, topics,



2018 Annual Report

and opportunities

Goal 5

Expand marketing efforts

Strategies:

- 1 – Continue to build on social media options
- 2 – Implement actions to market the chapter
- 3 – Implement actions to market events
- 4 – Dedicate a PDD session on chapter volunteering and board positions

Throughout 2019, the chapter leaders will use these goals and strategies to guide decisions and actions that are taken.

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.

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 larger chapters (with 1500 + members) 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 board members to these two conferences in 2018.

- April - Region 6 Conference at St. Louis, attended by Tony Lutz, President, Katelyn Botts, VP Administration, and Rhonda Haake, First VP and VP of Marketing. Rhonda also made a presentation on behalf of the chapter.
- October – PMI Leadership Institute Management at Los Angeles, attended by Katelyn Botts, VP Administration.

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.

VI. MARKETING STRATEGY

A majority of the marketing effort was focused on the website and email communications announcing chapter events and encouraging participation and registrations.

For several years, we have contributed funds toward the local Computer Professionals on Demand (CPoD) program. This program is offered through cooperation between local companies, State of Missouri, and Missouri Technical College. A 3-day summer camp brings 20 high school students together to give them opportunities to learn about the computer profession and experience how local businesses operate with a



2018 Annual Report

focus on technology. In 2018, our chapter presented a 2-hour session with a hands-on introduction to project management as part of the CPoD curriculum. Not only did this provide exposure to project management as a profession, but we also were able to share information about our chapter and how they can reach out for information.

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

A summary of 2018 income and expenses in these three categories is provided through reports of profit & loss statements and total assets.

A. PROFIT & LOSS STATEMENT FOR 2018

It was another positive financial year for the chapter, as no event came in with budgetary loss. The charts below present the budget categories for 2016, 2017 and 2018 for comparison purposes.

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

2018

Category	Income	Expenses	Difference
General	\$ 10,069.17	\$ 9,792.40	\$ 276.77
Chapter Meetings	\$ 330.00	\$ 123.40	\$ 206.60
Professional Development	\$32,595.90	\$31,694.07	\$ 901.83
Total	\$42,995.07	\$ 41,609.87	\$1,385.20

We continued to partner with Velociteach to offer the PMI certification preparation online webinar courses. This resulted in additional members ready to sit – and pass - the exams, and enabled us to increase income without any additional outlay of expenses or support time. One member took advantage of this training for PMP certification.



2018 Annual Report

B. TOTAL CHAPTER ASSETS

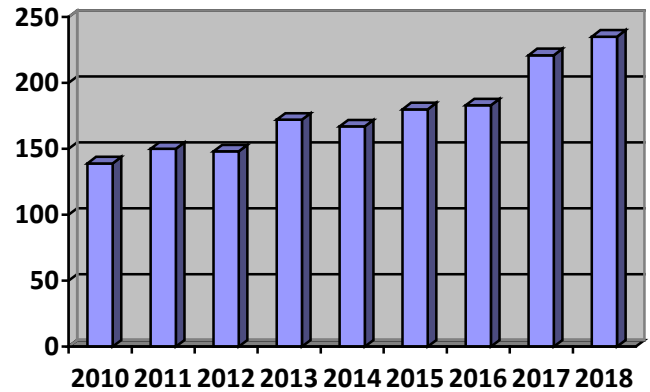
Our end of year assets from 2010 – 2018 are presented in the table below. The chapter has no liabilities.

Year Ending	Total Assets
Dec. 31, 2018	\$24,156.80
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

Chapter membership continued to grow during 2018, further reinforcing our efforts to bring new and exciting events to expand knowledge, sharing, and the project management profession. Membership patterns over the past 8 years are shown in the graph below.

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 2018, PMI certifications including PMP, CAPM, PMI-ACP, RMP, and PBA totaled 202 across 235 members, or 86% of current membership.

Another important factor that demonstrates the strength of the Mid-Missouri Chapter is the chapter's retention rate. In 2018, our retention rate as reported by PMI was 76%, a slight decrease from 79% in 2017. Retention rate is based on PMI's formula:

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

This percentage means that 76% 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

2018 Annual Report

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. Beginning in 2016, we began to make adjustments to the typical format and structure of events that we were offering each year. The adjustments are intended to help us reach a broader set of members and get more members actively involved in the chapter.

In 2018, as a result of annual strategic planning, we continued to make adjustments to the events that we offered. One area of change was adding a 3rd no-cost networking program to the options available for members and guests. In addition, we replaced the typical 4-per-year full-day workshop structure with 1 full-day workshop and a 2-day Professional Development Days conference. The results of these changes are described in further detail below.

To summarize, the programs made available to members during 2018 included the following list.

- 1 Professional Development Full-Day Workshop
- 2 New Member Orientation events
- 1 Annual Chapter Meeting
- 1 Annual Volunteer Appreciation
- 6 PMO Forum Network sessions offered during evenings in Jefferson City
- 7 PM Network sessions offered during lunch in Columbia
- 5 PM Networking sessions offered during lunch in Jefferson City (new program offered)
- 3 Book Club meetings
- 1 Professional Development Days 2-day conference (first time offered)

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 the program events and talent triangle that were offered to Mid-Missouri Chapter members during 2018.



Listing of Program Events Offered in 2018

Date	Program Type	Title / Presenter / Talent Triangle
2/21/18	JC PMO Forum	Death of PMO? Geri Brooks, Facilitator 1 Leadership PDU
3/6/18	Book Club	Alpha Project Managers Cecilia, Facilitator 2 Technical PDUs
3/15/18	Chapter Volunteer Appreciation	Volunteer Appreciation & Recognition Tony Lutz, Presenter 1.5 Leadership PDUs
3/21/18	PM Network	Strategic Projects Jana Bott, Facilitator 1 Strategic PDU
4/18/18	JC PMO Forum	Real PM Stand Up Lori Kleckner, Facilitator 1 Leadership PDU
4/26/18	PM Network	Vendor Management Jana Bott, Facilitator 1 Technical PDU
5/1/18	Orientation	New Member Orientation Board Members Facilitators 1.5 Leadership PDUs
5/17/18	Workshop	From a Good PM to a Great Leader David Barrett, Presenter 4 Technical + 4 Business PDUs
5/31/18	Orientation	New Member Orientation Board Members Facilitators 1.5 Leadership PDUs
5/24/18	PM Network	Transition to Project Closure Jana Bott, Facilitator 1 Technical PDU
6/14/18	Book Club	The Dream Team Nightmare Dan Crouch, Facilitator



2018 Annual Report

Date	Program Type	Title / Presenter / Talent Triangle
		2 Technical PDUs
6/20/18	JC PMO Forum	Agile Project Plan or Oxymoron Lori Kleckner, Facilitator 1 Technical PDU
6/28/18	PM Network	Managing Timeline Jana Bott, Facilitator 1 Technical PDU
7/19/18	PM MeetUp	The New IT Anita Mosley, Facilitator 1 Leadership PDU
7/24/18	Exam Prep	PMP Exam Prep Workshop Velociteach 32 Technical PDUs
7/26/18	PM Network	Managing Up Jana Bott, Facilitator 1 Leadership PDU
8/15/18	PMO Forum	Emotional Intelligence Lori Kleckner, Facilitator 1 Strategic/Business PDU
8/16/18	PM MeetUp	The New IT (Part 2) Anita Mosley, Facilitator 1 Leadership PDU
9/20/18	PM MeetUp	Dev Ops Anita Mosley, Facilitator 1 Technical PDU
9/27/18	PM Network	PMs Predict the Future Jana Bott, Facilitator 1 Leadership PDU
10/4/18	Book Club	The Optimistic Workplace Dan Crouch, Facilitator 1.5 Leadership PDUs
10/18/18	PDD	Exploring the Universe of Project Management Multiple Sessions 6 Leadership, 6 Technical, 8 Strategic/Business PDUs
11/13/18	Meeting	Annual Chapter Meeting Rhonda Haake, Presenter 1 Leadership PDU
11/15/18	PM MeetUp	Automation Testing Anita Mosley, Facilitator 1 Technical PDU
11/29/18	PM Network	Change it Up Jan Bott, Facilitator 1 Strategic/Business PDU
12/12/18	PMO Forum	Gifting Wisdom Lori Kleckner, Facilitator 1 Leadership PDU
12/20/18	PM MeetUp	What is Design Thinking Anita Mosley, Facilitator 1 Strategic/Business PDU

A. CHAPTER WORKSHOPS

A majority of the cost and effort expended within our chapter has historically been consumed in providing professional development workshops to help our members maintain their certifications through completion of training courses. Awareness gained from speaking with other PMI chapters indicates that many chapters are offering professional development through a conference format, bringing in multiple speakers and enabling members to select from the options provided while enabling more networking time with other members. As mentioned earlier, in 2018 we decided to adjust the workshop offering to 1 so we could redirect our efforts on a conference.

The workshop offered in 2018 was well received and well attended. David Barrett is a professional speaker and accustomed to presenting to PMI chapters, so his information was very relevant to our members. We had 25 attend the workshop, with approximately half of that number being chapter members. For comparison, workshop attendance over the past 5 years is shown below.

Average Workshop Attendance

2018	25
2017	24
2016	16
2015	17
2014	23

The pattern of workshop participation continues to be 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

2018 Annual Report

in the table above, after adjustments made in 2017 and 2018, attendance at workshops has increased.

Managing the event costs and achieving adequate attendance is important to the financial strength of the chapter; as we experience a budget impact when attendance does not reach the break-even point. We continue to seek venues that are low-cost or no-cost to help reduce the expenses.



B. PMI CERTIFICATION PREP CLASSES

Our arrangement with Velociteach to offer live webinar PMI certification preparation courses continues to be successful. Even with only 1 member participating in the course in 2018, it has proven to be an excellent arrangement for all involved. We have no cost outlay unless someone registers for a course, and we gain a certified member through the course completion and subsequent successful test.

C. VOLUNTEER APPRECIATION & RECOGNITION

The 2018 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 18 in attendance. The agenda included social networking, a free meal provided to members who volunteered, recognition of PDUs awarded for volunteer hours, along with a gift of appreciation to each volunteer.

Each year a chapter member is 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 2017 Frank Cox Volunteer of the Year award was presented to Christina Steele. As the recipient of this special award, Christina was recognized for her service in some key roles during 2017. She filled in to facilitate book study sessions while the program coordinator was on military service duty. She also worked to get the chapter connected with social media and contributed posts and comments with followers. It was a pleasure to surprise Christina with this unique recognition for her outstanding volunteer service to the chapter.

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 10 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.



2018 Annual Report

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 2017 a PM Network group was provided for the Columbia area each month. The format is similar to what is offered at the Jefferson City PMO Forum Network, but this one targets those who are available for meeting during lunch in the downtown Columbia area. During 2018 we continued to see a steady group of attendees, with an average of 12 (and max of 22) attending the sessions. Jana Bott facilitated discussions, selecting relevant topics that drew interest, offered food for thought, and continues to attract members and their coworkers. We look forward to seeing this group continue to grow.

F. PM MEETUP – JEFFERSON CITY

As a result of the Columbia PM Network sessions, a third networking group was initiated in the Jefferson City area during 2018. The format is similar to what is offered at the PM Network for an opportunity to discuss project management topics during lunch hour. The new Jefferson City networking group meets at a members' employer and enables the employer's employees to carve out time for learning and networking on a regular monthly schedule. The sessions are also open to all chapter members, as well as co-workers who may want to join in. This group was initiated in July 2018, with an average of 13 attending the sessions. Anita Mosley coordinated the sessions, obtained feedback from participants to select relevant topics, and organized the event

information for registration. Steady attendance and growth of this group looks promising into 2019.

G. MILITARY PROGRAM

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. We continue to welcome any interest in picking up that important outreach to the military within our chapter's area, whether in Fort Leonard Wood or another part of the chapter's coverage.

H. STUDENT OUTREACH 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



2018 Annual Report

volunteer to help bring these potential new student opportunities to life.

I. ANNUAL CHAPTER MEETING

The annual chapter meeting was held in November 2018, with 14 in attendance. This event continues to be a challenge to the chapter in finding a good forum for presenting annual information to members such that the expense to deliver this meeting doesn't exceed the income from participants. We were able to obtain free meeting space and meal for the 2018 event thanks to Veterans United Home Loans, an employer in Columbia, making it possible to offer this meeting separately from a workshop or other event without financial loss.

J. PROFESSIONAL DEVELOPMENT DAYS 2018

After much consideration, the Board of Directors decided to offer a 2-day conference in 2018, commonly referred to as Professional Development Days (PDD). Offering a 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 attendees. 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 offered our PDD "Explore the Universe of Project Management" in October 2018. The planning committee began preparations in May 2017 for and worked through the end of 2018 on preparing and finalizing the event.

This proved to be a great success, as our chapter spent time learning together over two days at the beautiful Tan-Tar-A Resort in Osage Beach, Missouri. The event offered 3 keynote speakers and 4 breakout sessions with 3 topics to choose from at each session. In-between those learning opportunities we packed in sessions to learn and practice a variety of networking techniques.



Considering our highest attendance at a workshop over the past several years has been 31, we set our stretch target attendance goal at 100. To our extreme surprise and pleasure, we exceeded that goal with 102 registrations! One of our keynote speakers pointed out that this number is almost 50% of our total membership – quite a successful turnout for our first PDD conference.

We received excellent feedback and learned a lot from the experience with the 2018 PDD. The excitement throughout the 2 days and the interest expressed during our closing session to hold another PDD was overwhelmingly positive. So even though we hadn't originally intended to repeat a PDD right away in 2019, our annual strategic planning resulted in full agreement that we should. So look for another successful PDD in the next year's chapter offerings!

The Board of Directors continues to evaluate the topics offered, speakers, and any adjustments that are necessary to provide quality, relevant programs for our Chapter members. We are learning from other chapters' experiences in addition to our own, and planning to continue making necessary changes that help us better meet members' interests and availability.



2018 Annual Report

X. CHAPTER COMMUNICATIONS

Our Chapter’s communication team, led in 2018 by Larry Seneker as the Vice President of Communications, is responsible for publishing the online newsletter, maintaining the chapter website (www.pmimidmo.org), and managing the event registration system. Larry also worked closely with Proteon representatives to support our website structure and content in 2018.

The 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 2018	May-Jun 2018	Sep-Oct 2018
Mar-Apr 2018	Jul-Aug 2018	Nov-Dec 2018

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 2018, 35 of our members participated as volunteers, which is 15% 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.

A. 2018 BOARD OF DIRECTORS

These individuals served on the PMI Mid-Missouri Chapter’s 2018 Board of Directors.

- Tony Lutz, PMP - President
- Rhonda Haake, PMP, MI-ACP – 1st Vice President & 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
- Katelyn Botts, PMP - Vice-President of Administration
- Geraldine Ciolli, PMP - Vice-President of Programs
- Karen Lister - Vice-President of Membership

B. 2018 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 2018, helping to further our mission and offer great programs to our membership.

Volunteer	Position/Activity
Tammy Barkhoff	PDD Sponsor & Exhibits Coordinator
Rick Bonner	PDD Breakout Session Facilitator
Jana Bott, PMP	Columbia PM Network Facilitator
Lisa Britt	PDD Registration Support



2018 Annual Report

Volunteer	Position/Activity
Dan Crouch, PMP	Book Club Coordinator
Cathy Eatherton	PDD Social Event Coordinator
Nathan Eatherton	PDD Social Event Coordinator
Christina Hartman, PMP/PMI-ACP	Director of Volunteers
Melissa Hill	PDD Venue & Meals Coordinator, PDD Breakout Session Facilitator
Leonard Kellogg, PMP	Columbia PM Network Coordinator
Lori Kleckner, PMP	PMO Forum Network Coordinator
Nancy Kuse, PMP	Newsletter Editor, PDD Registration Support
Liz Lea	PDD Meals Arrangement
Kathy McCulloch	PDD Sponsor Coordinator
Tisha McGowan	PDD Breakout Program Support
Mahesh Mullath	PDD Breakout Session Facilitator
Anita Mosley, PMP	PM MeetUp Coordinator, PDD Breakout Coordinator
Mike Nichols, PMP	Student Outreach Coordinator
Rashmi Naik, PMP	Event Statistician, Website Editor
Robin Starr, PMP	Elections Nominating Chair
Christine Steele, PMP	Social Media Editor, PDD Communications, Book Club Coordinator
Kevin Yanskey	PDD Breakout Session Facilitator
Olivia Vann	PDD Social Event Coordinator
Kevin Yanskey	PDD Registration Support

During 2018, volunteers represented 15% of the chapter's membership. One of our ongoing challenges

and goals of the chapter's leadership is to increase volunteer opportunities. We developed a volunteer application form to both advertise for positions and obtain information for the volunteers needed.

Beginning with 2018 elections, a new board member role is being added as a voting member of the Board of Directors. Dan Crouch was elected to a 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. 2018 ELECTIONS

Five board positions were up for election for the 2019-2020 term, including Financial Affairs, Membership, Professional Development, Communication and the new position of VP of Volunteers.

Results of the election for 2019-2020 Board of Directors were announced at the Chapter's annual meeting held in November 2018. The following individuals were elected to serve two-year terms beginning January 1, 2019 through December 31, 2020.

- John Finley, Financial Affairs
- Heidi Saylor, Professional Development
- Olivia Vann, Membership
- Ben Vegiard, Communication
- Dan Crouch, Volunteers

With the election completed in September, 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 2019's goals and strategic direction.



2018 Annual Report

The complete list of 2019 PMI Mid-Missouri Chapter’s Board of Directors is presented in the following table. These nine 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
Administration	Katelyn Botts, PMP, PMI-ACP
Programs	Geraldine Ciolli, PMP
Finance	John Finley, PMP
1st VP / Marketing	Rhonda Haake, PMP, PMI-ACP
Professional Development	Heidi Saylor, PMP
Membership	Olivia Vann, PMP
Communications	Ben Vegiard, PMP
Volunteers	Dan Crouch, 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 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 2018, and a third sponsor provided Bronze level support through newsletter publications. We also gained two sponsors this year for support of the PDD. 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. We also appreciated the very generous donation RKV made to the PDD Conference by hosting a meal for all conference participants.



Copper Level – Veterans United Home Loans provided meeting space and refreshments for the chapter book club meetings and the networking events, as well as the annual meeting space and meal. In addition, Veterans United donated money for door prizes to be awarded at the PDD Conference.



2018 Annual Report



IIL joined our sponsorship list by providing in-kind support for our PDD, printing the conference materials and signage.

Velociteach

Velociteach is a long-time partner of our chapter, and is a sponsor for this event. Velociteach offers excellent quality courses for certification preparation with the project manager in mind.

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. MEMBER SURVEYS

With every event, we ask attendees to provide us their honest feedback so we can quickly adjust when we miss the expected results. We will continue to analyze and apply the feedback provided by those who participate in our events. In addition, PMI seeks survey responses

from our chapter members each Spring, and makes that information available to us to consider as we develop programs, arrange events, communicate information and encourage volunteerism throughout the chapter. We will continue to apply this information along with lessons learned over the years ahead.

XV. CONCLUSION

As we review the 2018 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're very proud of the success of our first Professional Development Days conference in 2018, and that success has redirected our focus and challenges for the coming year.

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.