



PMI-OC
VISION

► We are recognized as the volunteer organization of innovative project management professionals. We provide value to our stakeholders and the community at large. We promote the development of project management as a benefit in all industries.

PMI-OC
MISSION

► We promote project management by providing services, tools and knowledge to project sponsors, project managers, team members and the community. We provide a forum for networking and opportunities for social interaction.

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OCTOBER 15TH PMI-OC PRESENTATION

**Global Leadership
for Project Managers**

By Charles Bergman, Meridian Resources Associates

All businesses today are global, as are the great majority of projects. And since culture is an essential component of the global economy, it has a profound effect on every aspect of business today. From an engineering perspective, the cultural component of business has emerged as the third side of a critical engineering triangle. The first side is traditional engineering, that is, building things. A visual image of this is "welding steel." The second side of the triangle is software engineering. An example of this is "writing Windows 98." The third side of the triangle is human engineering across disparate cultures. This type of engineering is best thought of as "changing the way we think."

Because the cultural, or "human engineering," component is so critical to any global project, project managers today must be able to answer the question, "How does culture affect leading and managing projects in a global context?"

Our speaker, **Mr. Charles Bergman**, will address this question by focusing first on intercultural sensitivity and awareness, and how human behavior differs across cultures. Mr. Bergman will then present cultural proficiency as a key project management discipline. Here he will outline a powerful method of analyzing dimensions of culture that can be used to solve a variety of culture-based impediments to project completion. Mr. Bergman will also present a set of critical cross-cultural skills that can be valuable additions to a project manager's toolkit. These include effective communication, establishing credibility, obtaining accurate information, and ensuring productive meetings and conference calls.

Mr. Charles Bergman is a principal at Meridian Resources Associates, a San Francisco-based global consulting firm. He leads Meridian's China practice, and has been involved with China for over 20 years. Mr. Bergman's current work focuses on leadership and organization development for Western and Chinese companies in China. Mr. Bergman is also a member of Meridian's design team for web tools, creating products that complement Meridian's service offerings.

Prior to Meridian Resources Associates, Mr. Bergman worked for 10 years with IBM both in the U.S. and in Asia. He is currently working on a book with a Chinese co-author focusing on successful strategies for U.S. businesses in China.

Mr. Bergman has a B.A. in mathematics from Amherst College, an M.S. in mathematics from the University of California at Berkeley, and an M.A. in East Asian Studies from Stanford University.

Vendor Showcase:
Meridian Resources Associates
www.meridianglobal.com

NEW PROJECT MANAGEMENT PROFESSIONALS

Miles Baker	PMP-#39206
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Pradeep Chaphalkar	PMP-#51981
Sridhar Chunduri	PMP-#50411
Jeannette Hall	PMP-#53543
Min Lee	PMP-#52897
Tara Prosser	PMP-#49554
Judy Quenzer	PMP-#52996
Jayaraman Ramakrishnan	PMP-#52998
Ravikumar Ramamurthy	PMP-#53549
Glenn Searle	PMP-#53754
Anna Warner	PMP-#53370
David Wine	PMP-#53065

New PMI-OC PMPs: 13
Total PMI-OC PMPs: 285

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THE PRESIDENT'S COLUMN



I want to use this month's President's Column to talk about PMI's Educational Foundation. The Educational Foundation is an autonomous, non-profit, charitable organization dedicated to promoting project management for the benefit of society at large. This means it is separate legal entity from PMI, but it is closely affiliated with PMI. Its purpose is to promote economic, educational, cultural, and social advancement through the application, development, and promotion of project management concepts, theories, and life skills. The Educational Foundation is run by a seven-member board made up of project managers, public interest representatives, academic and industry professionals.

The Foundation sponsors scholarships (one of them from PMI-OC in honor of **Charlie Lopinsky**), develops programs for primary, secondary, and college level educational institutions, as well as human services, charitable organizations and researchers. They have developed Tools-for-Life kits with tools and templates and programs that can be used by students and educators. They have also developed presentations, career day sessions and games to introduce project management to children.

If you visit the web site at www.pmi.org/pmief you can explore more about the Foundation. I enjoyed checking out the Learning Zone. The Learning Zone has the following:

- An Introduction to A Framework for Project Management: An online mini-course on the fundamentals of project management
- Life Skills Initiative: An overview of one of the foundations long term projects
- Project Management: A proven process for success: A narrative about project management and its benefits.

I found this area to be very helpful when trying to explain project management and PMI to my friends.

Currently the Education Foundation is working on several initiatives, including an Educational Enrichment initiative and a Career Day initiative. They also have annual programs for scholarships, grants, awards and research studies.

Since the Educational Foundation is not part of PMI, they are not funded by your dues. If you would like to contribute your time, money or energy to the Educational Foundation, I am sure it would be much appreciated. You can call Walter Childs at PMI at: 610-355-1659 or e-mail him at: walter.childs@pmi.org.

*Best Regards,
Cyndi Snyder, PMP*

SCHOLARSHIP FOR CHARLIE LOPINSKY

PMI Orange County has donated \$2000 for a scholarship in **Charlie Lopinsky's** name. Charlie was a PMI Fellow and a long time member of the Orange County Chapter. He passed away in February. The scholarship will be managed by the PMI Educational Foundation. It will be awarded to an Orange County resident for a graduate or undergraduate program.

VOLUNTEER OF THE MONTH

David Stiles, PMP, Honored as Volunteer of the Month

A resolution was unanimously passed at the August Board meeting of your Chapter designating **Dave Stiles** as the **Volunteer of the Month for August**. Chapter Volunteer Coordinator **Brent Felsted** honored him at our September 2002 general meeting by presenting him with a Certificate of Appreciation.

Dave has been a member of the chapter for approximately four years. Volunteerism is nothing new for Dave. He is currently active in several professional organizations including the Los Angeles Chapters of the Association for Information Technology Professionals (AITP-LA) and Southern California Quality Assurance Association (SCQAA-LA).

He serves on the board of directors of both organizations. Notwithstanding the demands of his time volunteering for these organizations Dave unhesitatingly took on the demanding task of chairmanship of the Educational Conference and Vendor Showcase held on August 10, 2002. PMI-OC was one of the co-sponsors of this event. Dave's efforts involved coordinating vendors, site management, creating the agenda and schedule and preparing an article for the September *Milestones* highlighting the events of the Conference. And if that wasn't enough, he volunteered his time for the PMI semi-annual Association of Presidents (ACP) Leadership Conference held in Costa Mesa last March.

Dave is an independent consultant specializing in software development project management. He is currently under contract with NANOGEN, a biotech company in San Diego that is developing genetic testing devices. His role for NANOGEN is Project Manager for the development of the User Interface Software. Over the years, Dave received his MBA and has been a part time college instructor. He obtained his PMP in January 2002.

We asked Dave what volunteerism means to him:

"The PMI-OC board and its members are a great group of professionals, and the chapter is one of my all time favorite associations. My chairmanship for the conference in August was a pure project management assignment. It was good to have the cooperation of many associations, including PMI-OC this year, which made the conference better than last year. I am sure that PMI's partnership in the event is a long-term commitment, which will make it an even better event next year."

Dave Jacob



August Volunteer of the Month Dave Stiles (left), with Volunteer Coordinator Brent Felsted.



PMP PDU Continuing Certification Requirements

- Q. I was awarded PMP Certification in April. Do I have to wait until 1 January of next year to begin earning PDUs?
- A. *No. PMPs are encouraged to begin participating in continuing education activities as soon as possible after their certification. For example, if a PMP's certificate reads 3 June 2000 – 31 December 2003, the three year cycle is from 1 January 2001 – 31 December 2003; however, he/she may begin earning PDUs any time after 3 June 2000. This applies to a PMP's first Continuing Certification Requirements cycle.*

July 23, 2002

PDUs can be earned/calculated/accumulated at any time between the start date and end date of a PMP's Continuing Certification Requirements cycle as listed on their certificate. A PMP's initial certification will have three full calendar years PLUS whatever amount of time that was left in the year they became certified.

*Mr. Adam Potts
Project Management Institute
Certification Program Associate*

*Mike Beard
VP Professional Development, PMI-OC*

PMI-OC Members in the News

PMI-OC has always maintained a close relationship with the excellent PM training program at UCI Extension. Many of UCI's instructors are members of the PMI-OC Chapter. On September 10th PMI-OC member **Janice Preston, PMP**, was honored with the Dean's Outstanding Service Award. Janice has been instrumental in improving the quality of the UCI program over the past years. She manages the Advisory Committee, has undertaken revising the core courses for consistency and is a sought after instructor for many of the courses.

*Share your accomplishments with us.
E-mail kristine_munson@hotmail.com.*

BREAKFAST ROUNDTABLE

The August 27, 2002 PMI-OC Breakfast Roundtable Meeting was a strong success again this month.

A most satisfying surprise was that after the meeting, as I was returning to the table from paying my bill and after the meeting had been officially adjourned for over five minutes, no fewer than 10 of the 14 total attendees were still seated, having discussions with other attendees, with no sign of leaving. PROJECT MANAGEMENT KNOWLEDGE TRANSFER WAS HAPPENING HERE.

There were 14 attendees in all. Four were not PMI Members (but I think they were getting their checkbooks ready), five PMPs, two new within 60 days. Company size representation was: four attendees from one to 10 employees, two from 11 to 100 employees, four from companies with 100 plus, and four were seeking new positions. Five have been project managers from two to five years, nine for six years or longer.

A short poll indicated four of the attendees would prefer to attend meetings in South County; Mission Viejo was mentioned. Interested organizers and prospective moderators should come to the next meeting and make themselves known.

The three main topics discussed, selected by group demand, were:

1. How do the roles of Project Manager and Business Analyst overlap? Should they? How to segregate?
2. Help a newcomer, non-PMI member, discuss and define his new company's "process" only to reveal, under analysis and discussion, that it really was probably more like a program with a number of unique projects; therefore lending itself to project management practices in many areas.
3. With a sponsor or employer with a project management job who is vague or unknowledgeable about the scope, projected schedule, or projected budget, how does the prospective Project Manager discover the info before committing or backing away, if you can? What questions should be asked? How do you avoid sounding dumb?

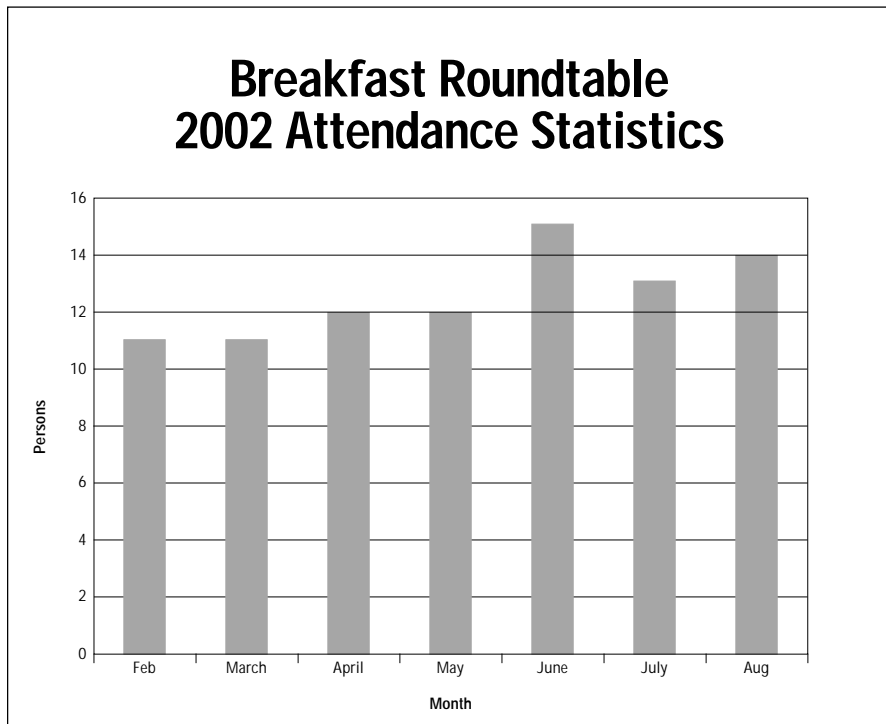
Discussions of the above included topics of estimating, sizing, assumptions, ranges, constraints, exclusions from scope, versioning, and much more.

A subject holdover that will compete for discussion time at the September 20th (fourth Tuesday of the month) meeting is: The Role of Dedicated Scheduler: Should it be done? How does the role interact with the role of the PM? What are the issues to be decided?

Join us the fourth Tuesday of each month between 7:15 a.m. announcements, 7:30 a.m. to 8:30 a.m. discussion of the topics and after that, networking and small group private conversations and departures to work.

Those wishing to attend should REGISTER at <https://www.quickbase.com/db/74hk779i>. If you have questions or comments, e-mail tsippl@PacificLife.com. See location and other details at www.pmi-oc.org.

Tom Sippl, PMP



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I'm not sure where we stand
on the ones we have..."**

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I took my PMP examination today and passed with a score of 158 out of 200! My score was very close to the average scores I attained using PM-Prepare. I couldn't have done it without you! Your sample questions helped me focus on the areas I needed to learn more about, and were instrumental in preparing me for a four hour, 200-question exam. The exam was harder than I'd expected. I never could have passed it without PM-Prepare! Thank you for helping me achieve my PMP!

Jay Burris
Huntington Beach, California

VISIT

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LESSONS LEARNED FROM MARS MISSIONS

September Dinner Meeting

At the September dinner meeting, **Jerry Suitor** of Jet Propulsion Laboratory (JPL) spoke of two spacecraft that were lost due to mission failures in September and December 1999. Dr. Suitor described the missions of each spacecraft, the probable cause of the failures and the resulting findings from various incident investigations.

Dr. Suitor described the role of the Project Manager as someone providing project leadership. He stated that sometimes a Project Manager must stand up, take their lumps and learn from failures. All projects contain a certain amount of risk, and the amount of risk is commensurate with the magnitude of the project and the significance of unknowns in the project. As you can imagine, the unknowns involved in landing a spacecraft on Mars are immense. The Project Manager's job is to manage, not avoid, the risk and complete the project successfully. Sometimes, however, the Project Manager must accept failure and learn from it.

The mission objective of the two spacecraft was to collect and return to Earth science data resulting from the in-situ and remote investigations of the Martian environment by the Lander and Orbiter spacecraft. Mars Climate Orbiter was launched first in December 1998 and lost. Upon investigation, it was determined that the root cause of failure was that one team used English measuring units (e.g., inches, feet, and pounds) while the other used metric units for a key operation.



September PMI-OC dinner meeting speaker
Jerry Suitor (right) with VP Programs Judy Quenzer

The incompatibility in measuring units was the "smoking gun," but as Dr. Suitor explained, the reality was that there were many smoking guns. "People sometimes make errors. The problem here was not the error. It was the failure of NASA's systems engineering, and the checks and balances in our processes to detect the error."

Mars Polar Lander, the second spacecraft, was launched on January 3, 1999 and also lost. The apparent root cause for this failure appeared to have been premature shutdown of the descent engines. With the world watching and two failures, "help" in identifying and correcting the problems came from many sources.

The Corrective Action Process followed by JPL included the following steps:

- Initiation and Substantiation
- Review and Assignment
- Plan and Action
- Review and Assessment
- Close Out

The multiple smoking guns uncovered for the failures have general applications for most projects. Some of the ones discussed included:

- Employee Training
- Operation Readiness Testing
- Problem Reporting, Tracking and Closeout
- Project-Line Interaction
- Team-to-Team Communication and Understanding
- Effectiveness of Reviews
- Program/Project Implementation
- Project Management/Project Management Capability
- Communications Among Project Elements
- Verification and Validation Process
- Faster Better Cheaper Process Description
- Relationships and Interfaces
- Evaluation, Selection and Oversight

The results for the Mars program became greater commitment from senior executive leadership, extensive training for Project Managers, well documented processes for spacecraft development, improved project-line interaction, and extensive review and oversight of projects and subcontractors.

And, as a result, there was a happy ending: the correction actions taken resulted in a near flawless mission success for Mars Odyssey, arriving at Mars in October 2001.

Jerry Suitor is the manager of the Enterprise Process and Standards Program Office at the Jet Propulsion Laboratory. In this role he and his office are responsible for the management system at JPL including the implementation and maintenance of ISO 9001 certification. He was responsible for the coordination of the corrective actions resulting from the Mars Climate Orbiter and Mars Polar Lander failures.

Prior to this position, Dr. Suitor was active in technology development. His work included extraterrestrial resource utilization as applied to the production of propellants on the surface of Mars and advanced radioisotope power systems for spacecraft.

Dr. Suitor is a member of the American Society of Mechanical Engineers where he was a Distinguished Lecturer for four years. He holds a Ph.D. in mechanical engineering from the University of California at Santa Barbara.

Terry Senko, Experio Solutions

YOU NEED IT WHEN?

Facing Aggressive Deadlines

Despite your best efforts to work with your management and other stakeholders on a controlled project management process, you still end up inheriting a project that is partially defined (at best) that comes complete with a very aggressive “drop-dead” date. Although this is not the best situation to be facing, it is not uncommon. Here are a few approaches that might ease the pressure on the project manager and the project team.

Focus On The Business Need

Projects are conceived for a number of reasons; competitive needs, government regulation, strategic positioning and cost savings being among the most common. Often the required solution to address that business need is not very well thought-out, yet it appears to be a “preordained” set of requirements that the project manager must deliver. This assumption has doomed many projects before they ever got off the ground. The presentation of a project idea and the accompanying requirements should be taken as the starting point for business analysis.

Performing detailed business analysis is an effective way to “sift through” the differences between the business need and the assumed solution to that need. Often the solution to the “real business need” is only a subset of the requirements that are presented, or turns out to be a different approach altogether. In either case, the project manager can now address the core of the issue with a new project scope statement in the project charter. Presentation of the project charter and the results of the business analysis provide the project manager with an opportunity to layout logical arguments in support of reasonable solutions to meet the proposed deadline.

Utilize “As-Is” And “To-Be” Process Modeling

Despite a project manager’s best efforts in performing business analysis, scope may not yet be manageable within the specified time frame. The next logical step in a project that has significant business impact is to perform process modeling. Process modeling is a step that is often overlooked as being too time consuming; however it can actually expedite the implementation of a project solution. In addition, the deliverables produced by the modeling exercise can actually assist the project manager in defining reasonable scope, managing project deadlines and defining the priority of project deliverables (an item we will examine shortly) in support of business needs.

“As-is” process modeling analyzes and documents how business functions are being executed in the current business environment. This can be crucial for deriving project solution(s); it can be difficult if not impossible to install a new business function without a thorough understanding of the business functions and processes that exist today. The “as-is” model answers questions like “Will the new solution cover all the processes and functions that exist today?” and “Do we have any communication paths that can be enhanced with a new solution?” Many other questions can be addressed as well, such as process redundancies, points of automation and manual processing and “single points of failure” that can be improved. A good “as-is” model serves as a basis for, and greatly increases the efficiency of producing “to-be” models.

“To-be” process models can be the cornerstone of the detailed solution design utilized by the project team. Created in conjunction with knowledgeable stakeholders who will utilize the project solution in their everyday job, the to-be models can be used as the basis for end-user education, testing scripts and detailed deliverable completion checklists. Another significant benefit of the to-be model is end user “buy-in.” The creation of the process models inspires a sense of ownership for the end product within the customer community, which can be crucial in latter stages of the project.

So how does modeling help with tight deadlines? The process modeling exercise can derive alternate solutions that can be implemented quickly—these solutions can serve

to satisfy business requirements on an interim basis to ease overall deadlines. Alternatively, the new solutions that come from process modeling can become new permanent solutions that satisfy business needs, ease the pressure on the project manager and the team, and allow for other business improvements to be pursued.

Prioritize Project Solution Deliverables/ Dividing Scope

Process modeling can be the basis for determining where critical paths exist within the business processes being addressed by the project. Understanding the business process critical paths - something that many project managers fail to examine - can be the basis for trimming project scope to fit a prescribed deadline. These critical paths within the business process can take two forms - one critical path will provide the “shortest route” through the business process, which is pivotal to understand when process time reductions are desired. Secondly, critical paths can surface which demonstrate where the greatest impact to cost, customer satisfaction or other objectives are achieved. This can serve as a natural way to prioritize function, and divide project scope into phases, with some being produced before stated deadlines to meet critical business needs, and others to be produced on a more reasonable schedule after the initial deadline.

Even when business prioritization does not result in a trimming of project scope, the approach is helpful to the project manager. Producing and installing new business function in stages demonstrates a focus on the business, can result in the quickest approach to initiating benefit for the business, and can ultimately ease some pressure on a project team.

Approach Staffing Cautiously

The approaches we have discussed here to handling tight deadlines have focused on scope management rather than staffing. The temptation for many project managers is to focus on staffing first rather than scope as a means of handling a tight deadline leading to wasted time and resources. However, if the approaches outlined above do not end up creating a manageable situation, extra staff may be required to produce the solution within the required timeframe.



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VOLUNTEER APPRECIATION DAY ON THE GREENS

It was yet another occasion to recognize the hard work of the volunteers at the PMI Orange County Chapter. This year, the Volunteer Appreciation Day was celebrated at Irvine's "The Greens," an executive putting green, on Sunday, September 22, 2002. It was a hot Sunday afternoon when the hardworking crowd from PMI-OC chapter gathered for a round of golf. **Brent Felsted** had organized the festivities to the tee. Most of the volunteers, the board members, and their guests gathered to play golf and just have fun. Soon the languid afternoon came alive with the peels of laughter, shrieks of delight, and moans of exasperation, and that was *before* the golf "tournament" began.

Glen Fujimoto was seen to take photographs of anyone who would pose for them, but when he placed the camera in the able hands of **Diana Goltzer**, she demanded action from the players and got it. The rules of the "engagement" were recited to the volunteers by the establishment staff, and soon after the eager participants were off to their respective tees in the group of fours.

The golf course, we were told, was designed by the pros, and it was evident because putting on those greens was an exercise in humility. Maybe it was the effect of heat, but to me it was full of shifting holes, drifting sand traps, and constantly meandering water hazards. Nature could not stand still with all the commotion (and the flying balls) in the air. The birds, haunted by the balls, were darting from the bushes, while rabbits were scurrying to their holes to save their lives, and fishes were unsettled by the large white objects descending to the depth of their habitat. That, coupled with the eerie occurrences, added the excitement to the "tournament." Spookiness was evident everywhere. **Mike Beard** saw a bird push his ball in the water. On my part, I personally saw a rock move into the path of a ball that was headed straight for the hole. Some folks reported afterwards that out of nowhere they were pelted with crabapples. Luckily, everyone survived these "natural" and "supernatural" disasters.

The "tournament" came to an end with everyone finishing the eighteen holes, and it was time to declare the winners. The Greens' staff very patiently tallied the indecipherable information on our cards while everyone waited "anxiously" to see who would come out on top. The results made me understand the true meaning of the quote, "there are lies, damned lies, and then there are statistics." How else can I explain my tying score with golf veterans such as Brent and Glen (who, by the way, won the Individual Net Final Results)? One can only thank the weighted averages and the computerized handicap system for such happy coincidences.

Not all the results were such surprises. **Dave Jacob**, **Stephen June**, **Ray Stratton**, and **Cyndi Snyder** were the winners in "Best Team Performance" category and were presented with the Greens Caps. Cyndi chose well to be in the team with Dave, who was also the "Individual Gross Final Results" winner and received a polo shirt from The Greens. **Noi Beard**, who was my teammate, received a "Golf Cards" game for the best sportswoman of the (sand) lot.

Pradeep Chaphalkar, PMP



More photos of this fun day on the next page.

You Need It WHEN?

Continued from page 7

Project managers in this position need to be mindful of the emphasis this places on them to manage the production of solution deliverables, rather than participate in their production. Additional staffing requires additional coordination and communication, which needs to be handled by the project manager. Plans for the project manager's time needs to be allocated accordingly, with additional time reserved for when new staff or teams are added to the project schedule.

Care needs to be given when deriving the staffing schedule as well - team members need to be brought onto the project with sufficient time to "get up to speed," especially in technical areas. Bringing staff members into the project when things are already behind can actually **slow** the progress towards project solution delivery to the extent that later gains can be nullified. Bringing staff members into the planning process, and early in the development stage as needed yields the greatest benefit when facing aggressive deadlines.

Bob McGannon, PMP

*Bob McGannon is a Founder and Principal of **Mindavation**, a company providing project management training and consulting, leadership workshops and team building programs throughout North America. Bob can be reached at Mindavation via the web at www.mindavation.com or by calling 866-888-MIND (6463).*



News from Headquarters

Are you making the most of your PMI Member Benefits? If you're planning to attend PMI 2002 in San Antonio, Texas USA from 3-10 October, be sure to visit the PMI Pavilion in the exhibit hall of the Henry B. Gonzalez Convention Center to learn more about the many member benefits available to you as a PMI member. From professional certifications to e-learning and Seminars World® educational offerings, PMI adds value to your membership by offering a broad range of programs, products, and services that set a clear pathway for your professional development. Pavilion hours are Sunday, 6 October, from 5:30 to 8:00 p.m., and Monday and Tuesday, 7-8 October, from 9:30 a.m. to 4:00 p.m. Drop by, meet the PMI staff, and learn more about the many ways we can enhance your project management expertise. (conventions@pmi.org)

Aquent becomes newest partner on the PMI Corporate Council. We welcome them to our growing list of organizations. For the most up-to-date listing of Corporate Council participants, as well as links to their Web pages, please visit the Corporate Council Web page at www.pmi.org/corporatecouncil. (megan.mitchell@pmi.org)

Congratulations to the PMI Islamabad, Pakistan Chapter on recently receiving its charter! (marykate.webber@pmi.org)



September 22, 2002
Volunteer Appreciation Day on The Greens

WHY I VOLUNTEER

"I believe in PMI because I believe in project management; therefore, I volunteer." ASC Chair-Elect **Greg Stine, PMP**, talks to the SIG leadership about volunteerism.

Quite often I am asked, "Why do you throw so much time and energy into volunteering?" Certainly, with a 60-year-old house and twins on the way, I have more than enough to keep me busy these days. And then there is work. So why do I do it? This is an important question, one that all volunteer leaders should ask ourselves often, if, for no other reason than to ensure that we are still having fun. After thinking about this for a while, I have come up with the following reasons why I volunteer for PMI:

Professional Development

This is probably at the top of the list for most PMI leaders. If it were not for PMI activities, how many other project managers would you know outside of your own organization? Since changing jobs every six months to develop a professional network is not really feasible, involvement in the Institute provides a good alternative. Chatting with other project managers generically about the field constantly reinforces what we know, and exposes us to aspects of the discipline with which we may not be so familiar. Serving in PMI leadership roles enhances the experience even more, as we get to practice and hone leadership skills, something that may not get a whole lot of attention back on the job.

To Give Back

Chances are, if you are a leader in PMI, you are also involved in other activities in your community. Whether these are related to your kids' activities, the arts community, or civic activism, you are actively seeking to satisfy a basic human need: to feel like you are making a difference. I consider myself very fortunate to work in this field, primarily due to encouragement from others deeply involved in PMI. Volunteering is one way I can show my gratitude.

True Believer

Aren't project managers the most enthusiastic bunch of professionals you have ever seen? We are almost like a cult. Why is this? I would guess it is because most of us really, truly believe in the virtues of project management as a much better means for accomplishing goals than traditional methods. PMI is a vehicle for us to "get out the word" beyond our own ponds by pooling resources (sorry, no pun intended). As everyone knows, if your heart is in it, you are much more persuasive. I believe in PMI because I believe in project management; therefore, I volunteer.

To Have Fun

If you are like me, if it is not going to be fun, you do not want to do it. Luckily for PMI, I have fun volunteering. I mean, who can forget a room of 200 people hollering "NEW YORK CITY?" every time Frank Saladis came up to the podium in Long Beach in 1998? What about the first time we tried to use Robert's Rules in an ASC business meeting? PMI has brought forth many opportunities for a good belly laugh, and I am sure there are many more to come.

Selfish Ambition

Hey, face it, no matter what you are involved in, there is always some aspect of "WIIFM," What's In It For Me. Not to be too hard on ourselves, but many of us are involved with PMI because it is the best thing going on in project management. Whether that means getting face time with potential new clients, finding new job opportunities, or traveling to wild, exotic places (Birmingham, AL USA anyone?), there are personal rewards for getting involved. For myself, jumping in and volunteering for PMI has allowed me to network with many of the top leaders and executives in our profession. These folks are always there to provide advice or wisdom whenever I need it. Believe me, I make the most of that \$119 (US)!

I could probably come up with another ten reasons why I volunteer for PMI, but that would not be fun and you would not read it anyway. The point is, the events of the past year have forced us to look inward and reevaluate a lot of things about ourselves: how we spend our time, and what has "meaning" in our lives. I am sure most of us have done so in recent months. Perhaps, in doing so, you have realized that your priorities or motivators have changed and PMI is not as high a priority as it once was. While this is not necessarily a negative notion, this has implications on how well you are able to serve your customers - our customers - PMI members. So ask yourself: Why do you volunteer?

Greg Stine

Assembly of SIG Chairs, Chair Elect

Let us know why you volunteer. Send your reasons to Kristine Hayes Munson (kristine_munson@hotmail.com) for inclusion in an upcoming issue of Milestones.

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Patricia McNabb, PMP



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Try Your Knowledge on PMP Exam Questions

(Answers are on page 17)

Here is a sample of some questions:

1. A standard is:
 - a. Approved by a recognized body for which compliance is mandatory.
 - b. Approved by a government agency with mandatory compliance.
 - c. Approved by a recognized body with voluntary compliance.
 - d. The same as a regulation.
2. A risk symptom is:
 - a. An trigger.
 - b. An unidentified risk.
 - c. A source of risk.
 - d. A potential risk event.
3. Of the following executing processes, which one is a core process?
 - a. Contract administration.
 - b. Quality Assurance.
 - c. Project plan execution.
 - d. Team development.
4. The purpose of a cost change control system is to:
 - a. Define procedures by which the cost management plan is changed.
 - b. Define procedures by which the cost baseline is changed.
 - c. Detect variances which will require a cost change.
 - d. Establish an information system to monitor cost performance.

PMI-ISSIG PRESENTS Adventures in Project Management



The Project Management Institute's Information Systems Specific Interest Group (PMI-ISSIG) held its 6th annual Professional Development Symposium from July 28th through July 30th, 2002 at the beautiful Hilton Walt Disney World Resort, Lake Buena Vista, FL. Noted speakers (e.g. de Jager, Russell, Dekker, Kapur, Knutson, Lentz and many others) provided cutting edge techniques for managing IS projects, and exhibitors showed the latest tools and innovations supporting project management. The event was rated an outstanding professional success by the attendees, and, surprisingly in today's economic climate, was even a financial success for the ISSIG in that it ended up slightly in the black. So, how does an event like PDS '02 come about?

I became involved with PDS during PDS West '01, which was held in Newport Beach last year. PMI-OC provided the volunteers to support the symposium, and I served as the Director of Volunteers. In this capacity I interacted considerably with the PDS organizing committee. I enjoyed the experience so much that I expressed an interest in becoming involved with PDS '02, and a few months later found myself a member of the organizing committee for it.

The organizing committee was a virtual organization of a dozen people spread over the USA and Canada. We met once a month on a teleconference to report progress on our assigned tasks and to discuss problems and ideas. Many of us actually met for the first time in Orlando. As with any project, the PDS was decomposed into different areas of responsibility - Operations, Sessions, Logistics, Marketing, Sponsors, etc., and people volunteered for the tasks in which they had the greatest interest and which they could accomplish from their location. Some tasks, such as making the site arrangements, required a certain proximity to Orlando, while other tasks were handled by telephone and e-mail. Joe Kralovec, the PM, established a series of critical milestones, and a project schedule was created and monitored during each telecon. With an event like PDS, a series of go/no go decisions must be made as you measure the projected registrations against the committed costs. My own task was making arrangements for the sale of books written by the presenters, and the conducting of a raffle at PDS '02, which gave away books, etc. donated by the presenters.

PDS'02 ran Sunday evening through Tuesday afternoon. It had registration and a welcoming reception on Sunday, with presentations Monday and Tuesday, and a dinner and Disney speaker Monday night. However, for several of us on the committee, it actually started on the Friday before when we met with the hotel staff to finalize arrangements and with the local committee members and volunteer leaders to ensure that nothing had been overlooked. The event was enjoyed by all, and the evaluation forms from the attendees showed that they considered it well worth the cost of attending. For me, events like PDS '02 are why PMI exists and why I belong to it. Attending a PDS exposes one to the latest ideas and developments, and is a marvelous networking opportunity in an interesting and enjoyable location. Many attendees brought their families to Orlando and tied attending the PDS into a family vacation. However, volunteering to be on the organizing committee adds an extra dimension to the experience, and you get to attend the PDS for free (that is when you are not working, like selling books).

The PDS '03 committee is already at work, so reserve some of that training budget and plan to be in **San Antonio, TX from 15 to 17 June 2003.**

Terry Warner, PMP



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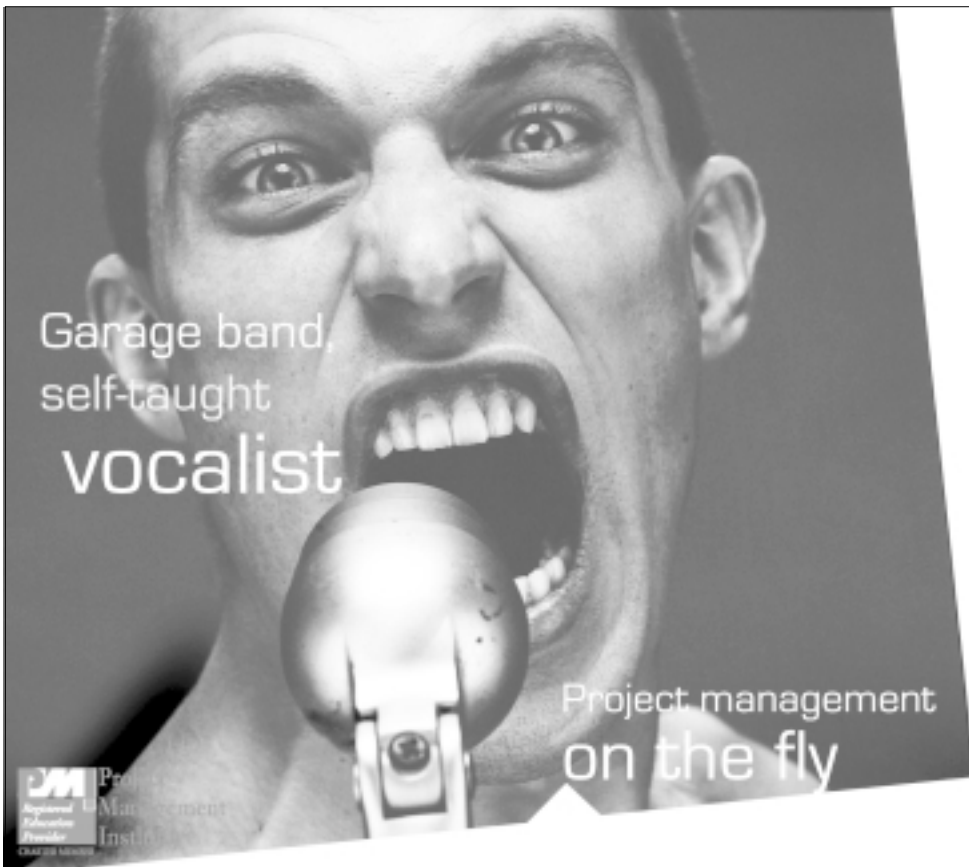


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SoCAL RISK SYMPOSIUM SUCCESSFUL BEYOND EXPECTATIONS

The SoCal Risk Symposium, which was held from September 12-14 in Long Beach, was successful beyond expectations. The Mayor of Long Beach opened the symposium. From the opening presentation by **Dr. Bob Charette**, who was dressed in garb as the High Priest of the New Religion of Risk to the final speakers, attendees were impressed by the quality of the speakers' presentations. Dr. Charette's presentation was a play on a religious revival to emphasize how the ability to manage risk has changed society.

Many attendees told this writer that the symposium not only exceeded their expectation, it was the best project management symposium that they had ever attended. The level of the papers exceeded those that are offered at the PMI International Symposia. People were excited to have the opportunity to mingle with a virtual who's who of project risk management. Attendees came from all parts of the United States, Europe, and North America.

The first day ended with a plenary session given by the internationally renowned **Dr. Barry Boehm** from the University of Southern California. Dr. Boehm, a prolific author, is considered to be the father of Software Risk Management, the spiral model, COCOMO estimating model, and other commonly used software engineering tools and techniques.

The second day opened with **Dr. Brian Hagen's** presentation "A Corporate Tool Kit for Decision and Risk Analysis." Dr. Hagen offered excellent insight into what types of value senior executives expect from project management and risk management. He offered that no organization practices comprehensive enterprise level risk management. He demonstrated how portfolio tools, real options, and strategic gaming can be applied to determine which risks should be accepted and which should be managed.

A total of eighteen speakers offered insightful presentations across three technical tracks. Each track offered six presentations over the two days. Three general sessions were offered

for all attendees. Eleven of the speakers came from out of town including **Dr. Alexandre Rodrigues** from Portugal.

The symposium was a joint venture among the PMI Risk SIG and the Los Angeles, Orange County, and San Diego PMI Chapters. The entire symposium was organized and managed by volunteers from all partner components. Although none of the team leaders had ever worked together, and none had organized a symposium, they were able to make the project work to deliver a quality product in time and on budget. As project manager, I have only superlatives to express gratitude and thanks to the volunteers whose hard work and selfless dedication made the symposium appear to many attendees to have been run by professional meeting planners.

*Mike Wakshull, PMP
PMI-LA*

MEMBERSHIP AND PMP TRENDS



PMO 101

What You Always Wanted to Know About a PMO But Were Afraid to Ask

Part Two

In this article we will look at the initial development of a PMO to ensure the first step in the development is not off the cliff.

One of the most critical steps in the development of a program or project management office is to start off with strong, tenacious executive level support. Anything less and you are only kidding yourself because the development of a PMO is a drastic change even with a well-defined and acknowledged culture. You need a sponsor who will lead change at the executive level, work the politics at the top, and prevent the politics from negatively affecting the working level.

The next step is to find an experienced Project Management Professional (PMP) who has more than five years of managing very large complex projects with a positive track record and has managed a functional department of people for several years. They also need experience in finance, contracts, business management, marketing, and be a people person. They need to be the **Master Coach**, a hands on leader who is willing to roll up their sleeves and pitch in to help the team and be accountable with them. Some technical (any technical field, not just computers) skills would not hurt, but personally I feel this is not a hard fast requirement. They must also be able to see the forest as well as the trees and the weeds.

An assessment of the organization is required to understand the true level of project management knowledge. A good assessment tool may be found in *Strategic Planning for Project Management Using a Project Management Maturity Model*, Harold Kerzner, PhD., 2001, John Wiley & Sons, ISBN 0-471-40039-4. Dr. Kerzner identifies five levels of project management maturity in his book that are somewhat similar to the Software Engineering Institute (SEI) Capability Maturity Model (CMM) levels. At the end of each maturity level chapter, Dr. Kerzner provides an assessment that may be given to determine if a reasonable level of project management knowledge exists in the organization. Also included is an interpretation of the results to determine upward movement or retention in the maturity process. The assessment may also be administered to potential program or project managers to fill positions in the PMO.

Once the assessment is complete, it is time to start developing a master plan that would encompass an acknowledgment of the existence or lack of a corporate culture, where in the organizational structure the program or project management office will reside, a project management training plan for the **entire** organization, a structured hiring plan, identification of initial metrics, and a plan for the development of policies and procedures.

I have not mentioned software tools or methodologies in the initial plan because they have a tendency to steer the focus away from the development of PMO Best Practices. Best Practices will weather any storm. For a start-up PMO, software tools and methodologies induce complications, take an enormous amount of money out of a PMO's budget, induce integration headaches, and require resources that take away from real project management time and training. Software tools and methodologies are not the silver bullet for a PMO. People do the work, and develop and instill Best Practices, not software tools or methodologies. I like the nice tools just as much as anyone else, but my choice is later in the development timeline and maturity curve, not when initially attempting to induce positive change.

OK. What's next in the PMO 101 syllabus? Tell me what subject area you would like to see touched on in a PMO. Send me an email with your suggestions and I will make it the next topic.

Mike Beard, PMP, P4 Project Management Corporation
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Answers to PMP Exam Questions

From page 14

1. c. **Approved by a recognized body with voluntary compliance.**
The Project Management Context
PMBOK Guide 2000, paragraph 2.5.1
[Planning] paragraph 8.1.1.4.
2. a. **A trigger.**
Risk identification output
[Planning] *PMBOK Guide 2000*,
paragraph 11.2.3.
3. c. **Project plan execution.**
All others are facilitation processes.
[Executing] *PMBOK Guide 2000*,
paragraph 3.3.3, figure 3-6.
4. b. **Define procedures by which the cost baseline is changed.**
Project Plan Execution [Controlling]
PMBOK Guide 2000, paragraph 7.4.2.1.



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Total New Members: 47
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Share available employment opportunities with PMI-OC dinner meeting attendees. Submit your opening to Theresa Theiler, tt1591@sbc.com.

DINNER MEETING

TUESDAY, OCTOBER 15, 2002

Program: **Global Leadership for Project Managers**
 Location: Wyndham Gardens Hotel
 3350 Avenue of the Arts, Costa Mesa
Behind the O. C. Performing Arts Center
 Time: 5:30 - 9:00 p.m.
 Cost: In Advance: At the Door:
 Members \$30.00 Members \$45.00
 Non-Members \$35.00 Non-Members \$45.00

Please register at www.pmi-oc.org. You can pay via credit card in advance or by cash/check at the door.

Make your reservation by 5:00 pm, Thursday, October 10th, to obtain the "In Advance" price. Reservations made after 5:00 pm, Thursday, October 10th, will be charged the "At the Door" price.

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Members and non-members who cancel after Sunday, October 13 at 6 p.m. will be invoiced a \$15 cancellation fee. Members and non-members who make reservations and do not show up at the meeting will be invoiced a \$15 no show fee.

PMI-OC BREAKFAST ROUNDTABLE

TUESDAY, OCTOBER 22, 2002

Join us for breakfast on the fourth Tuesday morning of every month to discuss project management issues that impact you.

Location: **Hilton Hotel**
 (formerly The Red Lion)
 3050 Bristol Street (near Paularino)
 Costa Mesa
 Atrium Cafe, lobby level

Time: 7:15-8.45 a.m.

Cost: Self-paid breakfast
 Parking is validated

Register: e-mail Tom Sippl:
tsippl@pacificlife.com

PMI-OC WEB SITE

Visit our web site at:
<http://www.pmi-oc.org>
 to make your reservation for the dinner meeting and to stay informed of events that are important to members and to project management.

E-MAIL

If you would like to receive e-mail announcements about upcoming PMI-OC events, contact Rstein@PTSStaffing.com.

PMI Orange County MILESTONES

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COMING EVENTS

OCTOBER 15 DINNER MEETING

PLEASE NOTE DATE CHANGE

Global Leadership for Project Managers
Charles Bergman, Meridian Resources Associates
Vendor Showcase: Meridian Resources
See page 1

OCTOBER 22 BREAKFAST ROUNDTABLE

See page 4

OCTOBER 28 PMI-OC BOARD MEETING

E-mail info@pmi-oc.org for details

NOVEMBER 12 DINNER MEETING

PMO Panel Discussion
Vendor Showcase: Irvine Technology Corporation



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