



SAN FRANCISCO BAY AREA CHAPTER

Annual General Meeting

thursday june 07, 2018



Review of Financial Performance



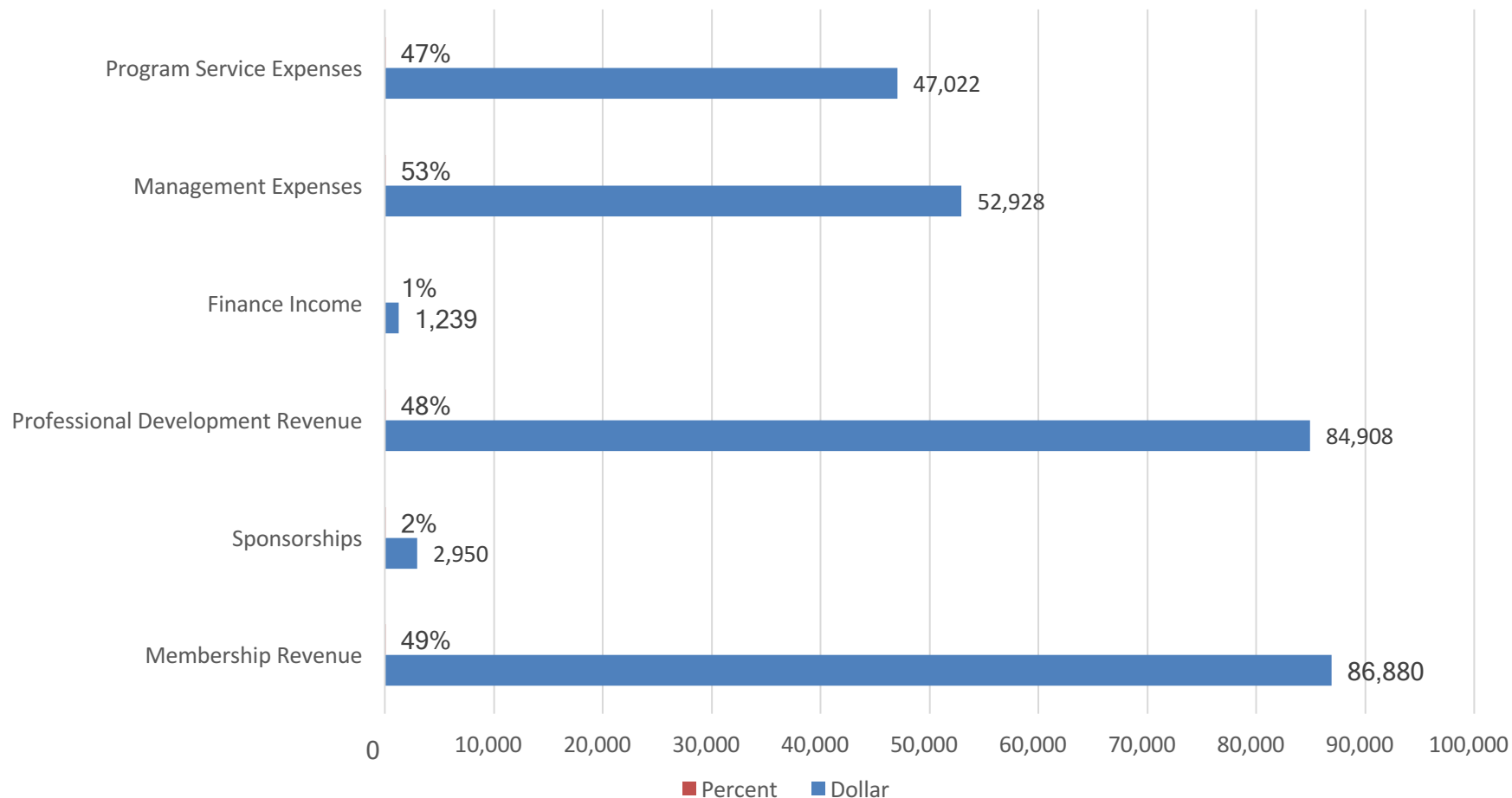
By
Zenaida Alejandrino, PMP
Chief Financial Officer

PMI - San Francisco Bay Area Chapter 2017 Statement of Financial Position As of December 31, 2017

	As of Dec 31, 2017	As of Dec 31, 2016 (PY)	Change	% Change
ASSETS				
Current Assets				
Bank Accounts				
10210 WF Checking - Expense Acct. (3009)	14,032.85	16,261.61	-2,228.76	-13.71%
10220 WF Checking - Income Acct. (3017)	140,135.17	67,011.03	73,124.14	109.12%
10240 WF Savings - Income Acct. (0208)	0.00	78,382.60	-78,382.60	-100.00%
10260 WF Savings - Platinum Acct. (1670)	0.00	159,322.42	-159,322.42	-100.00%
10300 Paypal Cash Account	4,416.52	674.03	3,742.49	555.24%
10400 First Republic-CD (3626)	239,094.04		239,094.04	
Total Bank Accounts	\$ 397,678.58	\$ 321,651.69	\$ 76,026.89	23.64%
Total Current Assets	\$ 397,678.58	\$ 321,651.69	\$ 76,026.89	23.64%
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LIABILITIES AND EQUITY				
Liabilities				
Total Liabilities			\$ 0.00	
Equity				
30200 Retained Earnings	321,651.69	285,706.16	35,945.53	12.58%
Net Income	76,026.89	35,945.53	40,081.36	111.51%
Total Equity	\$ 397,678.58	\$ 321,651.69	\$ 76,026.89	23.64%
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Review of Financial Performance

2017 Revenues/Expenses



PMI - San Francisco Bay Area Chapter

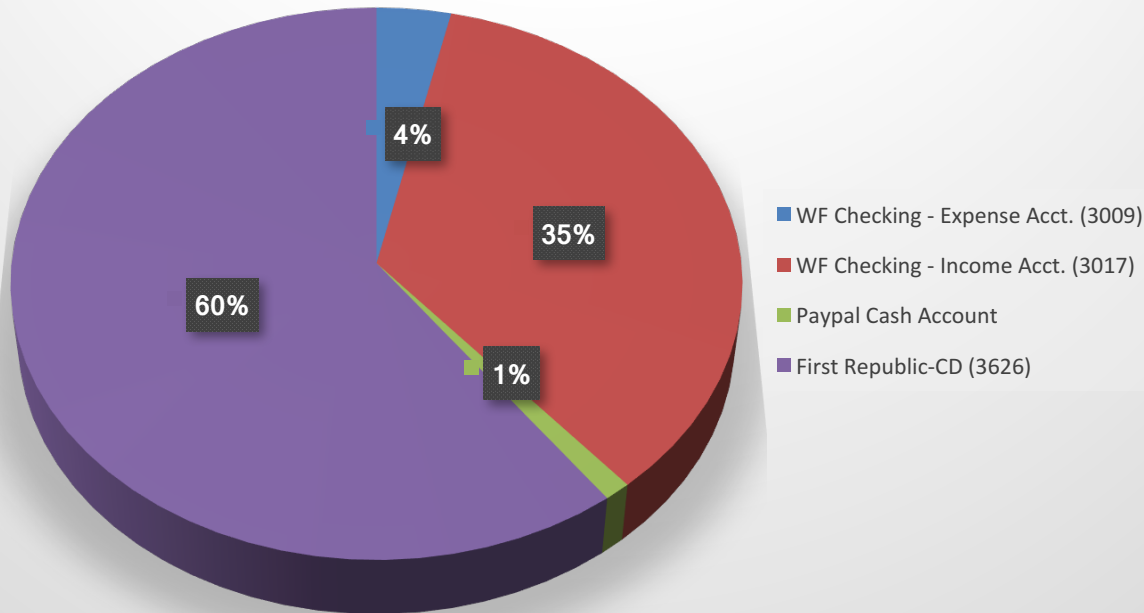
2017 Statement of Financial Position

As of December 31, 2017

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Review of Financial Performance








2017 Bank/Cash Accounts



Review of Financial Performance

Cash Account Summary as of May 18, 2018

Wells Fargo Bank

 BUSINESS CHECKING ...3009	\$17,938.97 Available balance	
 Sign up for alerts		
 BUSINESS CHECKING ...3017	\$122,614.17 Available balance	
 Order business checks today  Business savings accounts		

First Republic Bank

Certificate of Deposit CD #3626 Matures 1/06/19	\$240,876⁹⁹
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Chapter Performance and Updates

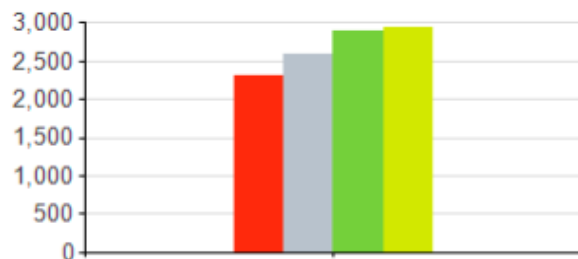


By
Cecilio Mills, PMP
Chief Executive Officer

Chapter Membership Update

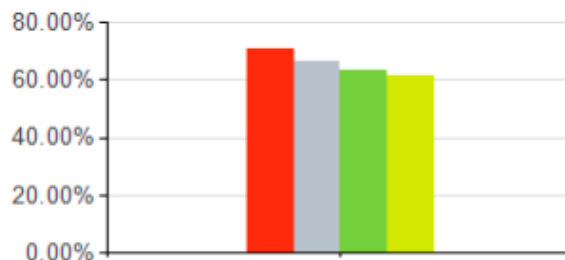
Membership

Membership Count



01/01/2016 01/01/2017 01/01/2018 16/05/2018

Retention

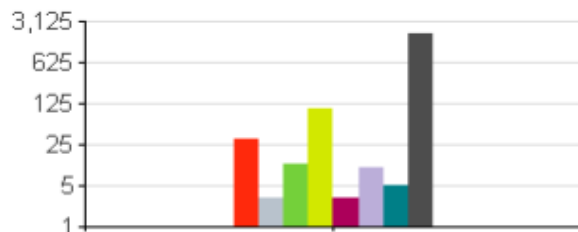


01/01/2016 01/01/2017 01/01/2018 16/05/2018

Run Date: 17-May-2018 02:50 AM

Credentials

Credential Breakdown



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

Credential Activity



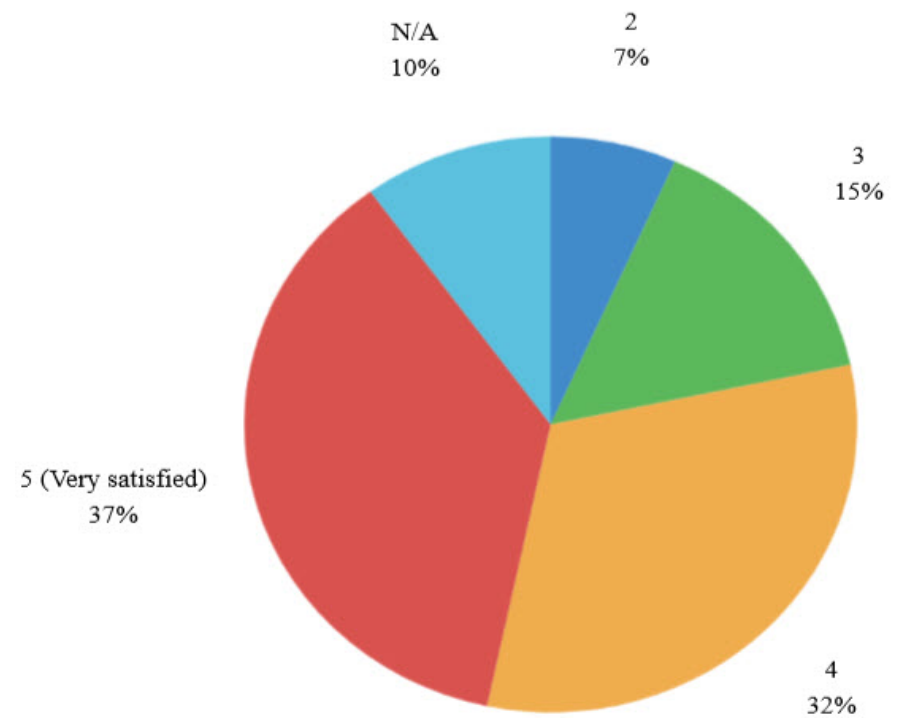
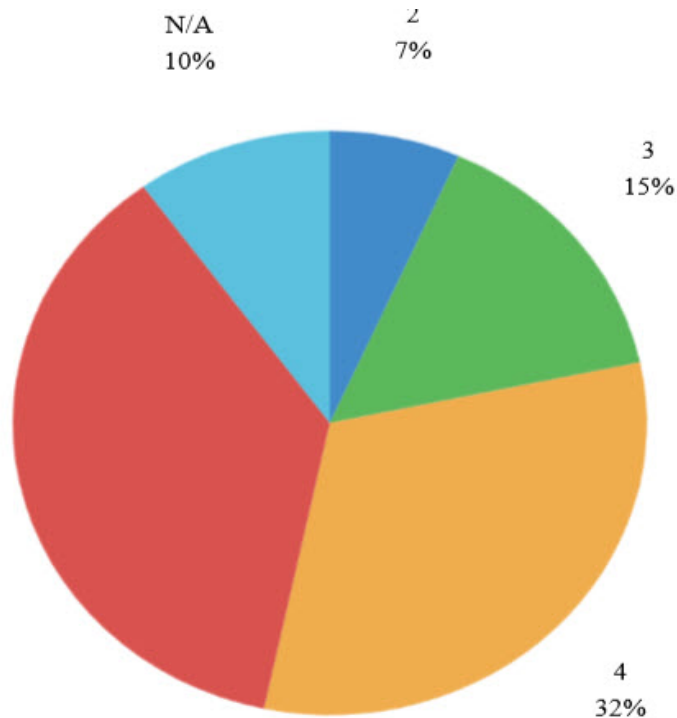
Credentials Expiring within 60 days
New Credentials in last 60 days
Credentials Renewed in last 60 days



2018 PMI SFBAC Annual Survey

How satisfied were you with the quality of Events offered by the chapter this year?

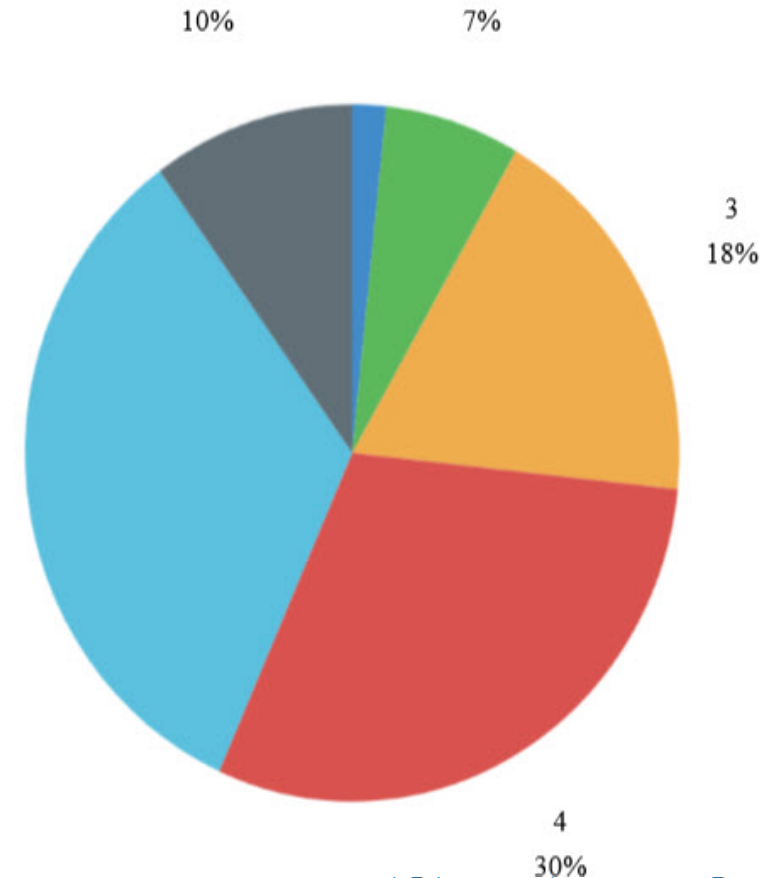
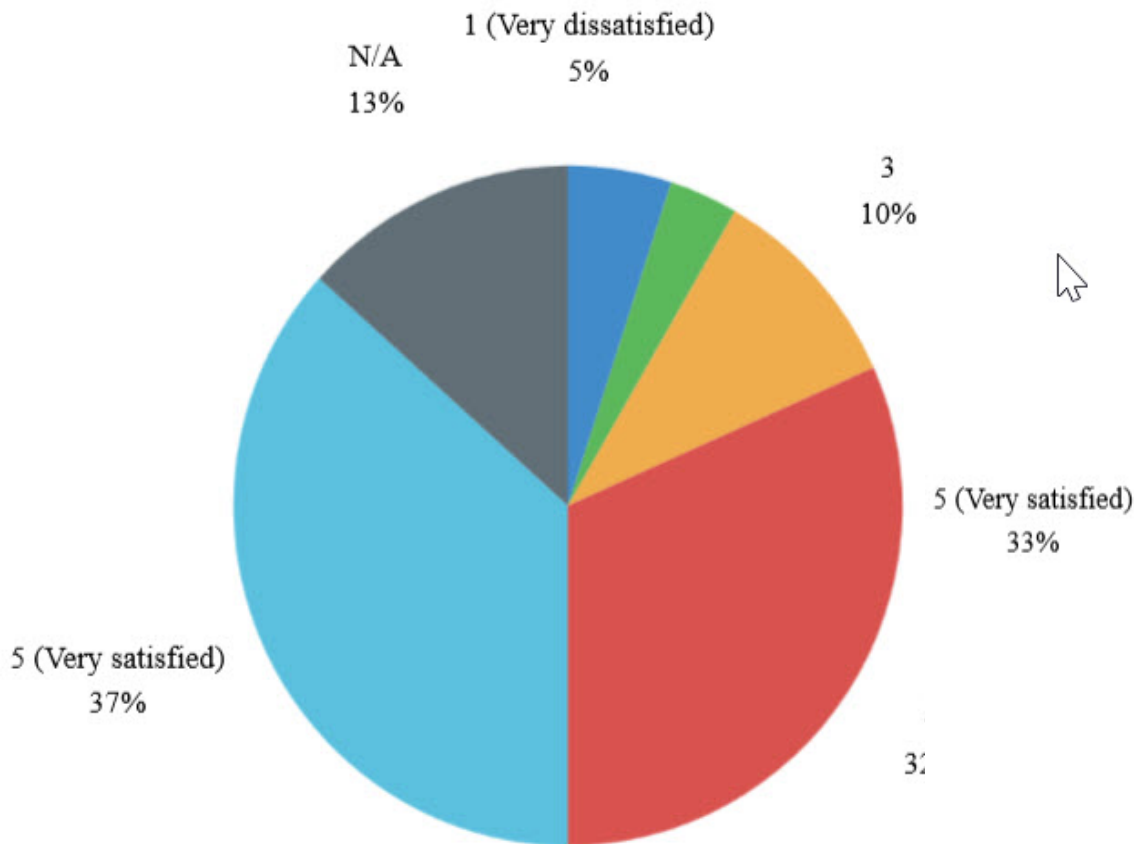
Overall, how satisfied were you with the schedule and format of the Events?



2018 PMI SFBAC Annual Survey

Overall, how satisfied were you with the speakers / presenters for the Events?

How satisfied were you with the location of the Events?

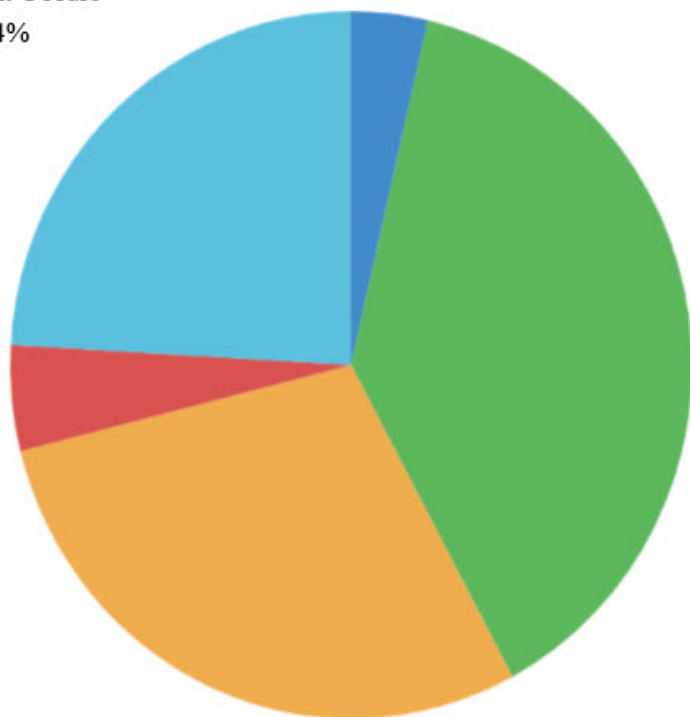


2018 PMI SFBAC Annual Survey

How often do you prefer that the chapter communicate to you regarding various events?

As Event Occurs

24%



Monthly
29%

Weekly
39%

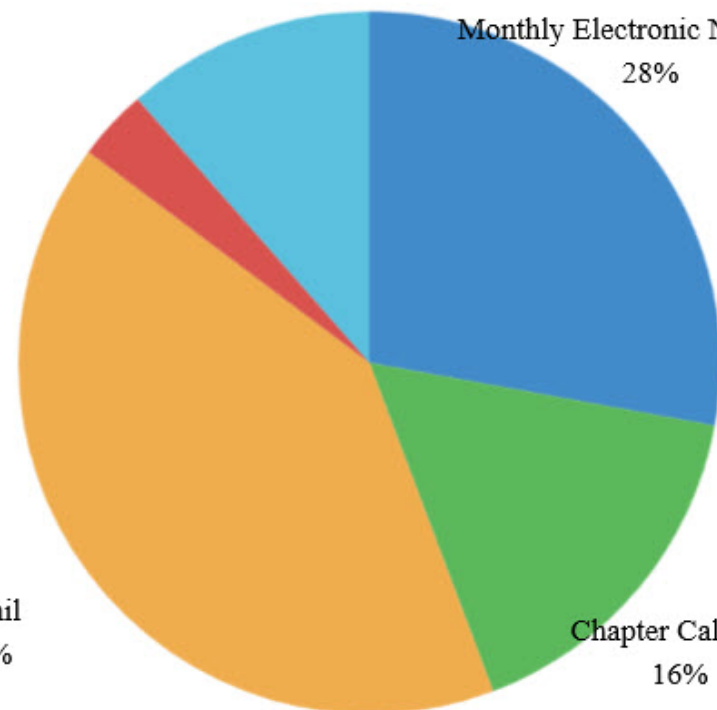
What is your preference to receive information regarding the chapter activities?

LinkedIn

11%

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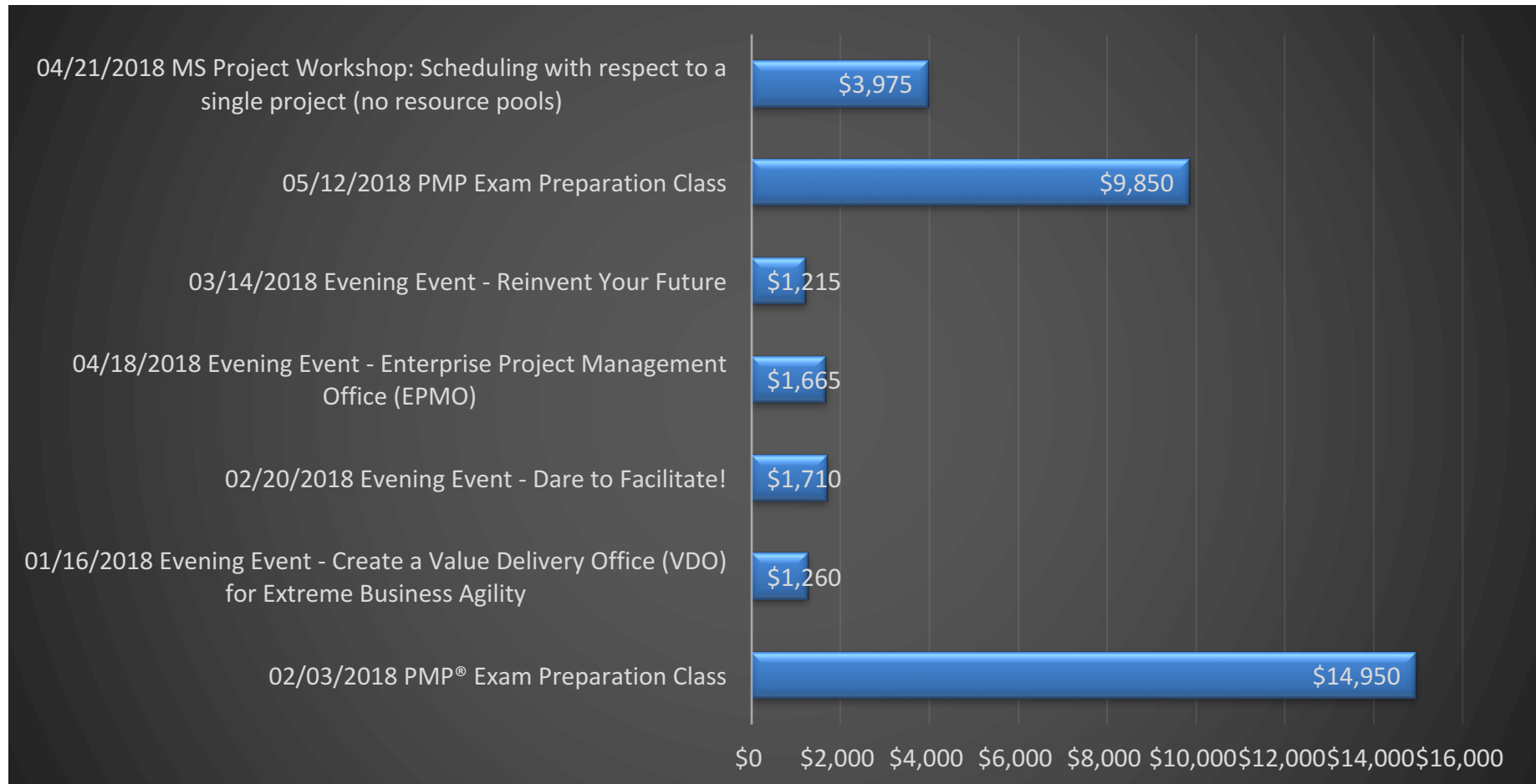
Monthly Electronic Newsletter
28%

Email
41%

Chapter Calendar
16%

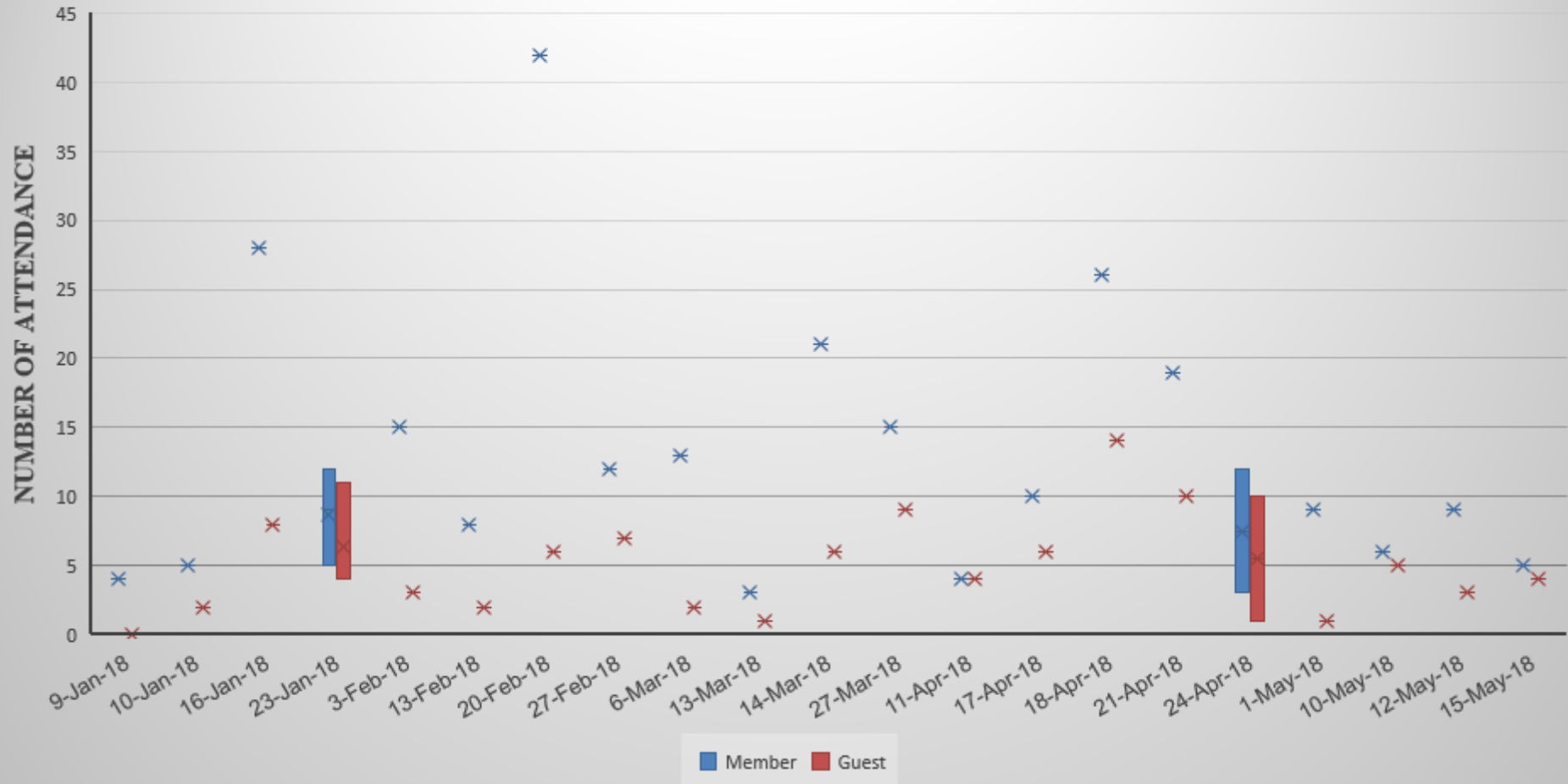
Review of Performance

Revenue Collection By Events 2018



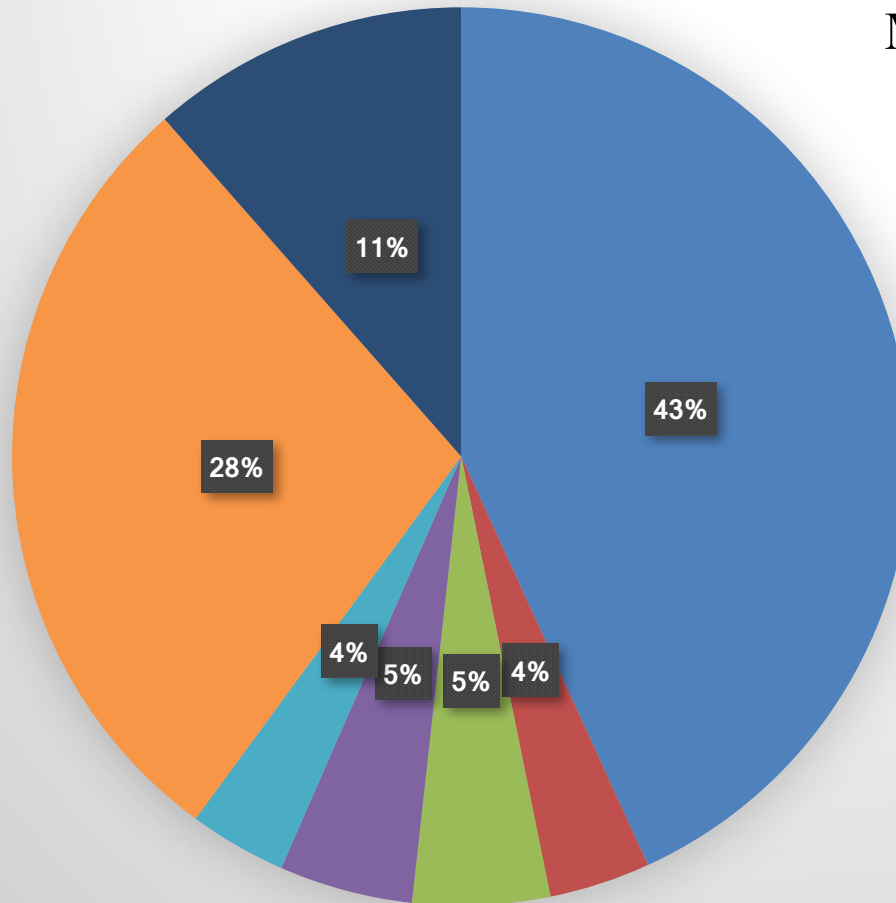
Review of Performance

PMISFBAC Attendance by Events: 20018



Review of Performance

MAJOR CONTRIBUTING



- 02/03/2018 PMP® Exam Preparation Class
- 01/16/2018 Evening Event - Create a Value Delivery Office (VDO) for Extreme Business Agility
- 02/20/2018 Evening Event - Dare to Facilitate!
- 04/18/2018 Evening Event - Enterprise Project Management Office (EPMO)
- 03/14/2018 Evening Event - Reinvent Your Future

New Programs

Military Outreach Program

Status update

- PMISFBAC Military Outreach Director Story
- Working with other chapters to share knowledge and build up this community.
- PMISFBAC ongoing outreach to Travis AFB, GGU/Devry veterans, Coast Guard, & monthly military roundtables
- PMISFBAC looking to partner with large corporations like Wells Fargo, PG&E, and WorkDay.
- PMI Global support for Military programs at LIM



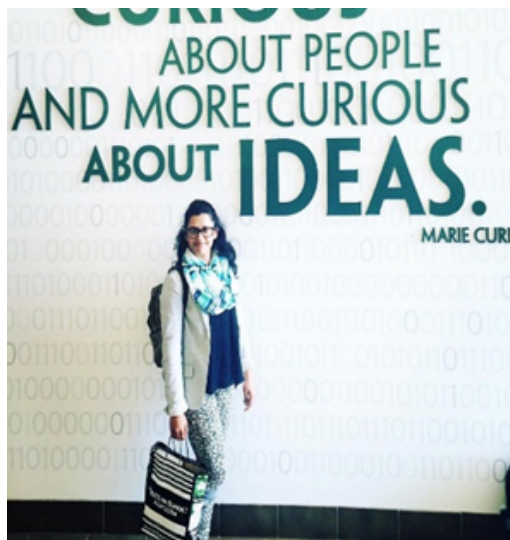
Academic Outreach Program

➤ Status update

- Outreach to high schools in Foster City, huge success, look to repeat similar effort 2018-2019 term
- Partner with Bay area Universities: GGU, DeVry, HULT, SF State, UCSF, San Mateo CC, CCSF
- Focus at career fairs is to provide opportunity to bring awareness to certification, project management resources, networking, and volunteer opportunities.



Chapter Numbers & Updates



- Membership History:
2015: 2,217 2017: 2,889
2016: 2,315 Current: 3,006
- New Members last year - 1085 ↑
704 in 2015
 - 14% of the total region - NV, CA, NM, HI ↑ (region 7208)
- Annual Attrition rate 33% ↓ - region at 34%
- Satisfaction indicator 53% ↓ region 63%
- Reinforcing social media usage for Marketing team
- Star Chapter & G-suite projects complete
- Cross training team members & document material
- Creating an inventory of speakers & topics



Looking Forward to 2018-2019 by Nathan Mellin, PMP Nathan.Mellin@pmisfbac.org Board President

“Keeping the dialogue open between the Board and the Chapter’s Member-Owners (membership and other stakeholders) known as Ownership-Linkage under the Policy Governance® Model”

