

MILESTONES

ORANGE COUNTY CHAPTER OF PMI

1991, 1992, 1993, 1995 & 1997 CHAPTER OF THE YEAR

SEPTEMBER 1998, Volume 10, Number 9

1998 CHAPTER BOARD

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September 8th Meeting

A Joint Meeting with the Southern California
Section of AACE

RESOLUTION OF DISPUTES: THE NEXT GENERATION

JAMES G. ZACK, JR.

*Vice President and Director
PinnacleOne Institute*

OVER THE PAST THREE DECADES it became routine to resolve construction disputes, both large and small, in courtrooms. Countless millions of dollars and person hours have been expended in these efforts; none of which added any value to the constructed projects. However, a major change in the construction dispute paradigm has been taking place over the past few years, spurred on by high costs, crowded court dockets, and a lack of both judges and courtrooms. This change has also arisen from a realization that there are no real winners in courtroom battles. Construction disputes throughout the remainder of the 1990's and into the next century are more likely to be resolved in some alternative dispute resolution forum than in a courtroom. This month's program surveys nineteen forms of alternative dispute resolution currently in use in the construction industry and identifies the advantages and the disadvantages of each.

James Zack, Jr., CCM, PMP, is Vice President and Director of the *PinnacleOne* Institute at their Irvine office. He has over 25 years of experience in dealing with construction claims, and extensive experience representing owners as an expert witness.

Don't miss this opportunity to learn new and innovative approaches to resolving construction disputes and to network with members and guests of PMI and AACE!



California State University Northridge

PMP EXAM WORKSHOP

To Begin in October

The classes are taught in two four hour sessions each day, over six Saturdays. Each session focuses on one of the chapters of the Guide to the Project Management Body of Knowledge (PMBOK). A final session provides a review and practice exam.

The first class will begin Saturday, October 24. Subsequent classes will take place Saturdays in November (7, 14, 21) and December (5, 12). The classes will be held at the Executive Training Center at California State University, Northridge.

Cost for the six day workshop is \$300 per person for members; \$400 for non-members. A comprehensive student workbook is included.

A \$50.00 deposit to confirm your reservation is due by October 2; the remainder is due at the first class.

For more information, contact Mike Wakshull at (805) 529-4610 or email: mwakshull@aol.com. Or call Charles Lopinsky, PMP, Workshop Coordinator at (310) 318-6906.

PMI WEB SITE

The Orange Country chapter web site is now updated. Please visit <http://www.pmi-oc.org> often for meeting information, coming events, new *Milestones* articles and to reserve your place at the meeting on-line!

LAST MONTH I mentioned that our PMI Orange County Board of Directors had decided to create a new annual award to thank a local (non-Board) member who had given exceptional volunteer service to our Chapter. We will make this award at our dinner meeting each December, and will call it the "PMI Orange County Julie M. Wilson Volunteer of the Year Award."

I could not mention Julie Wilson by name last month because I did not yet have her permission to use her name. After several email messages I was finally able to catch up with Julie after her trip to Scotland. She called me and gave us permission, and also said she was thrilled. I personally cannot think of any single individual who has given more time and energy to this chapter than Julie, and it is appropriate that we honor her also by using this designation.

Speaking of awards, I am pleased to announce that on July 9th Dr. Lew Ireland, PMI National President notified us that PMI Orange County has again been designated to receive the "1998 PMI Chapter Sustained Superior Performance Award." We have received this award several years running, and it comes as no surprise to me. Our last meeting was perhaps the best PMI Chapter meeting I have ever attended . . . anywhere. Seventy-five people came out, in July, when most other chapters are dark for the summer! Truthfully, I still have no clue as to what goes on with software projects, but it was not the fault of our panel members who gave us outstanding presentations on this difficult subject.

Our Chapter has set a goal for itself: as soon as possible we want to go to electronic communications with our 395 local members to the greatest extent possible. We are not sure just exactly when this can be achieved, but we want to get there at the earliest time.

To date we have established an electronic meeting announcement which is sent out each month from Ron Stein at PTS Staffing. If you presently are not receiving this monthly announcement please send a request to RStein@PTStaffing.com and he will be most pleased to add you to this list.

Also, thanks to Keith Reynolds, we have also created our own PMI Orange County website at www.PMI-OC.Org which is presently operational. Each month as you receive the monthly meeting announcements from PTS, we suggest you then go to our website to read the newsletter announcement. Exactly when we might be able to discontinue our postal mailings is not clear. Perhaps in 1999 or 2000. Until all of our members feel comfortable with electronic communications, we cannot eliminate the postal mailings.

Wouldn't it be ironic if our Chapter went over to all electronic communications in 1999, only to have the "Y2K" issue shut everything down on January 1, 2000! Should that happen, missing our PMI Milestones issue would likely be the least of our problems.

See you at our next meeting on September 8th . Bring your business cards and plan to meet ten new members you presently do not know.

Quentin Fleming

MARTY WARTENBERG

TRUSTEE

I JOINED PMI ORANGE COUNTY many, many years ago at the urging and insistence of Julie Wilson. She assured me that all I would have to do is show up once a month for a social evening of drinking and dinner and a few minutes of speech making that I could just ignore. Needless to say, I was shocked to discover that what awaited me was many assignments, positions and a lot of work. After several years as an active member, then drafted into the Public Relations Director, job, then the Programs Director Job, and then the Presidency (For which John Beatty also assured me that it was a piece of cake) I now can truly relax as a Trustee. Somehow as I get older, I don't get any smarter and each one of these activities seems to take on a life of its own. I'm looking forward to just being a member again and coming to the meetings just to enjoy the social aspects. I've managed to "con" a few really bright and energetic people, like Adrienne Keane and Pat Alexander to carry on the torch and do all the work.

My path to Project Management was through the engineering ranks. I graduated from the City College of New York with a degree in engineering and after several years of real work, was picked to run a special project, like most of us, I was in the wrong place at the right time, or the right place at the wrong time. Over the years I moved from functional organizations back to project management, into program management and then back to functional organizations. It should be apparent that I spent a lot of time being confused. After almost 35 years working in the Industrial sector, I joined the University of California, Irvine Extension Department. I was recruited by Lori Munoz Reiland to help sell and deliver courses into companies in the Orange County Area. We also worked together to develop a Project Management Program at UCI with the help of the PMI Orange County Chapter. This effort has grown also from the relaxing effort of just enough work to stay out of trouble, into a major program being delivered both on and off campus. Some how I just can't seem to figure out how to stay away from work.

In addition to my activity at UCI, I have been conducting a moderately successful consulting practice, which keeps me off the streets and out of trouble. My only hobby at the moment is taking off every Friday and helping my wife take care of our brand new grand daughters. I think I will start planning my next career and hopefully build in more leisure time.

LONG BEACH, CA, USA
9 - 15 OCTOBER 1998

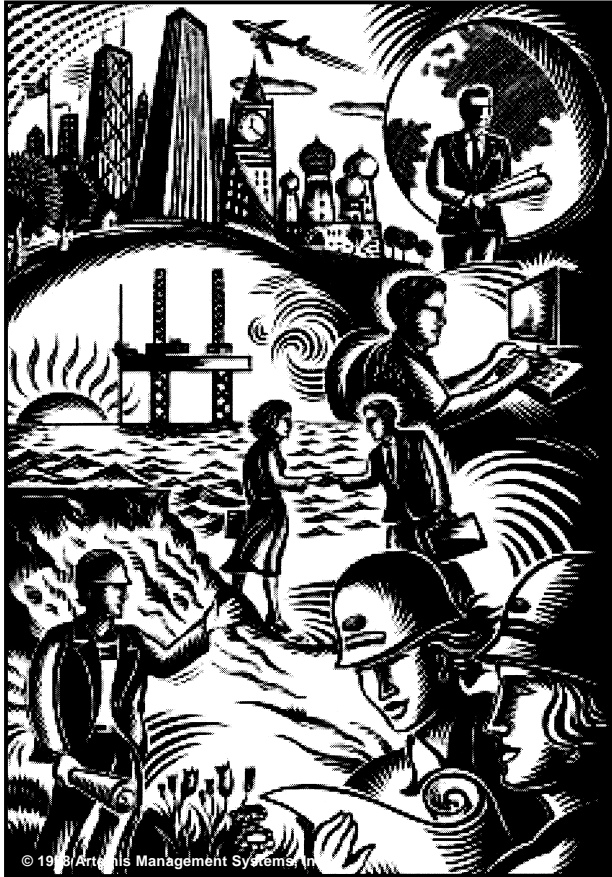


GOING TO LONG BEACH FOR PMI '98??

The Los Angeles and Orange County Chapters of PMI are co-sponsoring the PMI'98 Seminar/Symposium. You can help make this the best Symposium ever — Session Monitors are needed for the Symposium paper presentations on Monday, Tuesday, and Wednesday.

Registration for the PMI'98 Seminar/Symposium is now available online at www.pmi.org.

To volunteer—or for a volunteer job description—visit the web site or contact Janet Mentzer at jmentzer@usa.net or (310) 540-0128.



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PRIMAVERA
How the world manages projects

SUCCESSFUL CONTRACTING TECHNIQUES FOR PROJECTS

PAUL MCDONALD, Vice President of the American Graduate University gave us another valuable insight into a facet of project management that we often take for granted. Paul took us through the entire contracting process, starting with the pre award activity and various legal definitions of the contract including; *Participation by at least two parties with legal capacity to act, there must be an offer and an acceptance with sufficient consideration and clear terms, it must not include acts that are against the law and must fit within the body of contract law.*

The key part for many of the interested participants was the relationship of project management and the contracting function. Paul made it very clear that the responsibility for meeting the contract requirements was in the hands of the project manager. It therefore makes it very important, if not critical, that the project manager understands and be part of all phases of the contract process from formulation through negotiations and for all changes.

Another subject of interest was the various contract types and where they should be used. Factors affecting the type of contract include: *Nature of the work, Risks, Period of Performance, Range of Costs, Stability of Requirements, Adequacy of the SOW, Technology, Complexity and the Urgency of the product or service.* Based on these considerations the two parties should select the type of contract most fitting to meet the requirements for both parties. These included; CPFF, CPIF, CPAF, Cost (No Fee), Cost plus % of cost (Not allowed by governmental agencies) and various types of fixed price, including; Firm Fixed Price, FFP with Economic adjustment, Fixed Price Redetermination, FP with Incentive and FP with Award Fee. Paul briefly covered the various other types of contractual relations including; Time and Materials, Letter

contracts, BOA, Multi Year and several others. It came as a surprise to many as to the sheer number and options you have in selecting a contract type.

Paul stressed the importance of the SOW and obtaining the clearest and unambiguous requirements and definitions prior to entering into a contract. He stressed the critical nature of selecting the right words and phrases to stay out of trouble. The last subject covered was in the world of contract changes and modifications. He stressed the importance of change control and documentation of the changes and impacts.

Thanks again to Paul for an enlightening and entertaining session on what some people believe is a not so interesting subject.

Marty Wartenberg

ARE YOU INTERESTED IN THE PMP EXAM?

The next review session starts on Feb. 6, 1999 and we need volunteers in the following areas:

Registration

Contact person for potential participants

Marketing

Make sure the word gets out to those who need to know

Instructors

Talk about your favorite subject! PMP preferred

Classroom Manager

Keep the troops fed and the lights turned on

Procurement

Acquire workbooks and supplies

We are planning the session now. If you would like to get involved, call Janice Preston 949.859.7004 or JYPreston@aol.com.

- Pat Alexander
- Bob Bazargan
- Myrna Bravo
- John Bing
- Debbie Dexter
- Ed Fern
- Warren Nogaki
- Frank Reynolds
- Gwen Vangelisto
- Julie Wilson

Project Management Institute
<http://www.pmi.org>

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<http://www.pmi-oc.org>

San Diego Chapter
<http://www.pmi-sd.org>

Project Management Forum
<http://www.pmforum.org>
[PMForum/welcom.htm](http://www.pmforum.org/PMForum/welcom.htm)

Search Engines

<http://home.netscape.com/home/internet-search.htm/>

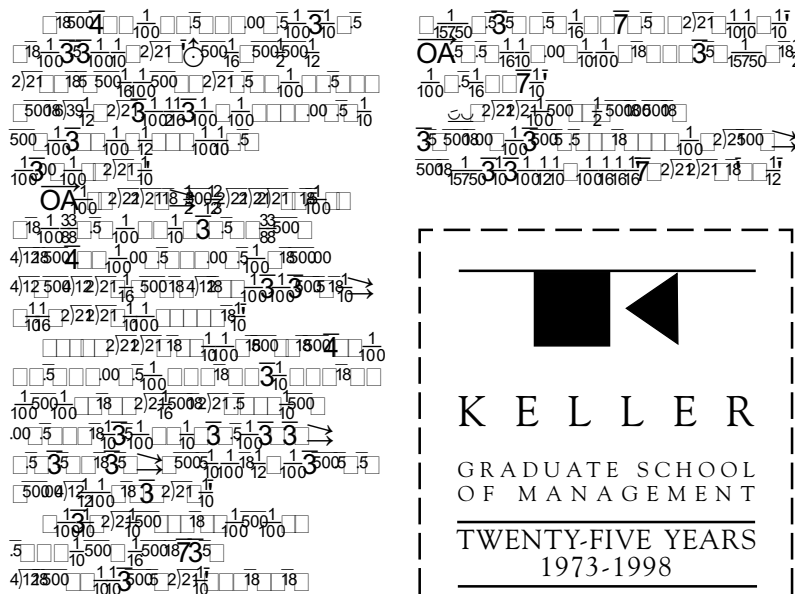
PMI-L.A. Chapter
<http://www.pmi-la.org>

Microsoft Project Users Group
<http://www.mpug.org>

Primavera Users Group
lmcnatty@drmcnatty.com

If you would like to make an E-mail announcement to all PMI members, contact **RStein@PTSStaffing.com**.

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MONTHLY DINNER MEETING

TUESDAY, SEPTEMBER 8, 1998

A Joint Meeting with the Southern California Section of AACE

Location: Holiday Inn

2726 Grand Avenue, Santa Ana

Next to the 55 Freeway at the Dyer Road Exit
(Between the 5 and the 405)

Time: 5:30-6:20 Sign-In and Networking

6:20-7:30 Announcement, Dinner,
Break (at your leisure)

7:30-8:50 RESOLUTION OF DISPUTES:
THE NEXT GENERATION

James G. Zack, Jr.

Vice President and Director

PinnacleOne Institute

8:50-9:00 Final Remarks, Adjourn

Cost: In Advance Members \$25.00
Non-Members \$27.50

At the Door Members/Non-Members \$30.00

For information: Call Adrienne Keane at 714-816-3813



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ADVANCE REGISTRATION FORM *August Meeting*

Please enclose either \$25 or \$27.50

Name: _____ Company: _____

Address: _____

City, State, Zip: _____

Please provide a receipt: ~ Mail to: PMI-Orange County

Vegetarian meal requested: ~ P. O. Box 8026
Newport Beach, CA 92658-8026

How to register: You may mail your registration or fax it to: Adrienne Keane at 714-816-3822

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange Country Chapter of the Project Management Institute. The purpose of the publication is to notify members of meetings, Chapter activities, member accomplishments and to provide information regarding project management in local businesses and Government agencies. Advertising is welcomed; however, its publication does not constitute endorsement by the Chapter or the Project Management Institute.

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