

The Minnesota Chapter of the Project Management Institute

2015 Annual Report

Updated 4/28/16

Suzanne M Schanno
President and Chief Executive Officer

Chris Doyle
Community & Outreach Director

Terri Kimball
President-Elect & Chief Operating
Officer

Jerry Gomes
Programs Director

Michael Green
Past President

Rich Walker
Director at Large

Michelle Maas
Finance Director

Julian Johnson
Director at Large

Judy Juhl
Governance Director/Board Secretary

Terri Kimball
President & CEO
president@pmi-mn.org

Chris Doyle
President-Elect & Chief Operating
Officer
presidentelect@pmi-mn.org

Suzanne M. Schanno
Past President
pastpresident@pmi-mn.org

Michelle Maas
Finance Director
directorfinance@pmi-mn.org

Judy Juhl
Governance Director/Board Secretary
directorgovernance@pmi-mn.org

Jerry Gomes
Director at Large
Jerry.Gomes@pmi-mn.org

Rich Walker
Director At Large
Rich.Walker@pmi-mn.org

Julian Johnson
Director At Large
(resigned March 11, 2016)

Alex Wincell
Appointed to fill open Director At Large
Alex.Wincell@pmi-mn.org

Joe Perzel
Director at Large
Joe.Perzel@pmi-mn.org

Joe Perzel
Sponsorships Co-Chairs
Chairsponsorship@pmi-mn.org

Tetiana Sengupta
Volunteers Chair
chairvolunteer@pmi-mn.org

Tom Smith
Community & Outreach Chair
chairoutreach@pmi-mn.org

Michelle Maas
PDD Chair
chairpdd@pmi-mn.org

Mohamed Diab
Membership Chair
chairmembership@pmi-mn.org

Dean Boorman
Marketing & Communications Chair
chairmarcomm@pmi-mn.org

Chuck Stakston
Programs Chair
chairprograms@pmi-mn.org

Deb Morgan
Professional Development Chair
chairprofdev@pmi-mn.org

Hakki Isik
IT Chair
chairit@pmi-mn.org

Denise Pech,
Barbara Brill
Sponsorships & Partners Co-Chair
Chairsponsorship@pmi-mn.org

Alisha Walters
Volunteers Chair
chairvolunteer@pmi-mn.org

Mark Molesworth
Brandon Olson
Community & Outreach Co-Chair
chairoutreach@pmi-mn.org

Rico Mace
Marketing & Communications Chair
chairmarcomm@pmi-mn.org

Mohamed Diab
Membership Chair
chairmembership@pmi-mn.org

Judy Juhl,
Harry Spinks
PDD Co-Chair
chairPDD@pmi-mn.org

Hakki Isik (Jan-April)
Geraldine Anyanwu (Appointed April)
IT Chair
chairit@pmi-mn.org

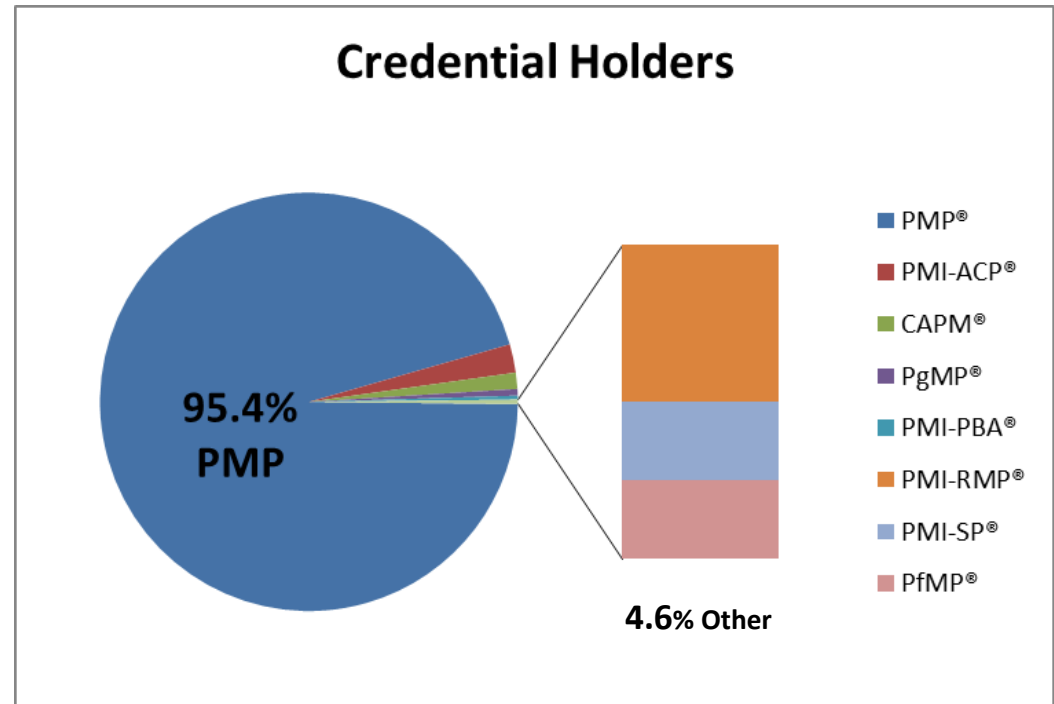
Dianne Petersen
Programs Chair
chairprograms@pmi-mn.org

Brad Casemore
Professional Development Chair
chairprofdev@pmi-mn.org

| Membership Category | Number of Members |
|---------------------|-------------------|
| Renewing Members | 2466 |
| New Members | 831 |
| TOTAL | 3297 |
| Retention Rate | 74.3% |

PMI® offers eight different professional certifications

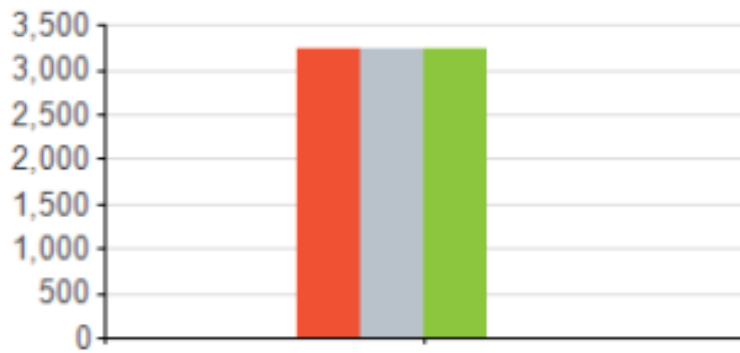
| Credential | Credential Holders |
|--------------|--------------------|
| PMP® | 2,215 |
| PMI-ACP® | 51 |
| CAPM® | 29 |
| PgMP® | 12 |
| PMI-PBA® | 7 |
| PMI-RMP® | 4 |
| PMI-SP® | 2 |
| PfMP® | 2 |
| Total | 2,322 |



There are more than 660,000 professionals with PMI certification worldwide

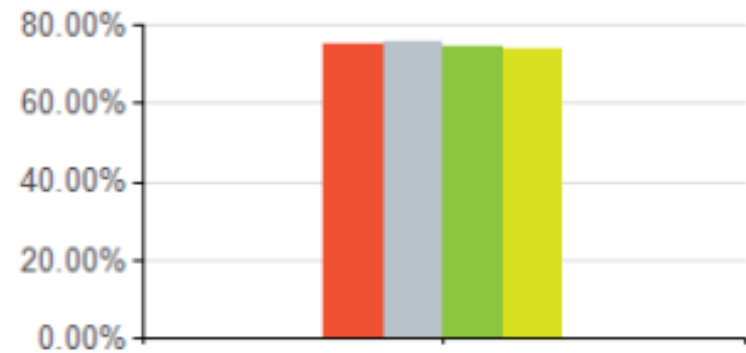
Membership

Membership Count



■ 01/01/2014 ■ 01/01/2016
■ 01/01/2015

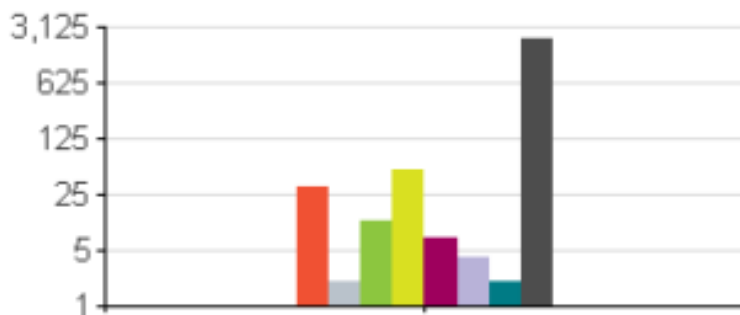
Retention



■ 01/01/2014 ■ 01/01/2016
■ 01/01/2015

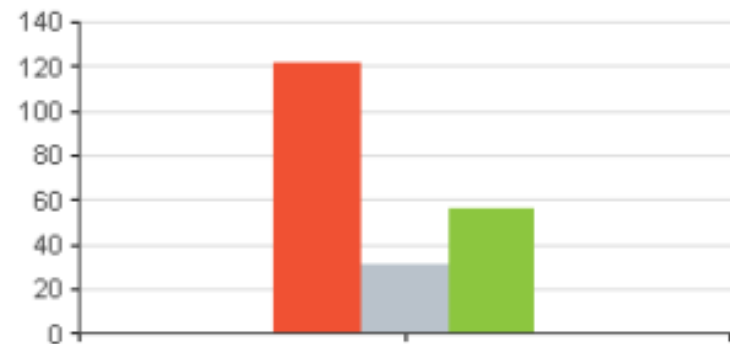
Credentials

Credential Breakdown



■ CAPM ■ PMI-ACP ■ PMI-SP
■ PfMP ■ PMI-PBA ■ PMP
■ PgMP ■ PMI-RMP

Credential Activity



■ Credentials Expiring within 60 days
■ New Credentials in last 60 days
■ Credentials Renewed in last 60 days

- **Monthly Communication with Members**
 - 12 newsletters and 12 eblasts
 - Member recognition monthly (new members, new credentials)
 - Renewal notice (60 day advance)
 - Welcome letters to new members
 - LinkedIn Group
- **Breakfast and Dinner meetings (Jan-Nov)**
- **Education Seminars (5)**
- **Webinars (11)**
- **PMP Exam Prep Class 4 times per year**
- **PDD 4-Day Conference every September**

- 4 Events Held per year in outer areas
 - Bismarck
 - Grand Forks
 - Fargo/Moorhead
 - Duluth/Superior
 - St. Cloud
 - Mankato

Mission

PMI-MN's mission is to provide value to members and the community through opportunities for career development and to advocate the advancement of the project management profession and its disciplines.

Vision

PMI-MN will be recognized globally as a premier, best-in-class, innovative community of project managers who embrace world class practices.

Strategic Focus

| | | | |
|---|---|--|---|
| <p>Strategy: Improve Volunteer Engagement</p> <p>Measures: 90% volunteer retention</p> <p>Initiatives:</p> <ol style="list-style-type: none"> 1. Implement "Volunteer Chat" 2. Onboarding kit 3. Implement VRMS 4. Increase survey response regarding engagement | <p>Strategy: Increase Brand Awareness</p> <p>Measures: Increase website traffic by 10%</p> <p>Initiatives:</p> <ol style="list-style-type: none"> 1. 1-2 radio or TV ads 2. 1-2 radio interviews 3. 2 high school job fairs | <p>Strategy: Broaden Market Focus</p> <p>Measures: 1 Construction Event</p> <p>Initiatives:</p> <ol style="list-style-type: none"> 1. Practitioner Community formed for construction 2. 1 construction organizational partnership 3. Include a construction track at PDD | <p>Strategy: Key Enabler: Information/Business Intelligence</p> <p>Measures: Increase consumable data.</p> <p>Initiatives:</p> <ol style="list-style-type: none"> 1. Member Survey 2. Tools 3. Partners 4. Baseline Data |
|---|---|--|---|

| Income | Jan - Dec 15 | YTD Budget | Annual Budget |
|------------------------|-------------------|-------------------|-------------------|
| 3000 · Event | | | |
| 3010 · Membership | 503,852.75 | 727,218.00 | 727,218.00 |
| 3200 · Sponsorship | 98,405.00 | 101,564.00 | 101,564.00 |
| 3220 · Vendor | 21,456.45 | 11,570.00 | 11,570.00 |
| 3900 · Interest Income | 26,168.75 | 32,632.00 | 32,632.00 |
| | 118.97 | 343.00 | 343.00 |
| Total Income | 650,001.92 | 873,327.00 | 873,327.00 |

| INCOME | 2015 | 2014 | 2013 | 2012 | 2011 | 2010 |
|---------------------------------|-------|-------|-------|-------|-------|-------|
| Membership Dues | 15.1% | 12.9% | 13.7% | 13.7% | 14.0% | 15.9% |
| Education Seminars | 2.3% | 2.1% | 0% | 0% | 4.2% | 9.9% |
| Certification Exam Prep Classes | 6.6% | 16.2% | 0% | 0% | 15.3% | 15.9% |
| Sponsorships | 3.3% | 1.3% | 1.0% | .01% | 0.6% | 2.3% |
| Monthly Events and PDD | 72.7% | 67.4% | 86% | 86% | 65.8% | 55.9% |
| Miscellaneous/Interest | .01% | .01% | .07% | .3% | 0.1% | 0.1% |
| | | | | | | |
| Operations | 25.0% | 26.8% | 27% | 21.2% | 19.3% | 18.4% |
| Membership Program | .1% | .3% | .30% | .4% | 0.5% | 2.0% |
| Education Seminars | 2.7% | 2.4% | 4.2% | 17.0% | 4.1% | 16.3% |
| Outreach Program | .7% | 1.6% | 1.7% | 1.4% | 2.0% | 1.9% |
| Monthly Events and PDD | 58.7% | 51.8% | 54% | 40.2% | 53.1% | 36.3% |
| Marketing & Communication | .9% | 1.5% | 1.8% | 2.3% | 0.9% | 0.8% |
| Certification Exam Prep Classes | 3.5% | 5.7% | 4.2% | 4.5% | 6.9% | 4.6% |
| Board Activities | 8.2% | 9.9% | 6.8% | 13.0% | 12.8% | 13.6% |
| Bad Debt Write-off | 0% | 0% | 0% | 0 | 0 | 6.2% |

ASSETS

Current Assets

| | |
|-----------------------------|-----------------------|
| Checking | \$ 688,761.14 |
| Savings | \$ 396,633.68 |
| Accounts Receivable | \$ 1,250.00 |
| Total Current Assets | \$1,086,644.82 |

Other Assets

| | |
|------------------|-------------|
| Prepaid Expenses | \$ 5,600.00 |
|------------------|-------------|

| | |
|---------------------|-----------------------|
| Total Assets | \$1,092,244.82 |
|---------------------|-----------------------|

LIABILITIES & CAPITAL

Current Liabilities

| | |
|--------------------------|---------------------|
| Accounts Payable | \$ 11,180.98 |
| Unearned Income | \$ 4,800.00 |
| Total Liabilities | \$ 15,980.98 |

Capital

| | |
|--------------------------|-----------------------|
| Equity Beginning Balance | \$ 663,949.87 |
| Retained Earnings | \$ 429,275.14 |
| Net Income | \$ -16,961.17 |
| Total Capital | \$1,076,263.84 |

| | |
|--|-----------------------|
| Total Liabilities & Capital | \$1,092,244.82 |
|--|-----------------------|
