October 2014 Meeting Packet

PMI Metrolina Joint Board Meeting – August 12, 2014
Location: 2520 Whitehall Park Drive Suite 250 Charlotte, NC 28012/Virtual

Attendees:

Name	Name
President – Tonya Brown	**VP Communications** – Dani Beckman
VP Membership – Dwayne Chapital	**VP Finance** –David Gadalla
Past President – Craig Marek	**VP Programs** – Jennifer
VP Prof. Development–Joe Griffin	**2015 Board members: Robin Covington, Sheetal Puri, Mark Cochinski**

AGENDA

- PM in Education
- Administrative Items
  - Monthly recognition
- Decisions Needed
  - Blue Diamond Award
- Election Update
- LIM Update
- Handbook Update – new dates
- Volunteer/Transition updates
- Meeting Locations 2015
- Volunteer Recognition update
- Final strategic plan review
  - Communications
  - Finance
  - Membership
  - Professional Development
  - Programs
  - President
- Action Item Review
- Open Discussion/Adjournment

Recent &Upcoming Administrative Activities

Insurance payment –Due in Sept

R5 Open Registration

Task	Responsible	High Level Status	Start / End	
Board Meeting	Brown	G	1/14/2014	1/14/2014
Saturday PDU – 1stQtr	Griffin	G	1/25/2014	1/25/2014
VOICE Event	Chapital	R	2/18/2014	2/18/2014
PMP Prep	Griffin	G	2/8/2014	3/8/2014
Board Meeting	Brown	G	2/11/2014	2/11/2014
Skillfest	Baker	G	3/3/2014	3/3/2014
Joint Board Meeting	Brown	G	3/11/2014	3/11/2014
R5	Brown	G	3/13/2014	3/15/2014
Board Meeting	Brown	G	4/8/2014	4/8/2014
Saturday PDU – 2ndQtr	Griffin	G	4/26/2014	4/26/2014
Spring PMP Prep	Griffin	G	4/5/2014	5/3/2014
Joint Board Meeting	Brown	G	5/13/2014	5/13/2014
Board Meeting	Brown	G	6/10/2014	6/10/2014
Skillfest	Baker	G	6/23/2014	6/23/2014
Board Meeting	Brown	G	7/8/2014	7/8/2014
Summer PMP Prep	Griffin	G	7/26/14	8/23/14

Task	Responsible	High Level Status	Start / End	
Joint Board Meeting	Brown	G	8/12/2014	8/12/2014
Skillfest	Baker	G	8/25/2014	8/25/2014
Election	Marek	G	8/1/2014	8/31/2014
Saturday PDU – 3rdQtr	Griffin	G	9/6/2014	9/6/2014
Board Meeting	Brown	G	9/9/2014	9/9/2014
PDD	Baker	G	9/27/2014	9/27/2014
Board Meeting	Brown	G	10/14/2014	10/14/2104
Fall PMP Prep	Griffin	G	10/18/2014	11/2/2014
LIM	Gadalla	G	10/23/2014	10/25/2014
Board Meeting	Baker	G	11/11/2014	11/11/2014
Board Strategic Planning session	Baker	G	12/7/2014	12/7/2014
Saturday PDU – 4thQtr	Griffin	G	12/7/2014	12/7/2014
Volunteer Recognition	Chapital	G	12/9/2014	12/9/2014

September Meeting Minutes

PMI Metrolina Chapter Board of Directors Meeting – September 2, 2014

ATTENDANCE:

     President – TonyaBrown (present)
     Past President – Craig Marek (not present)
     VP of Communications – John Schneider (present)
     VP of Finance – David Gadalla (present)
     VP of Membership – Dwayne Chapital (present)
     VP of Professional Development – Joe Griffin (present)
     VP of Program – JenniferBaker (present)
     Scribe – JohnSchneider (present as noted above)

MEETING SUMMARY:

1) Administrative Items:

a) Meeting Emcee – Jennifer Baker will be the Emcee for the June chapter meeting.

b) Monthly Recognition –This month we will recognize Anne Jenneman now that we have approval

2) Reviewed PDD progress; less than 70 people have registered; still trying to obtain shirts from Component wear but may need to secure a new vendor

3)Decided to pursue a long term agreement to stay at Byron's instead of doing an RFP as long as they met our request for changes; Dave to follow up.

4) Volunteer Recognition will be held at Bubble; more details to come (Dwayne)

5) The annual Strategic Planning session will be held on 12/7/14. We are pursuing a return to the Duke Mansion (Jennifer)

- **Finance –10/14/2014**
- **Issues –** N/A
- **Needing Assistance / Input–**
- **Taxes –**Complete
- **Update–**
-
-
  Financials
- **Account Balance**
- Current Account Balance as of 9/30/14: $161,564.95
- Previous Account Balance as of 8/31/14: $154,138.16
- **Upcoming Expenses for October**
- LIM, 5 Computers
-

September Credits – $ 18,351.96		**SeptemberDebits - $10,925.17**	
SeptemberMeeting	$2,853.00	Merchant Fees	$234.18
PMI Global	$3,535.00	Meeting	$0.00
Satellite Meetings	$491.00	PDD	$3,492.80
Partnership	$1,100.00	BOD Meal	$98.10
Winter Prep	$2,780.00	Starchapter	$150.00
Oct Meeting	$0.00	Accountant	$0.00
PDD	$7,937.00	Apparel	$162.86
Merchant Fees (CC)	($344.04)	Satellite Meetings	$988.24
		Winter Prep	$375.19
		LIM	$5,173.80
		Asset Purch (Software)	$0.00
		Strategic Planning	$250.00

Communications

Communications – 10/10/2014

Metrics –N/A

Issues – Still need to get acclimated to the team and their given roles. There was no structure and it is not quite evident how they functioned nor has it been easy to round up the troops. I am still having issues getting materials from some of the team members and am about to issue some ultimatums shortly.

Needing Assistance / Input –

- Marketing – according to Vickie, there was no Marketing Plan, She and John had brainstorming sessions, but nothing in writing or specific, so we are back to nothing. She is not capable of giving this position any time as she is busy with work and commuting. So there was no marketing done this year and none planned so far for next year. "I am disengaged at this point" were her words to me and that we should talk about what my expectations are so we can decide whether or not she should continue at this point.

- Social Media – Rich and I spoke about the Social Media "plan" at the last chapter meeting – 9/16 – at which time I asked him to type up what we discussed and send it to me, then I asked again if he could have it to me by our team meeting, which got cancelled, still didn't have it, asked again to just send it to me even though we didn't have the meeting so I could review, and I still don't have it. I have repeatedly given him deadlines that he continues to ignore. I have given him one more – Monday, 10/13 – this will be my last one before I post his position to find someone else to cover social media.

Communications

Update –

- The presentations from PDD are up on the website. I would like to have all of the chapter meeting slides posted to the website as well – the intro slides with all the acknowledgements – seems like an easy item, something we know how to do and people can look at easily for information but are not currently loaded.

- The newsletter is running smoothly now that we understand the reasoning behind the missing reminders and the issues with the star chapter reminder notices. Christina is on top of things and her backup Ryan is aware and ready to fill in when she cannot complete it. She is in the process of documenting the process so we have it in place in case of transition.

- Website team and I will be meeting soon to discuss a more user friendly version of the website. There was a meeting scheduled but last minute business trips caused a cancellation. We have some ideas in place and need to realistically plan out how to chunk them into smaller projects and a timeline.

- Monday PDU emails are going well.

- Social Media chair is an Issue and noted above.

- Marketing chair is an Issue and noted above

Misc. –

- Race for the Cure was amazing – we had a handful of us and a sign for PMI Metrolina and every time we hit a checkpoint, they announced us over the loud speakers. Our pictures were taken, we were put on the Charlotte Affiliate of Susan G Komen's Facebook page and got a lot of exposure that day, so I deem it a great success and something we definitely need to get a hold of earlier and make a stronger push to have a larger presence in….

- Newsletter Editor – I received an email with a resume for an open position for a newsletter editor, but I do not think we need more than Christina and Ryan – thoughts? Three seems overkill and too many cooks in the kitchen…..

Website Task List

Task	Site Section	Volunteer	Status	Due Date
Send FAQ question/answer list to Devon		John	Not started	
Send Meeting Minutes to Bailie		John	Not started	
Overall web strategy including social media		John	Not started	
	About - Past Presidents	Chris	Not started	
	About - Accreditation	Devon	Not started	
	About - Leadership	Bailie	Pending delivery	
	About - President's Message	Bailie	Complete	
	About - History	Chris	Not started	
	About - Ethics	Devon	Not started	
	About - Chapter Documents	Devon	Not started	
	About - PMI Global	Devon	Not started	
	FAQ	Devon	Not started	
Create PDF copies of old history	Resources - Newsletter	TBD	Not started	
	Resources - Chapter Chat	TBD	Not started	
	Resources - Event Handouts and Slides	Bailie	Pending delivery	
	Resources LinkedIn Jobs		Not started	
	Resources - Educational Opportunities		Not started	
	Members - Member Area	Devon	Not started	
	Members - Volunteer	Bailie	Complete	
	Events - Satellite Meetings		Not started	
	Events - Chapter Meetings		Not started	
	Events - Certification Training		Not started	
	Events - Saturday PDUs		Not started	
	Events - Mentoring Events		Not started	
	Events - Special Events		Not started	
	Events - Community Service		Not started	
	Connect - Join	Pete	Not started	
	Connect - Volunteer	Bailie	Complete	
	Connect - Mentoring	TBD	Not started	
	Connect - Networking	Devon	Not started	
	Connect - Social Media	TBD	Not started	
	Search		Not started	
	Site Map		Not started	
	Footer links		Not started	
	Header links		Not started	
	Partners		Not started	
	Featured Member		Not started	

Professional Development – 10/14/2014 (Combined Sept. & Oct. Report)

Summary:

This report contains updates on our most recent PMP Prep Class and Saturday PDU event, both of which went well. There are some instructor lessons learned from the PMP Prep Class, which we are working to resolve in the upcoming Fall PMP Prep Class. Scheduling is underway for the next Saturday PDU event and our PMP Prep Class focus group project. Please note that this is a combined September – October status report.

Upcoming Events

Class	Start Date	Final Date	Location	Address	Notes	Status
PMP Prep – Summer	July 26	August 23	Duke Energy	Uptown		Completed
Saturday PDU Event	Sept. 6	Sept. 6	CPCC	Harris Campus		Completed
PMP Prep Fall	Oct. 18-19, 25-26, Nov. 1-2	Nov. 2	Wake Forest Univ.	Uptown	14 registered to date	In Process
Saturday PDU Event	Dec. 6	Dec. 6	TBD	TBD	N/A	In Process

Professional Development – 10/14/2014 (Combined Sept. & Oct. Report)

Update on Recent Events:
• Summer PMP Prep Class
o 20 attendees
o Total Revenue $13,911
o Est. Total Expenses: $6,200
o Est. Net Rev: $7,711
o Instructor Evaluations:
☐ Sacha Soja – excellent feedback on all her evaluations; students see her as very knowledgeable and able to clearly communicate ideas in an understandable manner2 | Page
☐ Mike Ryan – received mostly positive feedback, but did receive quite a bit of negative feedback, as well. This is apparently due to the fact that he was teaching a new section and was less familiar with the material; Sacha has re-assigned him to the previous material and has coached him on his performance.
☐ Dave Violette – almost entirely positive feedback; a few students felt like he spent too much time on 'war' stories rather than course materials; feedback has been provided so that future sessions can be improved.

☐ Evaluations attached in appendix

Professional Development – 10/14/2014 (Combined Sept. & Oct. Report)

Saturday PDU Event – Agile (Sept. 6)
o Overall results: Excellent review prepared and approved
o Event was successfully executed
o Total Cost: $375.14
o 67 people attended

o Event survey statistics are reported below: (40 survey forms were returned)

Statement:	Strongly agree	%	Agree	%	Neutral	%
The workshop met my expectations	26	65%	13	2.5%	1	2.5%
I will be able to apply the knowledge learned	19	47.5%	16	40%	5	12.5%
The content was organized and easy to follow	28	70%	12	30%	0	
The materials distributed were pertinent and useful (no materials were distributed)			14	35%	26	65%
The trainer was knowledgeable	32	80%	8	20%	0	
The quality of instruction was good	29	72.5%	11	27.5%	0	
Class participation and interaction was beneficial	26	65%	14	35%	0	
Adequate time was provided for questions and discussions	24	60%	13	32.5%	3	7.5%
Training environment was comfortable	27	67.5%	11	27.5%	2	5%

Professional Development – 10/14/2014 (Combined Sept. & Oct. Report)

Qualitative Feedback:
o Overall, great comments on the venue, topic content, hands-on activities and over all training environment.
o More time for question/answers
o More construction related events requested

1 One respondent did not provide a response to this question.3 |

o Follow up with Agile Part-2
Update on Upcoming Events

• **Upcoming PMP Prep Course Feedback Session**
    o We are planning to hold the PMP Evaluation focus group on November 15, 2014; it will be framed as a lessons learned sessions, where we will briefly present best practices for performing lessons learned, and then we will use the PMP Prep class as a case study for performing a lessons learned session; this will allow us to gain the feedback we need, and we can offer PDUs for the event.
• **Fall PMP Prep Class**
    o Being held at Wake Forest University
    o All plans are in place; this is a transition point for onboarding a new Prep Class Chairperson for next year
    o 14 registered to date
• **Saturday PDU Event – Leadership Topic**
    o Tom Cooper is scheduled to speak
    o Scheduled for December 6
    o Location is being secured currently
    o Will follow previous formats
Other Items
    • Currently, Sacha is reviewing a number of candidates to begin teaching PMP Prep classes next year, and we look to build our bench strength.
    • Additionally, I am beginning to build a team of individuals to kickstart PDD planning for next year, as it will be transitioning to Professional Development.

Needing Assistance / Input –

October Status Report

Programs

Chapter Meeting Agenda

The facilitator for the meeting will be Dwayne Chapital. The meeting agenda for the chapter meeting is as follows:

- Welcome & Introduction
- Congratulations to our newest Credential Holders
- Welcome to newest PMI Metrolina members
- Volunteer of the Month – TBD
- Volunteer Opportunities
- Corporate Partnership
- PDU Opportunities
- Upcoming Events
- Speaker Presentation
- Closing

Remaining 2014
Chapter & Satellite Meetings

October 16th – Garrafalo's Concord. Satellite Dinner Meeting. Dr. Jim Conrad: PM in Entrepreneurial Companies

October 18th- Longhorn Wilmington. Satellite Luncheon Meeting. Topic Discussion

October 18th – Lone Star Fayetteville. Satellite Luncheon Meeting. Stephan Opalka: Challenges in Implementing ITIL for a Government IT environment.

October 20th – WCU Biltmore Campus. Asheville Satellite meeting. Topic Discussion: Scariest Project Moment

October 21st – Byron's South End. Charlotte Chapter Dinner Meeting. John Laurence Busch: Building the First "Steamship" in History.

October 23rd – CVCC. Hickory Satellite Meeting. Topic Discussion

October 30th – Fox & the Hound Huntersville. Satellite Meet & Greet. Q&A Session.

November 4th - Wingate University – Ballantyne campus. Satellite meeting. Topic Discussion: Project Manager as an Educator

November 4th - Fort Mill YMCA – Satellite Meeting. PMBOK Review

November 6th – Lone Star Mooresville. Satellite Dinner Meeting. Topic Discussion: TBD

November 8th – Camp Lejeune SAIC office. Jacksonville. Satellite Meeting. PMP Exam Hints and Tips

November 10th – Round Bistro – Gastonia. Satellite Dinner Meeting. Topic Discussion: TBD

November 13th - Midtown Sundries – Denver. Satellite Dinner Meeting. Topic Discussion: Most Grateful Time as a PM

November 15th New Hanover County Library. Wilmington Satellite Meeting. Angel D'auria: Saving Troubled Projects

November 17th – Webinar. Portfolio Management Community of Practice – Portfolio Risk Management with Dan Phillips

November 17th - WCU Biltmore Campus. Asheville Satellite meeting. Marc Fretwell: Program Management at Siemen's

November 18th - Byron's South End. Charlotte Chapter Dinner Meeting. Edie Raether: Why Carrots and Sticks Don't Work.

November 20th - Garrafalo's Concord. Satellite Dinner Meeting. Topic Discussion: Most Grateful Time as a PM

Other Programs & Events

- Mentoring Session in November – "Red Light, Green Light, 1 2 3 – Project Status" Mark Cichonski
- Portfolio Management Webinar with Dan Phillips on November 17
- Partner with Dr. James Brown for program in Q1 2015. Details forthcoming.
- Discussion with Olympic High School for mentoring. Note forwarded
- Satellite Groups
  - Jacksonville satellite meeting had 10 attendees and received 12 regrets via email. 3 folks volunteered to co-lead the group. Have identified a meeting location at no cost.
  - One of the Ballantyne Site leaders has said that she is resigning at year end. Talking with someone about this location position now.
  - Open Huntersville site leader position has been filled – Ronda Elsea.
  - One Gastonia leader has resigned due to job change. Two remaining site leaders.
  - Programs Admin Chair (Nick Kubick) resigned due to job change. Position has been filled by Ray Daines.
- Potential for joint meetings with other professional groups
  - We were approached by Dr. Jim Conrad to do a joint meeting with IEEE. Thinking about asking Jim De Piante to come back to talk about the Watson Project – this would be something that would be applicable for both groups.
  - Collabera approached us and asked about doing a joint meeting with IIBA. Kathleen Britton is their president and a member of the chapter who also approached separately wanting to invite their board to a meeting.   Potential for March joint meeting. A speaker about requirements would be a good fit for both.
  - Another group that may be a good match is APICS. Dave Violette is a good potential speaker that would be beneficial to both. Would touch on the procurement side – alignment with PMBOK.

September Chapter Meeting Survey Results
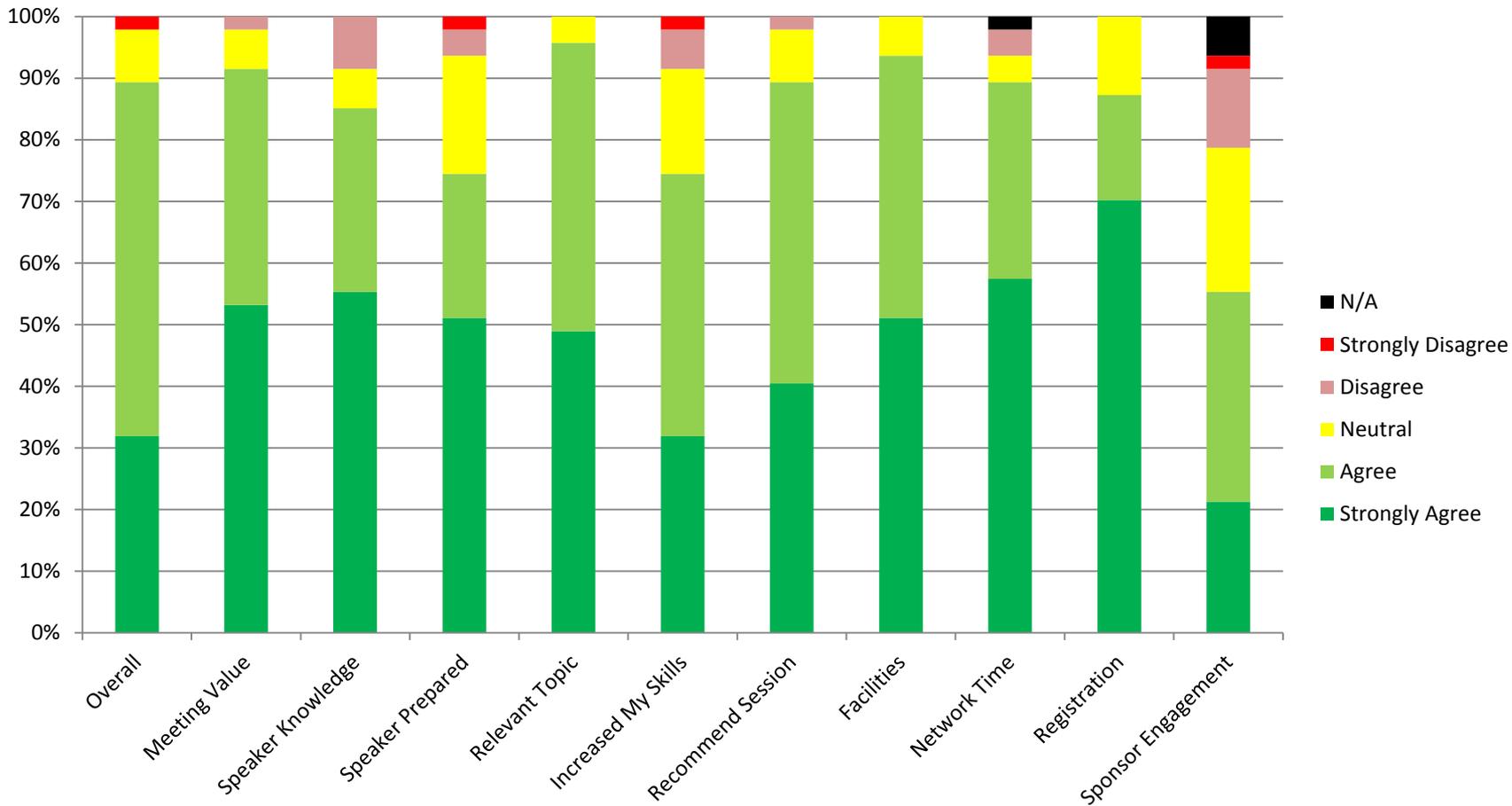
September Chapter Meeting Survey Results

- Love Byrons! Heard grumbling about difficulty registering for other Professional Development (Business Analyst) and how easy you make participation for us! Thank you! Nice infrastructure.
- My first chapter meeting. I will come again.
- The font size on the slides should be large enough that the audience can read the material especially if the speaker doesn't read the slide as this speaker didn't. e.g. Retrospective slide. Speakers should use the microphone and repeat the question. This topic is interesting. This speaker is not so interesting. Thanks for the vegetarian food options. The room is too cold. Next slide please is annoying.
- While I could hear the speaker fairly well (I was in the middle of the room), I really think that all speakers should be mic'd – no matter how loud they think they are as the A/C units really act as an effective white noise generator. (and after I finished writing this, someone handed the speaker the microphone – thanks!)
- Good speaker.
- Very nice. Lots of real PM jargon. CMMI, etc.
- Not all slides were easy to read in the audience.
- I would suggest that the speaker repeats all questions before answering them – thanks!
- Could have been simplified for a wider audience.
- It seemed like Jon had not reviewed the slides for quite awhile. He had to reflect on a lot of slides to figure out what it was saying. Great content. Very relevant.
- Presentation moved slowly. Color slides may have helped with clarity. A number of slides were too small to read. Did get the concepts across.
- Speaker lost focus during Q&A. Topic shifted into Agile process vs. Agile/Traditional comparison.
- Very much looking forward to the October program – history building the first steamship
- Too cold
- Confusing presentation. Was hoping it would be better as I need to learn this subject.
- Presentation was disjointed. Too much like a college class. Not an engaging speaker.
- Really cold in here!!!
- Everything is great. Would be good to have knives – not just forks. Also have slides uploaded to the chapter's site.
- Very relevant
- Speaker allowed too much interaction with audience which brought him off topic a few times, then he ran out of time. But it was a very good informative presentation.
- Good comparison example of Agile vs. Waterfall. Interesting point to build quality into the sprint. Excellent presentation – bring Jon back soon!

PDD Overview
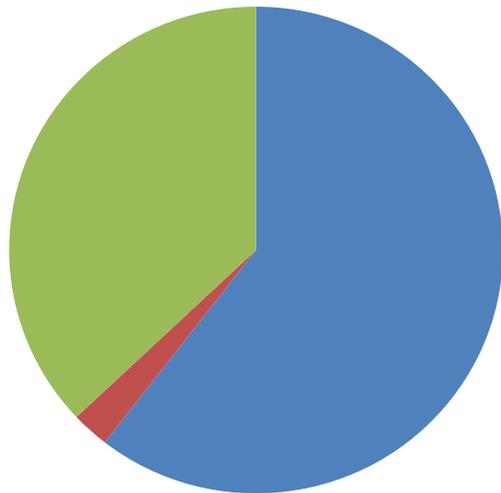
- Official Attendance: 144
- Attendee Revenue Collected: $10,966.00
- Sponsorship Revenue Collected: $2,050.00
- Expenses Paid & Projected: $6,959.65
- Net Profit: $5,831.35
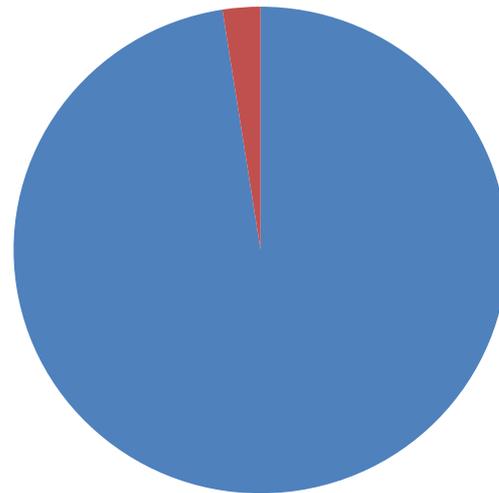
PDD Survey Results –
Favorite Speaker or Session Attended
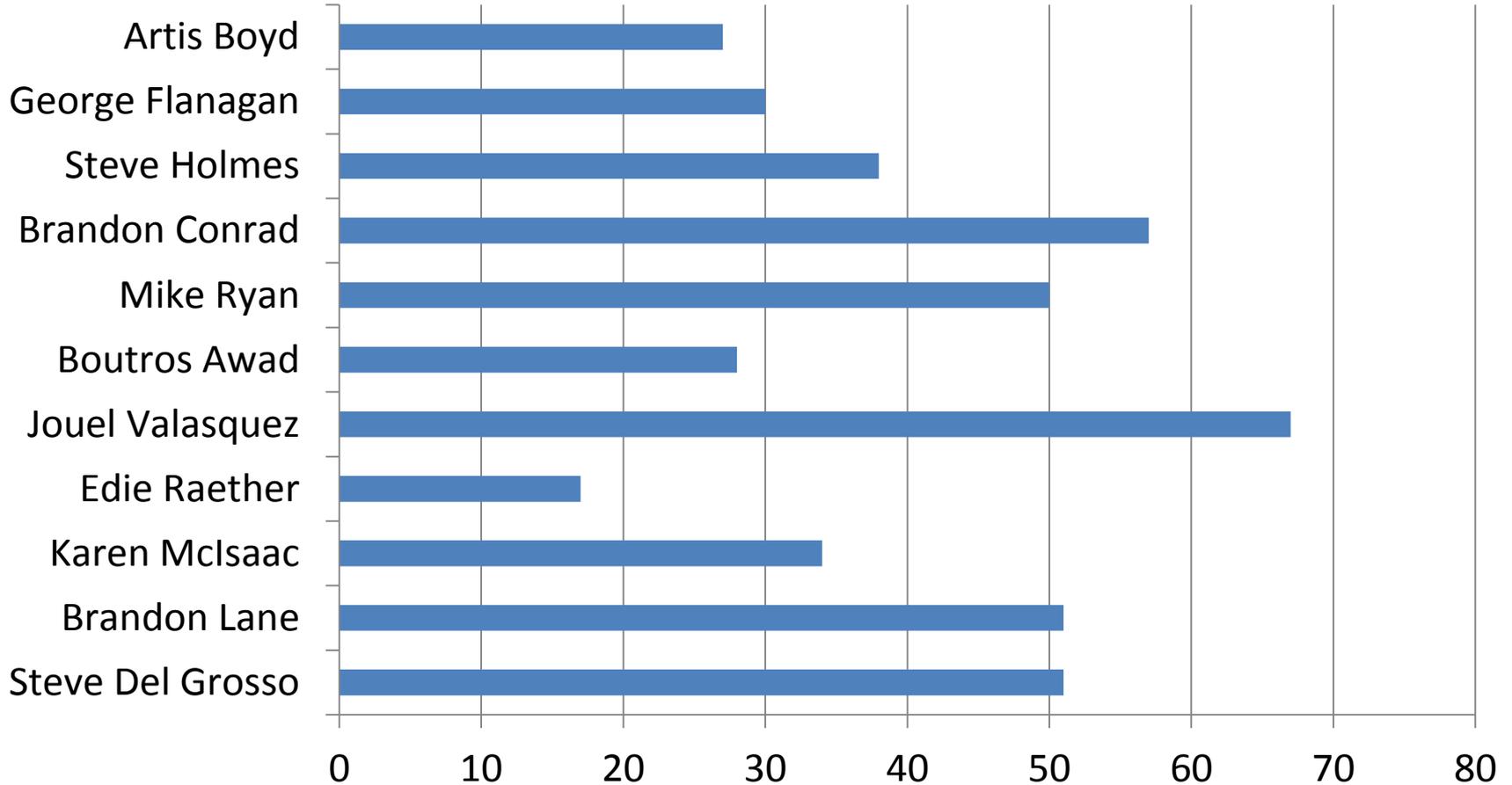
PDD Survey Results - Attendance

Have you attended a PDD event previously?

Based on this PDD, will you attend again?

- Yes

- Yes
- No Answer
- No

PDD Survey Overall Comments – Keynote & Session Speakers

- For a keynote, kick-off, I need a high energy motivator. Topic and delivery style of Steve Del Grasso may have fit another session better.
- I did enjoy the PMCoE theme of the first two Keynotes. This was applicable to my company as we are establishing a CoE (on which I participate), so I definitely got some benefit from those discussions, and things to take back to my company.
- The final keynote speaker was not very compelling. Make sure to keep one of" best" for last.
- Higher level of presentation in terms of content. Steve, Brandon Lane were at right level. Rest I attended were rudimentary. However, of interest was the mind mapping, but that was vendor presentation not a lot about actual requirements capturing. I liked the software though.
- There was a lot of overlap between Lane and Holmes presentations because of the Duke Energy topic, so I would avoid speakers from same company.   Also, the closing keynote could have been more energetic.
- I enjoyed the sessions especially Mike Ryan`s because it was sort of a hands-on session.
- Edie Raether and Joel Valasquez should be invited to speak at a monthly chapter meeting.
- Brandon Conrad was great. Several people in my session were really excited about trying to use the software at work. I would certainly recommend it. Great tool.
- Sessions were great!
- I attended the mind mapping session and was disappointed as it was more of a sale pitch than a discussion of requirements.
- Having the Mind mapping be more about the process and requirements definition than a software plug.
- I did not care for Edie Raether`s presentation at all. Not organized, I had trouble figuring out the objective. Slides were very poorly done. Too many generalizations with no point.
- Mike Ryan`s presentation assumed the audience knew about Scrum - many didn`t. As the title suggested, I was looking for methods to apply Agile to project management. The presentation was more of an overview of agile principles. Disappointing, really.
- I think Edie Raether would make a very good Keynote speaker to start the PDD day off with a lot of energy.
- In the sessions I was attending - specifically Risk Management and Project Scheduling/Controls - I was hoping for tools and/or best practices to apply directly to my projects. Instead, both sessions morphed into a freehand discussion of anecdotes and commiseration. There were no real "take-aways'; for me to use on my current project.
- Sessions I attended were pretty good and speakers were knowledgeable.
- Presentation styles - holding attention of the audience for an hour+ is a skill. Compare both Duke Energy presentations, both covered similar materials, but I found myself reaching for my iPhone after the first 15 minutes of Steve`s presentation. Good practitioner but not an engaging presenter.
- Most sessions I attended were not "professional development"; in nature. Although speakers were okay, at the end of the day, I had to ask myself, what was it I learned today? Agile speaker assumed everyone was familiar with concepts. He did not address questions and didn`t really present concepts of Agile.  Change Management speaker was entertaining and had a lot of good "sayings"; about motivating team members, but can`t say it was presented in terms of project management. Perhaps a better description of "course"; content would help manage expectations.
- Though Brandon Lane was my favorite presenter (engagement with audience, knowledge of topic and targeted answers to questions), the most helpful session was mind mapping. I would like more sessions where content is usable immediately to make us more effective
- Not too much. A few of the presenters were a little dry and relied too much on PowerPoint.
- I ended up listening to two speakers that discussed Duke Energy`s program management. It would have been nice to hear about other companies or focus on different knowledge areas.
- Very good sessions and speakers.
- My only criticism is that I would have liked for some of the presenters to have held some questions until the end of their presentations. They were unable in some cases to get through all their content due to lengthy participant discussion that wasn`t focused on the presenters specific topic.
- Better speakers on change management. Edie was all over the place. Karen talked primarily to the front wall with little eye contact and offered.no new insights.
- Some of the presentations were great - some were OK.
- Start on time, make sure the speakers stay on time.

PDD Survey Overall Comments – Sessions & Topics

- I would like to see something on enterprise resource management of demand management or enterprise reporting/ PPM software
- Good diversity in the topics to select from, setting was very nice (and new!) which is different than the usual hotel; great pick!"
- I really enjoyed the event and felt it successfully packed in a full day of events.
- Maybe one session on IT project management specific issues
- I liked the format.
- (What would you change?) Make them more instructional. Better description of topic outlines. PMCOE discussion was okay, but was just a description of how someone else set theirs up. Would have preferred it be more generic and instructional.
- Not much - I really enjoyed all of the presenters and their efforts to make the most of the time that they had to work with.
- All of the speakers were great. I enjoyed the networking and learning.
- Handouts of presentation
- Definitely one of my lowest ranked PDD days. PDUs aside the value add in terms of good things to use as a PM was a lot lower than it should be. We really need to go past basic stuff and get into the more detailed content that can help us be better PMs. The Requirements and Control sessions were 101 level and really at too basic a level to be presenting at the PDD. I heard similar comments from colleagues at other sessions. If we want to elevate the profession we need to get better content and elevate this event. If it weren`t for the PDUs, I don`t think I`d attend again. I counted approx. 100ish people at the event given a membership of 1500 and approx. 15,000 PMs in Charlotte you have to ask why so few. Maybe lack of value/content is the issue.
- Consider adding a panel discussion at lunch with experts in different topics. Audience could submit questions prior to the lunch, during the panel discussion. Panelists could take 10 minutes to talk about their areas of expertise or present topics for audience to ask questions, spur discussions.
- Showcase more events surrounding new innovative technologies, practices, techniques rather than regurgitating PMBOK material.
- More information about the topics being discussed by the speakers prior to the session
- Thank you for having CPCC and agencies present it was really a packed day. It was an unexpected bonus to hear about PMI strategy from a board member well done!
- The format was good as well as the topics.
- I would love to see some workshops or presentations focusing on our PM soft skills. I liked hearing from PM in industries other than mine, maybe could add more of that. Overall, thank you!
- (What would you change?) More interesting sessions/presentation topics
- Would like to see a session on Quality and Six Sigma.
- I signed up for the networking opportunity and the PDUs, but I was very, very impressed with the quality and content of the presentations. I learned a lot!
- (What would you change?) Broader range of topics
- Would like the opportunity to receive a pdf copy of the PPT presentations used by the presenters, or a similar version, if required by their corporate policy.

PDD Survey Overall Comments – Venue & Layout

- Main room was cold.
- (What would you change?) Better location - especially keeping rooms on the same floor/more easily accessible. No auditoriums for keynotes.
- (What would you change?) A separate area to have lunch. Auditorium a little awkward.
- Eating lunch in a lecture hall was not ideal. It would be nice to have a facility with tables; round tables would have also encouraged more networking/discussion during lunch too.
- (What would you change?) Placed the food on the first floor where there was some seating outside of the bagel/coffee shop that was closed.
- With the food/beverage services being on the main floor and the sessions on the 6th floor it was difficult to make it back to the 6th in the time allotted during breaks to be able to get a bottle of water. If the drink machines on 6th floor had been filled, that when have been OK as well.
- Lunch was a bit of a struggle in the auditorium.
- Ac was too cool in large auditorium
- The facility was awesome! Especially with convenient parking.
- (What would you change?) Having tables to eat at (even if just standing up) for breakfast & lunch.
- The lunch offering was difficult to eat in the auditorium also no place to eat breakfast. Would have liked to see tables set up near the food. Everything else was awesome!
- Would not change anything, facilities were super!
- The logistics of eating lunch in the Auditorium were difficult. Tables would have been better for us to handle.
- More seating for lunch in the gathering area.
- Have table and chairs for lunch.
- I thought it was well laid out, time was well managed, and the facility accommodations and location were absolutely great!
- Better eating environment, too cumbersome to eat in the lecture theater not enough space.
- It was too cold in large auditorium.
- Somewhere to sit down and eat the meals.
- I really like the location at UNCC, it was comfortable and parking was easy.
- I like this location better than CPCC.
- The facilities were great - have all future PDDs at this UNCC location.
- The facilities were excellent - only objection was not being able to sit at a table for lunch other than going back to the lecture hall or classroom. For the next event, please post signs for where the parking is supposed to be - "PMI Park Here" for instance. Those of us not familiar with uptown Charlotte spent time circling the block trying to find it (I saw a couple of vehicles more than once). Otherwise this was the best of the 5 I`ve attended.
- Thanks for including parking for Uptown location. I am willing to find any location around Charlotte if I don`t have to hassle finding parking.
- A better venue for lunch would have been better. Lecture hall wasn`t ideal for eating.

PDD Survey Overall Comments – Food

- Consider a different food choice; tacos were hard and messy when eating in the lecture hall with such a small space.
- Snacks should include fruits and nuts, etc.
- Hot coffee or tacos a little difficult to juggle, although very tasty!
- We had Tex-Mex in 2013 too...
- Healthier breakfast alternatives - some protein and fruit. Due to the location for lunch (auditorium), recommend either a simpler hand-held type meal and cups with lids (perhaps from a sponsor?), or a different place to eat.
- Having bottled drinks would be nice too, even if it meant raising the price of the event. Trying to maneuver those small cups in the lecture halls and going up elevators was challenging.
- The only change is to provide coffee in the afternoon. Other than that I thought it was very worthwhile.
- Coffee in afternoon
- Might have some fresh fruit option in addition w/ the breakfast instead of only the heavy carb muffins.
- Coffee was good. Lunch was really good.
- The taco bar for lunch was one of the better conference buffets I have had.
- This has nothing to do with the events but I would either like to have more water/snacks available or be notified to bring our own. I know food adds to the cost so I don`t mind bringing my own but wasn`t sure if I could do so.
- Serve coffee in the afternoon
- Afternoon coffee / tea after lunch would have been good
- More snacks...some fruit with breakfast.
- Some non-bread breakfast items like bananas or yogurt or granola bars.
- I might suggest some lighter fare for lunch because the food looked heavy and may have impacted on people`s energy levels later in the afternoon.
- Please don`t serve tacos when I am eating from my lap. Would like to see fruit of yogurt at breakfast but understand costs are an issue.
- Coffee with the afternoon snack
- I would change the food offerings somewhat. Especially in the AM. Fruit and less sugary items would have been nice in the AM. The breakfast seemed to be very sugary and carb heavy offering.

PDD Survey Overall Comments – General & Multi-area Comments

- We should have the option also to listening session stand up instead seat down (all day).
- We should have recording option via web to see all sessions not just what we attended.
- "FABULOUS DAY!
- We need a little bit more time between sessions in case things run over...could you make the agenda sheet on a smaller sheet of cardstock?"
- Opportunities for networking. More vendors.
- I would change the Sign in process. It was hard to get everyone in the class room quickly.
- It was great
- No changes recommended.
- The day went well. Nothing to offer for improvement.
- Nothing. Location was good, parking was good, lunch/food location was good. Speakers were good.
- Get more sponsors/booths to provide more prizes or resources such as better afternoon snacks.
- Would not change anything.
- I like the idea of PMI sending in the PDUs and I know that there needs to be a way to capture the names so my suggestion is to have more than 1 person signing people into the sessions to move things along faster.
- Attendance marking for each class was too time consuming.
- If I could change anything, I would not have a Lunch Keynote speaker. I would use lunch as a networking hour.
- All in all great event with heavy hitter speakers. Thanks
- By the time we got to the end keynote, the audience was not as engaged. Maybe a schedule change?
- I thought it was a well thought out and designed conference. Nice venue, good lunch and great presenters.
- Great venue, great arrangements. Thanks for all of your efforts in putting this together.
- Nothing; all was well orchestrated.
- A very productive Professional Development Day. If we could have one or more of these days throughout the year; I would certainly be willing to attend. The cost was most affordable.
- I liked that you provided food and parking this year. Much more convenient. Although there wasn`t enough water bottles to go around at snack time. I know how hard these events are to produce, so thank you for your efforts.
- I am not sure if there is a way to pre-register for the sessions to avoid long lines before the sessions start. If one changes to a different session than only one the session that was manually check on that day can be credited. It is probably more work to compile but it can avoid missing an attendee.

PDD Survey Overall Comments – General & Multi-area Comments

- I liked having a working lunch so that we could leave at an earlier time.
- Nothing at this time
- The content, speakers, venue, food, duration, were all fantastic. Excellent execution!
- Even up the number of PDUS to 8
- I`d say everything was just fine.
- Nothing, everything was great!
- For my first PDD, it was great.
- All were perfect! Great Job!
- Thought it was well planned out and very organized. Topics varied giving everyone a chance to find something interested in. NICE JOB!!!
- Please send accros by e-mail the certificate/confirmation that we obtain the 7.75 PDUs. Thanks in advanced
- This was a very convenient and well organized day of learning. Thanks for all the effort that goes into this!
- "It was a good informative day!
- The food and location were wonderful and the program well done. I enjoyed the day and it took a lot of wonderful information away. Thank you and hats off.
- Love this PDD on Sat, otherwise, I couldn`t attend due to travel. Consider moving it to a weekend later in the fall/early winter when there isn`t as many other community events going on.
- I think Jennifer Baker did an outstanding job in creating the event and the momentum in the speakers introduced.
- Very well planned and executed!
- Thank you for keeping the price affordable.
- Back in 2012, you provided a small booklet for the event which introduced the speakers, gave more detail on each session. Could you please bring that back next year? That booklet was helpful in determining which workshops to attend and was a nice reference after the event.
- Overall, was very impressed with the event! I always look forward to PDD each year! Great learning and networking experience!! Having the event on the UNC campus was really nice, by the way!
- The location of the event and parking was great. The information supplied by CPCC and UNCC was good to have.
- Thanks to all the volunteers and the work put in who made the event go smoothly!! I liked the UNCC facility the best of the venues used in recent years.
- Free parking was great as was the lunch
- Very good event. No time wasted.
- I really enjoyed my day. There was a lot of good conversation, and great ideas. I like to network with others in the same field. The lunch was Awesome! I`m looking forward to next year.
- Other than the time between sessions not being long enough to take a break to get a beverage and restroom break, I really liked the venue. Hopefully, UNCC will be willing to host again!

PDD Survey Overall Comments – General & Multi-area Comments

- I thought it was a good event.
- Great organization, kudos to the volunteers!
- Great facility! Great speakers! "
- I thought the overall event was good. Checking in at each session was a bit time consuming. Perhaps you could use an electronic system or a "ticket"; system in which each person is given "tickets"; with their name and the session and they just drop them in a box rather than having a person check our names. It may be easier for all that way. Also, I`m not sure why a straight 8 PDUs was not provided rather than 7.75 PDUS.
- It was great. The sessions were not too long and there was enough time between sessions. I really enjoyed my time spent to volunteer
- It was a good day overall. Only think that really needed improvement was last speaker. Her presentation was scattered and not compelling.
- Each year gets better. Good job!
- Not at this time.
- Good food and great networking event
- The location was great, food was good, enjoyed the vendors. The only thing that sticks out in my mind was the temperature in the auditorium. Slightly cold during the keynote. Everything was wonderful!
- It was obvious to me that so much time went into such a well-organized event.   I appreciate all then efforts of PMI volunteers and will look forward to future events!
- Overall an excellent day. Thanks for all of the work pulling it together.
- Event was very well organized and professionally conducted
- The valuable part of the sessions was the interaction from the audience - validation of pain points and hearing different approaches to solving them. But it commonly takes a bit of time to draw the audience out in such a situation. Perhaps consider experimenting with a forum style presentation next year.
- Overall great job!! Well-coordinated event.
- Well Organized.   Good facility. Liked multiple large sessions.
- Thank you for making a valuable day. I really appreciate it.
- Excellent Program!
- Great event. I liked the topics discussed and learned a good amount to apply in my company.
- Thanks for putting on another great event!
- The facility was perfect for this event. The range of topics and flow of the agenda were very good as well, and stayed on time. There was still time for great networking. I was very pleased with this event. It was a great investment of my time and investment.
- Overall good job by the PMI. UNCC was great location and venue. Price was good as well. Thanks for putting together a great day.
- Well done!
- Getting into the events took a while. One person suggested we may try a bar code scanner at the doors. Guest had to line up to get their names checked off for sessions and the keynotes. Some even came in the other doors. I could have been slow checking mine off too.
- Check-in at each session was long.

Corporate Partnership

	Chapter Partner Limit 1 per month	Network Partner	Web Partners
October 2014	UNCC	Collabera, CPCC, TekSystems, Vircon	WCU, CVCC, Point Advantage
November 2014	UNCC	Collabera, CPCC, TekSystems, Vircon	WCU, CVCC, Point Advantage
December 2014	N/A (No chapter meeting)	N/A (No chapter meeting)	WCU, CVCC, Point Advantage, Collabera, CPCC, TekSystems, Vircon
January 2015	Reserved for UNCC	TBD	TBD

Proposed 2015 Meeting Dates

			January	February	March	April	May	June	July	August	September	October	November	December
			1/1/2015, 1/19/2015	2/12/2015, 2/14/2015, 2/16/2015		4/5/2015	5/10/2015, 5/25/2015	6/14/2015, 6/21/2015	7/4/2015		9/7/2015	10/12/2015, 10/31/2015	11/3/2015, 11/11/2015, 11/26/2015	12/25/2015, 12/31/2015
Chapter Meeting	Byron's	3rd Tuesday	1/20/2015	2/17/2015	3/17/2015	4/21/2015	5/19/2015	6/16/2015	7/21/2015	8/18/2015	9/15/2015	10/20/2015	11/17/2015	
BOD Meeting	NWN	2nd Tuesday	1/13/2015	2/10/2015	3/10/2015	4/14/2015	5/12/2015	6/9/2015	7/14/2015	8/11/2015	9/8/2015	10/13/2015	11/10/2015	12/8/2015
Asheville	WCU - Biltmore	3rd Monday	1/19/2015	2/16/2015	3/16/2015	4/20/2015	5/18/2015	6/15/2015	7/20/2015	8/17/2015	9/14/2015	10/19/2015	11/16/2015	
Ballantyne	Wingate - Ballantyne	1st Tuesday	1/6/2015	2/3/2015	3/3/2015	4/7/2015	5/5/2015	6/2/2015	7/7/2015	8/4/2015	9/1/2015	10/6/2015	11/3/2015	
Fort Mill	YMCA	1st Tuesday	1/6/2015	2/3/2015	3/3/2015	4/7/2015	5/5/2015	6/2/2015	7/7/2015	8/4/2015	9/1/2015	10/6/2015	11/3/2015	
Gastonia	Round Bistro	3rd Monday	1/19/2015	2/16/2015	3/16/2015	4/20/2015	5/18/2015	6/15/2015	7/20/2015	8/17/2015	9/14/2015	10/19/2015	11/16/2015	
Hickory	CVCC	4th Thursday	1/29/2015	2/26/2015	3/26/2015	4/30/2015	5/28/2015	6/25/2015	7/30/2015	8/27/2015	9/24/2015	10/29/2015	11/26/2015	
WLKN	Midtown Sundries	2nd Thursday	1/15/2015	2/12/2015	3/12/2015	4/16/2015	5/14/2015	6/11/2015	7/16/2015	8/13/2015	9/10/2015	10/15/2015	11/12/2015	
Huntersville	Fox & the Hound	4th Thursday	1/29/2015	2/26/2015	3/26/2015	4/30/2015	5/28/2015	6/25/2015	7/30/2015	8/27/2015	9/24/2015	10/29/2015	11/26/2015	
Mooresville	Lone Star	1st Thursday	1/8/2015	2/5/2015	3/5/2015	4/9/2015	5/7/2015	6/4/2015	7/9/2015	8/6/2015	9/3/2015	10/8/2015	11/5/2015	
Concord	Garrafalo's	3rd Thursday	1/22/2015	2/19/2015	3/19/2015	4/23/2015	5/21/2015	6/18/2015	7/23/2015	8/20/2015	9/17/2015	10/22/2015	11/19/2015	
Fayetteville	Lone Star	3rd Saturday	1/17/2015	2/21/2015	3/21/2015	4/18/2015	5/16/2015	6/20/2015	7/18/2015	8/15/2015	9/19/2015	10/17/2015	11/21/2015	
Jacksonville	SAIC Office	1st Saturday	1/3/2015	2/7/2015	3/7/2015	4/4/2015	5/2/2015	6/6/2015	7/4/2015	8/1/2015	9/5/2015	10/3/2015	11/7/2015	
Wilmington	Library	3rd Saturday	1/17/2015	2/21/2015	3/21/2015	4/18/2015	5/16/2015	6/20/2015	7/18/2015	8/15/2015	9/19/2015	10/17/2015	11/21/2015	
Boone	ASU Student Union	Tuesdays - varied					N/A	N/A	N/A					
LIM Events					3/19/2015 thru 3/21/2015							10/22/2015 thru 10/24/2015		
PMP Prep Classes														

Items in yellow are close to a holiday

Items in bold blue italic are tentative.

Programs Organization

Metro Satellites	Non-Metro Satellites	Other Programs
Ballantyne – (Karen McIntosh-resigned effect Y/E) Boutros Awad, *Co-Chair Vacant (Role posted)*	**Asheville** – Gary Jarvis, Elizabeth Schell	**Skill Fest** – Ruby Dease *(Transitions to Marketing)*
Concord – Todd Foulks, Debra Donaldson, Bob Carter	**Fayetteville** – Heidi Schafer, *Co-Chair Vacant (Role posted)*	**PDD** *(Transitions to Professional Development. Roles posted)*
Fort Mill – Norelis Florentino, Phyllis Sills	**Hickory** – Jennifer Helton, John Cansler	**Mentoring** – Mark Cichonski *(Transitions to Professional Development. Role posted)*
Gastonia –Diana Register, Susan Bumgardner	**Wilmington** – Mary Anne Taylor, Janis Thomas	**Administration** – John Rush, Ray Daines
Huntersville – Carl Rombolo, Ronda Elsea	**Jacksonville** – James Cole, Julie Shambaugh, Andria Davis	**Partnership** – *Vacant (Transitions to Marketing. Role posted)*
Mooresville – Mario Bernadel, Nirav Pancholy	Other member volunteers in this area include: Tracy Schmidt, Collette Collins, Jonathan Mayhorn, Lori Lamprecht, Amanda Scott, Jennifer Smith, Russ Darnall, Tom Cooper, Vanessa Springs, Michael Johnson, Ray Daines	
WLKN – Tom Gray, *Co-Chair Vacant (Role posted)*		

MEMBERSHIP

ISSUES

Membership knowledge transfer
Finance knowledge transfer

Needing Assistance/Input

Volunteer Recognition Event
Venue has been chosen, menu sent out. Need responses from your members for attendance as per my email to the Board

Robin is asking other Chapters to see if they may already have a survey for exiting members before we create one for Metrolina

Civic Volunteering (VOICE)
Volunteer Outreach Initiative for Community Experiences
2014 Calendar of Events

Target Dates		Event Title/Organization	Objective	Contact Person	Status
Month	Day				
August	No Event Planned				
				TBD	

Membership Survey

Registration

Sheetal is working on her 2nd in command for the registration desk.

Misc

3816	Satellite Co-Chair	Posted
3963	Mentoring Chair	Posted
3817	Corporate Partnership Chair Person	Posted
3431	Communications Website Designer	Posted
3432	Communications Newsletter Editor	Posted
3433	Communications Marketing Assistant	Posted
3434	Communications Graphic Designer	Posted
3962	2015 PDD Planning Committee	Posted

Monthly Membership Levels
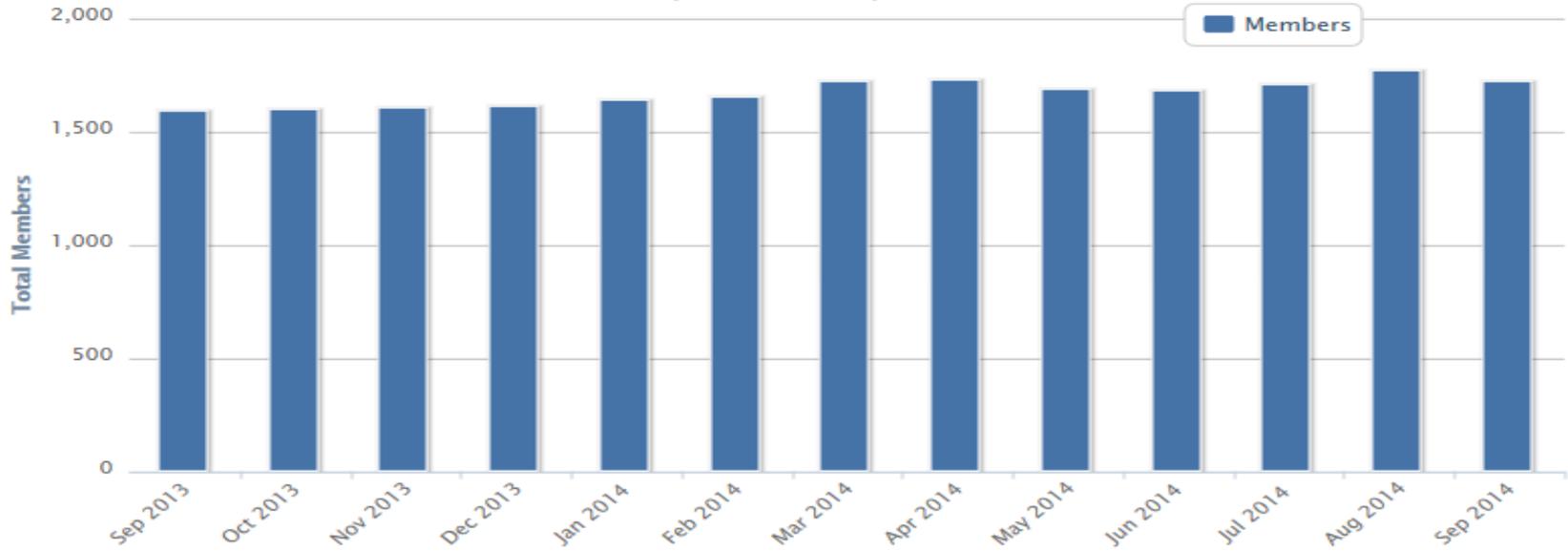
Date	Total Members
September 2013	1593
October 2013	1600
November 2013	1608
December 2013	1616
January 2014	1637
February 2014	1656
March 2014	1725
April 2014	1730
May 2014	1691
June 2014	1681
July 2014	1706
August 2014	1768
September 2014	1726