APRIL 8TH PMI-OC DINNER MEETING

Program Management Lessons Learned in Howard Hughes' Hobby Shop:
How, against all odds, the Apache Helicopter emerged.

By S. Garfein

Before the Internet, before the personal computer, and before project management software, how did one of today's of most effective weapon systems emerge from an environment where the only computer was an IBM 360 mainframe? What lessons can we learn from the best practices developed in the "Hobby Shop?"

The Hughes Helicopter Company (the Hobby Shop) System Program Office was an important factor in winning the Advanced Attach Helicopter (AAH) competitive fly off against the Bell Helicopter Company. The AAH, now known as the Apache, is one of the Army's most successful programs. It was deployed in the 1st Gulf War, Afghanistan, and by the time this presentation will be given in April 2003, it may have seen action yet again. A number of innovative management techniques were pioneered on the Apache, including: 1) Establishing a trusted Strategic Program Office (SPO), 2) turning enterprise weaknesses into strengths, 3) establishing weekly performance meetings NOT co-mingled with technical reviews, 4) creating a technical oversight capability in the SPO, 5) minimizing program surprises, 6) propagating Octographs, and 7) achieving real-time coordination with major subcontract team members.

Steve Garfein has worked in the frontlines of project management for over thirty-five years beginning at the Hughes Helicopter Company on the Apache helicopter program and then as the founder and president of RPM Systems Corporation. Steve was a member of the Hughes Helicopter management team that developed the Apache helicopter. One of his responsibilities was the implementation of a company-wide, strategic PMO. He led the Hughes effort to validate its cost/schedule control system with the DoD. He founded RPM Systems Corporation in 1979. RPM has been a leader in strategic applications of Enterprise Portfolio Management systems. In May 1988, Steve began consulting for Microsoft and worked on the development of what became Microsoft Project for Windows 1.0, which was released in May of 1990. He holds degrees in business from UCLA (BS) and USC (EMBA) and has lectured at Oxford University's Templeton College, and the Stanford University Graduate School of Engineering.

Vendor Showcase: University of Wisconsin

THE PRESIDENT'S COLUMN

Where is PMI Headed?

At the PMI Leadership meeting in Tampa last month, the PMI Board of Directors unveiled the results of their strategic planning process and facilitated discussion around what components (Chapters and Specific Interest Groups) can do to align with the strategic direction.

To give you some background on the strategic planning process PMI followed, we'll review the key elements used in development of the strategic plan. The PMI Board of Directors began by defining PMI's *Core Purpose* (the organizations reason for being) and *Core Values* (essential and enduring principles that guide an organization). The Purpose and Values serve as filters through which all planning decisions must pass.

PMI Core Purpose: *Advance the practice, science and profession of project management.*
PMI Core Values: *Professionalism, Knowledge, Community & Volunteerism, Value of Project Management to Business*

At the leadership meeting, PMI discussed three planning horizons: 10 – 30 years, 5–– 10 years and 3 – 5 years. I'll highlight the key points of each planning horizon.

10 – 30 years – Envisioned Horizon

PMI summarized this future horizon in one envisioned goal:

Worldwide, organizations will embrace, value, and utilize project management and attribute their success to it

5 – 10 years – Strategic Horizon

Three elements were used to guide planning around the strategic horizon: Mega Issues, Assumptions and Strategic Principles. I'll discuss the Mega Issues here as they directly tie to the Strategic Planning horizon discussed below. The Board identified six types of Mega Issues. These mega issue types are of strategic importance and form the basis for dialogue about choices facing the organization. Mega issue types identified include:

Profession, Image & Brand, Networking and Community, Professional Development, Knowledge and Advocacy.

3 – 5 years– Strategic Planning

At three to five years out, the Board established one goal and several objectives within each Mega Issue type identified on the Strategic Horizon. At the Leadership meeting, we broke into groups to review each set of goals and objectives and think about what we would do at the chapter level to align. This discussion proved very enlightening as we learned where different chapters were at in their stage of development and what they would propose to do to align.

President's Column

Image & Brand: *Professionals and organizations associated with PMI will be recognized worldwide for consistent delivery of project management excellence and success.*

Networking & Community: *Individuals and organizations will benefit from PMI's efforts to facilitate and promote community among those who practice project management*

Professional Development: *Practitioners and organizations which have participated in PMI professional development activities will be preferentially valued by organizations that seek project management expertise*

Knowledge: *PMI will be the world's premier source and resource of project management-oriented knowledge and expertise*

Advocacy: *Through the advocacy of the Institute, leaders and decision makers in all sectors will integrate project management in order to achieve organizational results*

This is just the beginning. PMI continues to refine and implement the Strategic Plan. PMI plans to incorporate both Member and Component feedback on strategic issues facing the Institute. As a chapter, we will use this tool as one of the inputs into our own strategic planning process that we will begin late this summer.

I am encouraged to see the caliber of leadership being provided to the Components by PMI. The outcome of this meeting was extremely positive. I am encouraged as PMI continues to step up to support its components by providing strategic direction and increased tactical support.

On a side note, our own Past President, Cyndi Snyder, led the Strategic Planning break out exercises as part of her new role as Chair-Elect of the Chapter Leadership Development and Excellence Committee. Great job, Cyndi!

Adrienne Keane, PMP

MEMBERSHIP AND
PMP TRENDS

One Year Moving Membership Trends

One Year Moving PMP Trends
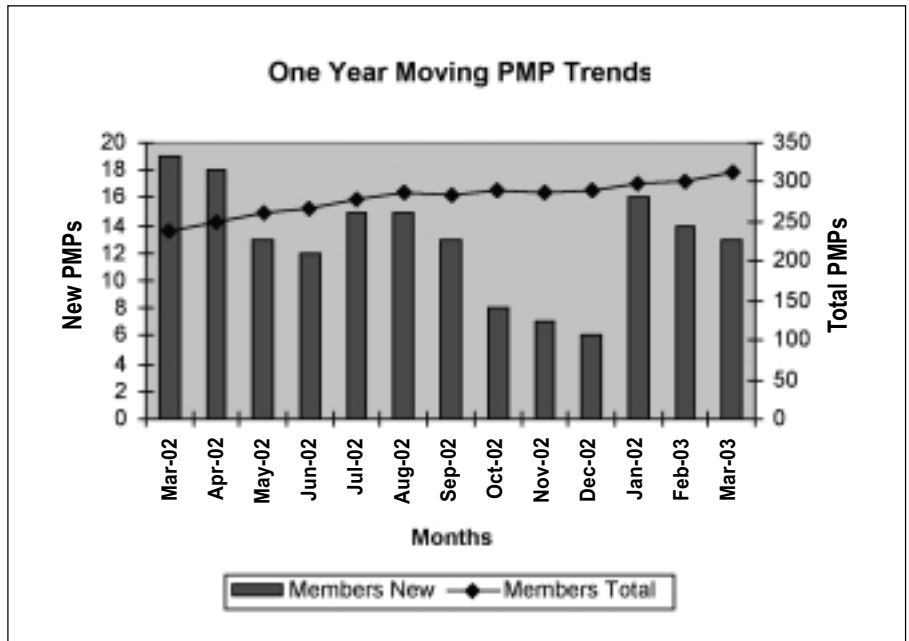
VOLUNTEER OF THE MONTH

Ed Fern Honored as Volunteer of the Month

A resolution was unanimously passed, at the January Board meeting of your Chapter, designating **Ed Fern** as the **Volunteer of the Month for March**. Chapter Volunteer Coordinator, **J. C. Moreno,** honored Ed at our March 2003 general meeting, by presenting him with a Certificate of Appreciation.

Ed joined PMI-OC in January of 1998 but "secretly" admitted, that he did not attend his first meeting until the next month. He vividly remembers the day he became a PMP. It was October 9, 1998 at 10:34 AM in Diamond Bar, California, just two days before the Fall 1998 ACP meeting in Long Beach, which he attended.

Ed jumped in with both feet as a volunteer for our chapter. In the following year he was elected to the chapter's Board of Directors as VP Communications. He continued to stay on the Board in several positions over the next three years as VP Membership in 2000, and VP Professional Development in 2001 and 2002. While effectively performing his duties on the Board, he extended his volunteer "horizons" to include a host of other endeavors. As a way of spreading his passion for project management and PMI, Ed played an extremely pivotal role as sponsor of the newly formed California Inland Empire chapter. During his attendance at the 1998 PMI Symposium, he met and developed a close professional relationship with Vladimir Liberzon, a member of the Moscow chapter of PMI. With this relationship Ed seized the opportunity to be a successful and well-received presenter on two separate occasions at the Moscow chapter. Because of this success, Ed will be returning to Moscow in June - for the third time. Regarding presentations, there's more- Ed has been a much sought-after and highly regarded presenter at our chapter, San Diego (twice), Los Angeles, Silicon Valley, San Francisco (twice) and Las Vegas. This coming May he will be "encoring" as a presenter at our chapter for the second time.

But it's not just his presentations that make Ed such an impressive and appreciated volunteer. In conjunction with the ACP meeting hosted by PMI-OC in Costa Mesa in March of 2002, Ed on his own initiative organized and implemented a one-day seminar *"PM Around the World".* This was truly a capstone event and, by any standards, an unqualified success. (The proceedings are documented in the April 2002 issue of Milestones. *Go to http://www.pmi-oc.org/ms_archives.asp and download this issue. It makes for great reading!)*

Almost immediately upon receiving his PMP, Ed volunteered as instructor/facilitator for several PMP Workshops. To his credit he has done eight workshops in Orange County, three in Los Angeles, and one in San Diego. In parallel with this effort he took on the daunting job as co-creator (with past president **Cyndi Snyder**) of the chapter's current PMP Workshop presentation materials. He also developed a shorter version for UCI.

Catching up with Ed's busy schedule, we found him working on his second book in conjunction with four other authors, including **Bill Postma**, PMP (member of PMI-OC,) **Kevin McGourty**, **Norman Wolfe**, (both of whom are New Product Development Professionals or NPDP), and **Vladimir Liberzon**, PMP, Ed's Moscow associate. Its title, *"Six Steps To The Future: How Mass Customization Is Changing Our World"*, will surely be as well received as was his previous book. Additionally, he is conducting project management training sessions for clients in Southern California and preparing to spend six weeks in Ukraine and Russia where he will present a paper about Mass Customization at the global congress of the International Project Management Association (IPMA).

(Go to: http://www.pmcongress.ru/).

His future aspirations involve teaching project management in China and other emerging capitalist societies. Ed genuinely feels that the professional and social significance of project management principles brings economic competitiveness to any culture, which "is healthier than military competition because it enriches everyone."

On asking Ed for a quotable statement on what he likes about volunteering for PMI-OC, he said, *"The chapter has given me so many opportunities to do interesting and fun things that have made my life richer. This award seems like frosting on a cake that's probably not on my diet. But don't tell my doctor or my wife."*

Dave Jacob

LOCAL CHAPTER COMPLETES ANOTHER
SUCCESSFUL PMP PREP-COURSE

March was another milestone for the chapter, completing yet another successful PMP® Preparation Workshop. The workshop provided 35 PMP candidates with the necessary contact hours to meet the PMP test requirements and a comprehensive review of the PMP test material. One student took and passed the PMP exam prior to completing the last class.
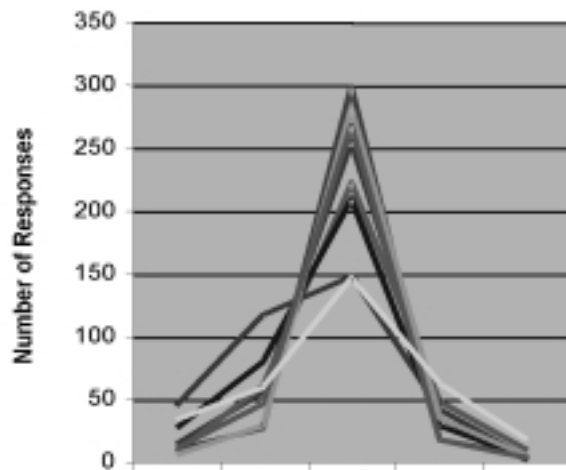
Student Evaluations

Below is a summary of the Student Evaluation forms. This sends us two clear messages. The first is that the vast majority of comments indicated that the workshop meets student expectations. The other message is that we can improve aspects of this course to make it even better for the next session.

Winter 2003 All Responses

	1	2	3	4	5
1. Material Breadth (1– Much broader)	15	57	255	36	2
2. Material Depth (1– more depth)	8	61	223	49	10
3. Material Usefulness (1– most useful)	45	118	149	42	4
4. Teaching Technique (1– Monotonous)	9	28	296	17	5
5. Teaching Technique (1– helpful)	27	80	209	29	4
6. Class Length (1– ext. helpful)	6	29	262	36	5
7. Class Speed (1– Slow)	11	46	268	17	3
8. Student activities (1– useful)	34	60	147	63	17

Kudos go out to **Ed Walker** who acted as the PMP PREP class Project Manager and Student Coordinator **Ken McAfee** for the outstanding jobs that they did on this class. Training material donated by Time-To-Profit. The following PMI-OC members donated their time to facilitate portions of the workshop:

- Ed Walker
- Frank Reynolds
- Phil Quigley
- Suresh Guttikonda
- Gene Dutz
- Diane Altwies
- Tom Jowdy
- Graham Kneale
- Ed Fern
- George Meier
- Pradeep Chaphalkar
- Margaret Cunningham

Future Plans: Certification Program Committee

A "lessons learned" meeting was held on March 15, 2003 and hosted at OuterCore in Newport Beach. VP Professional Development Kristine Munson led a brainstorming session that yielded over 50 ideas on things to improve. The PMI-OC Certification Program Committee was formed with **Mike Graupner** and Ken McAfee co-chairing. The committee's charter is found on page 22.

Four sub-committees were formed and initial staffing occurred. Ed Walker agreed to head the Instructor Sub-committee. **Tom Cumming** volunteered to lead the Curriculum Sub-committee. We also created a Scheduling Sub-committee and a Quality Sub-committee. Both are in need of both leaders and helpers. None of the committees require a PMP certification to participate.

If you would like to participate, please contact **Kristine Munson** (kristine_munson@hotmail.com), Ken

Mike Graupner
Co-Chair, Certification Preparation Program Committee

BITTERSWEET NEWS

Judy Quenzer and Mike Beard Resign

I am saddened to inform you that two PMI-OC Board members resigned last month.

Judy Quenzer, VP Membership and former VP Programs resigned her post in March to devote more time to her family. Judy has been an active member of the Board for the last three years. She has been instrumental in developing the exceptional dinner and breakfast programs we hold each month. Her dedication and spirit have been an inspiration to all.

Mike Beard, VP Operations and former VP Professional Development also resigned his post to focus his attentions on his new company. Mike has made significant contributions to the chapter during his two-year tenure on the Board. For the last four months of 2002 he actually held both of his Board posts at the same time. His dedication and focus on details that many of us overlook will be missed.

I wish both Mike and Judy well in their new endeavors. They will both be missed. Thank you for all your hard work and dedication to PMI.

Adrienne Keane, PMP

Dear PMI Friends:

I joined PMI in 1999 and attended the chapter meetings at the Holiday Inn in Santa Ana. My goal was to make a difference in our chapter. When Keith Reynolds resigned in January 2000 due to job relocation to the east coast, I took over as VP Programs and served in this position for 3 years. I have enjoyed working with our leadership team on the PMI-OC Board of Directors, and serving our members and guests. It has been a great experience for me and I have learned so much from everyone. I sincerely appreciate the friendship, camaraderie and support I have been given over the years.

As some of you may know, our 23 year old son was in a car accident in November 2001. Due to his injuries, he is a quadriplegic. At this time in our lives, my husband and I want to spend more time making a difference by helping our son and other people with similar disabilities. I need to spend my time and energy on our new goal. Therefore, I am resigning as VP Membership at PMI-OC.

The Board of Directors and team of volunteers have put a great deal of time and effort into making PMI-OC an organization we can be proud of. Our chapter has always been considered a model for other chapters to aspire to. The continued dedication of the Board of Directors, volunteers and members will continue our tradition as one of the great PMI chapters.

I look forward to seeing you at PMI-OC monthly chapter meetings and events to continue to network, share, learn and grow together.

Judy Quenzer, PMP

Fellow PMI Members,

After some heavy deliberation and with much regret I must tender my resignation from the Board of Directors of PMI-OC. This was not an easy decision for me to come to but it is necessary based on two reasons— limited time and the perception of a potential conflict of interest.

For the past few months I have been focused on the development of another company as a full partner. It is rewarding but has left me with less time to focus on PMI-OC board subjects and issues requiring attention. As such, it my duty to the membership and the board to relinquish my position as VP Operations to ensure that someone with the necessary time available may attend to these matters.

Also, I have been engaged in developing products that have potential market possibilities at the PMI chapter level. I feel these potential engagements could exhibit a conflict of interest based on my board position at PMI-OC. Thus, my ethical concerns dictate that I remove the perception of any conflict of interest for myself and PMI-OC by resigning.

This has not been an easy decision as my heart is in the Chapter and its dynamic growth and position. It has been a privilege to work with many exceptional people at the Chapter and I look forward to maintaining these relationships at the monthly dinner and breakfast meetings.

Although I cannot afford to devote myself, as I have in the past, I will assist on an ad hoc basis from time to time.

I wish you and the PMI-OC Board great success with the development of the chapter for the members.

Mike Beard, PMP

If you are interested in contributing and being a part of an award winning organization, we would love to talk to you. All you need is a little time and a lot of desire to make a difference. Anyone interested in volunteering as a PMI-OC board member should contact Adrienne Keane at president@pmi.org.

Now you see the Stars and Stripes, now you see the flowers

Imagine that you are the driver inside a float at the annual Rose Parade. For two and half hours you cannot see where you are going. Your only contact is with the observer on the outside who gives you directions via intercom. Outside, a huge American eagle is flapping its wings over the Stars and Strips draped before it (Figure 1). A natural material, as required by the Parade rules, covers every surface: red and white carnations for the stripes, blue statice, and white coconut for the stars. Brown flax seed, palm fiber, and magnolia leaves cover the eagle's wings, white lanaria petals the talons and claws, with pine cone chips around the ankles. The eagle's orange beak is clad in Turkish lentil seed.

Figure 1: Tim Estes uses thumbnail sketches such as this American eagle to obtain approval for his designs.

As you approach the I-210 freeway underpass, you need to stop, because the eagle is too tall and wide to fit through the opening. An ingenious mechanism allows folding down and collapsing head and wings. The float's crew can do this procedure in less than sixty seconds. On the other side of the freeway, the reverse procedure takes place, also in less than a minute, and the parade continues. You are being watched by a million people who line the streets along the parade in Pasadena, and by an international TV audience: 125 million in the US, and 225 million in 95 countries, even in China and Russia.

With his involved-in-every-detail account, **Tim Estes** afforded his audience an insider's look at the Rose Bowl parade. His company *Fiesta Parade Floats* designs, builds, and operates 13 to 14 floats for this event every year. It also builds floats for parades elsewhere in the US, among others in Hawaii, Oregon, Arizona, Texas, and Illinois.

The floats for the Rose Parade consume a total of 200,000 lbs of steel, of which 85 percent is recycled in the floats of the next year. Fiesta builds its own chassis, which last about seven years; Chevrolet engines and transmissions with special 118:1 reduction gear for a cruising speed of 2.5 miles/hour power them.

Each float requires 120 gallons of glue for mounting all the decorations onto the steel understructure. Because only natural materials must cover all visible surfaces, no paint or synthetic substance is used. Flowers comprise the bulk: mums, orchids, daisies, carnations, and of course roses, 400,000 of them, half with a four-inch, and half with a five-inch stem.

The roses require special handling. Upon arrival, they are inspected for either tight buds or buds already opening, because that determines their use on the float. To extend freshness, the stems must be cut under water to prevent air bubbles from entering. Each rose goes into a vial that underwent cleaning with bleach and received a Styrofoam pad at the bottom and a rubber plug at the top—all done by volunteers' hand.

Tim has been passionately building floats for over 15 years. From his father, who built spacecraft at JPL, he inherited the fascination for creating things. He maintains a year-round crew of 30, which at decorating time in December he augments with volunteers. He also hires a trusted group of "float supervisors" to "micromanage" the volunteers. It takes an average of 7,200 person-hours to decorate a float. Members of high-school clubs and girl scouts donate their time to earn money for their organizations and decorate two thirds of the floats. For the other floats, the sponsors supply their own decorators, for whom decorating their company's float is a welcome change from their daily work routine.

A float has its own life, so-to-speak. It all starts when the Rose Parade management announces the theme for the next parade—the one for the 2004 parade is "Music! Music! Music!" Within a few hours after the Rose Parade is over, most of the flowers will have wilted and the floats' life ends, only to start up again three weeks later.

Figure 2 (on page 8) shows the cycle that Tim follows for building his Rose Parade floats. You might have guessed: the riskiest items of a float are the flowers. Some have long lead times; others may suddenly become scarce due to changes in the growing conditions. Tim uses three brokers who source their flowers internationally. As they remain fresh but for a few days, the flowers arrive just in time for use in the decorations. Some are local; some come from overseas.
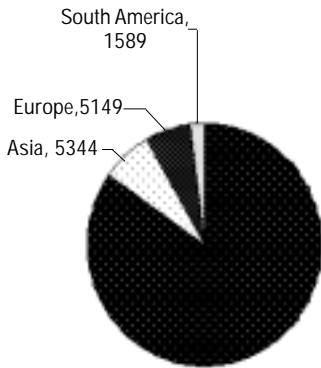
March Meeting Review

Tim has won many awards with his floats. Over the past 13 years, his floats have had the highest prize-winning rate. Every year during the past ten years, one of his floats has fetched the Rose Bowl's top prize, the Sweepstakes Award.

How does he do it? Tim does not use WBSs, network diagrams, or Gantt charts. Rather, he explains "I keep very good notes, I am always on top of what's going on in the shop, and I communicate constantly with my people." Obviously, Tim builds floats because that is what he loves to do more than anything else. "It's not a business for getting rich," he comments modestly. (His floats sell between $190k and $275k.)

Rather than worrying about winning prizes, Tim needs to be happy with his floats and wants to be sure that his clients are, too. At least once every two weeks he sends them emails with digital photographs of the floats' progress. He attributes his success to (a) his dedicated people, most of whom have been with him for many years, and (b) to these three principles:

1. Pay attention to detail and meet the clients' needs regardless of hiccups;
2. Work with crew and volunteers as a team—if necessary sweep floors;
3. Keep the promises made to team members, purveyors, and clients.

Tim believes that it is chiefly because of this last point that his company's floats win prizes year after year. Of course, Tim could apply to his business some of the principles of project management. He could for instance employ the basic tenets of scope, schedule, and cost control. Doing so would likely bring him benefits he never dreamed of reaping. Imagine that!

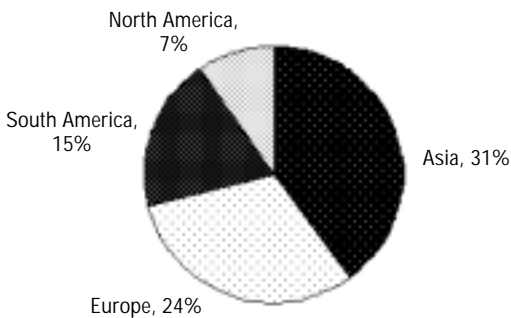*George D. Meier, PMP*

MARCH QUICK FACTS

Facts from PMI's Data Archive

In 2002, the various chapters of PMI showed a respectable growth in membership. As you might expect, the US, Canada and Mexico dominate the membership. The growth, however, of this region was a rather modest 7 percent. The real growth in chapter membership has moved overseas: Asia and Europe dominate with 31 and 24 percent. Have a look at the two graphs:

2002: North America Dominates Chapter Membership
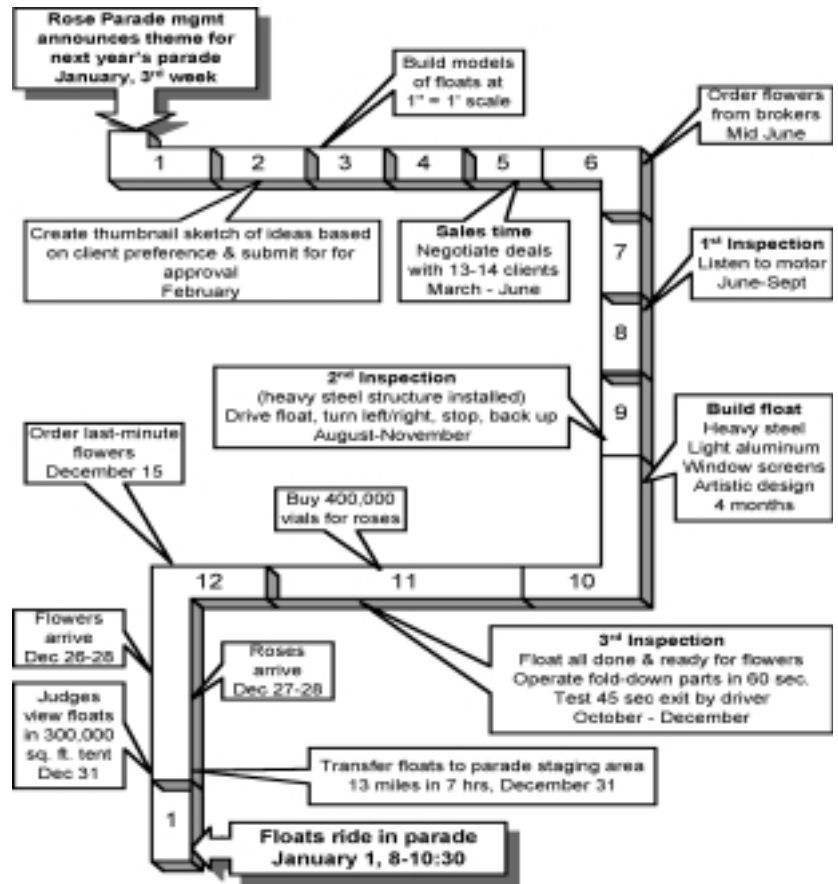

2002: Asia & Europe Dominate Chapter Growth

Compiled by
George D. Meier, PMP

Here is a sample of some questions:

1. An input for developing the project charter is:
   a. Constraints
   b. Assumptions
   c. Strategic plan
   d. Work Breakdown Structure (WBS)

2. The difference between the project plan and the performance measurement baseline is:
   a. The project plan changes only intermittently in response to approved scope changes.
   b. The performance measurement baseline changes each time a cost, schedule or technical variance occurs which needs correction.
   c. The performance measurement baseline changes only intermittently and generally only in response to approved scope changes
   d. The performance measurement baseline is used only when implementing earned value measurements.

3. Problem solving involves
   a. Leading and managing
   b. Team development
   c. Power and politics
   d. A combination of problem definition and decision-making

4. At some point during the execution of your project, the following data is made available:
   Planned Value (PV) = $320, Earned Value (EV) = $280; Actual Cost (AC) = $290.
   What is the cost variance (CV)?
   a. Plus $40.
   b. Minus $30
   c. Minus $10.
   d. There is insufficient information to make a judgment.

PROJECT MANAGEMENT TOOLBOX

A Lesson from Winston Churchill

At the height of the crisis brought on by the fall of France in 1940, Winston Church issued this memo to his staff:

"Let it be very clearly understood that all directions emanating from me are made in writing, or should be immediately afterwards confirmed in writing, and that I do not accept any responsibility for matters relating to national defense on which I am alleged to have given decisions, unless they are recorded in writing." *

This may seem like a minor procedural point– not the kind of thing to bring up when Paris is burning. Churchill, however, had been in the cabinet in World War I, and he knew how the pressure of events distorted things. It's a very sensible precaution. I have adopted it in my project management; at the kickoff meeting, I tell the team that all decisions are issued or confirmed in writing. Here's why:

- The written word provides _clarity_. Sometimes we need to be more explicit in details than a telephone conversation can be. This is particularly important when gathering customer requirements,
- The written word provides a _token_ for completing a task. Listing a task in project management software makes it a deliverable. Once it has a place in the WBS, we have a symbol to track it. But we often do not include decisions in our project plans. The written word (even as an e-mail note) performs much the same function.
- The written word provides us with a _second chance._ Sometimes the decision in a conference is made without all the input necessary. A document gives those who weren't there a chance to inform us of some difficulty, which is peculiar to their area of expertise, for example.
- The written word is sometimes the product of _calmer heads._ The emotion of the conference room dissipates back in your cubicle. If you then must put down what happened in conference, it may become more palatable to the losers.
- The written word may be _carefully constructed_ to record not only the emotions of the participants but also the compromise that was made. When a compromise decision is made, it's usually best to hammer out the details in writing.

Most of us recognize the need for written communication in things like a customer requirements document. Because of the mass of written communication In modern business, however, we have tendency to avoid the written word whenever possible. This is not necessarily as efficient as it sounds. Indeed, there is one more reason for the written word that we'd like to forget'– but shouldn't:

The written word is the basis for the _lawsuit._ If I keep careful written records, and you have to remember telephone conversations regarding what we decided, whose version of events is going to prevail in court?

Even if you don't have a good case, your lawyer will know that by the records you kept.

* Winston S. Churchill, *Their Finest Hour,* Houghton Mifflin, Boston, 1949, pp17-18

John Hendershot

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Special Guest Speaker:
Joseph T. Kammerer
Deputy Assistant Secretary for Cost and Economics, Office of the Assistant Secretary of the Air Force, Financial Management and Comptroller, Washington, D.C.

Mr. Kammerer is responsible for directing the Air Force cost analysis and economic analysis programs. He is Executive Director of the Air Force Cost Analysis Agency, Chairman of the Air Force Cost Analysis Improvement Group, and serves as Chairman of the Investment Subcommittee of the Air Force Services Organization Board of Directors.

Five additional guest speakers from industry and government will present a variety of insightful and motivational lectures during the General Session.

Multi-Day Event Schedule:
Sun, May 18: Early Registration, Kickoff Evening Reception
Mon, May 19: All-Day General Session Forum
Tues thru Thurs, May 20-22: Applications, Theory and Technology Training Sessions
Fri, May 23: Optional Private Q&A Sessions (First Come Basis)
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12 March, 2003

Dear CAQ Stakeholder:

During the 2003 PMI Leadership Meeting in Tampa, Florida, USA, **Laurie Cooke**, Director of Professional Programs, and Denny Smith, Manager, Certification, met with specific interest group (SIG) representatives regarding the Certificate of Added Qualification (CAQ) product line.

Based on this input from SIG leaders and data from beta-testing the CAQs, we have decided to suspend further development of the CAQ product line. We are scheduling a series of webinars in mid-March to continue the initial discussion with SIG representatives who currently have a CAQ deployed or in development. Subsequent to these discussions, we will be having additional interactive presentations to ascertain the product needs of this important stakeholder group in alignment with PMI's Board of Directors' and Certification Board Center Board of Directors' strategic plans.
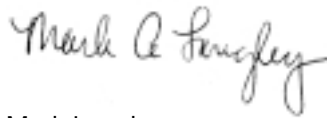
If you are developing CAQ exam preparatory materials, or are otherwise engaged in any exam-related development activities, you may wish to pause during this review period. PMI is notifying individuals who have requested to earn the CAQ credential of this suspension and would appreciate your assistance in this communication effort as well.

We appreciate the opportunity to discuss this matter with SIG leaders. Collaboratively, we shared information and came to a common understanding regarding the current situation and initial next steps.

We look forward to your valuable input during our webinar discussions that are being scheduled on 19 and 20 March.

Please contact **Denny Smith**, Manager, Certification Program at denny.smith@pmi.org, or 610-356-4600, ext. 1035 or me at mark.langley@pmi.org, ext. 1145. We will be glad to answer any questions you may have.

Sincerely,

Mark Langley
Managing Director

Member News

Ray Stratton has been selected to speak at the PMI Global Congress 2003—Europe. His topic is "Project Gates: 'Chutes & Ladders' for Project Management"

& Corrections . . .

The article published in the March 2003 Newsletter, "With Much Appreciation" was written by Glenn Eckels, VP Operations for the PMI-Inland Empire Article.

NEW MEMBERS *Continued from page 2*

Teresa Newton-Terres

Sarveshwar Nigam
Cap Gemini Ernst & Young LLC

Paul Queeney
Cartwright Electronics

James Odom
Cartwright Electronics

Ernest Orosco

Chris Parks

Jim Pickens

William Purpura
Boeing

Paul VanderValk
Prudential Financial

Thomas Walborn
Nokia Networks

Richard Warner
State Street

James Weyer

Wayne Winslow
Varco Intl.

Loretta Yeung
Princeton Financial Systems

Total New Members: 30
PMI-OC Membership: 965

NEW SERIES- COST CONTROL
CONTROLLING SOFTWARE COSTS PART 2

Software Critical Success Factors

Let's look at the software critical success factors as they apply to each of the three dimensions of software cost (strategic, quality, and implementation). If we were to start by drawing a parallel with the classic management parable about the workforce cutting a road through a forest it would go like this. The foreman cracking the whip and screaming at the workers to "cut faster" would be focusing on implementation costs. The job site supervisor walking around to ensure that the work is done to proper standards so that it does not need to be redone later or create problems during ultimate use is focusing on quality costs. The manager that climbs a tree, looks around, and shouts down "wrong forest" is focusing on strategic costs.

Strategic Costs and Associated Critical Success Factors

The most critical, and in many ways the most difficult challenge to overcome is to ensure that your software development dollars are focused on those projects that will offer the maximum strategic benefit to the organization. The associated critical success factors are as follows:

- Ensure that the organization's strategic direction is clearly and correctly defined.

- Ensure that software projects are defined and evaluated relative to their impact on the above strategy.

- Ensure that all members of the software team understand the strategic objectives that the software project must fulfill.

Quality Costs and Associated Critical Success Factors

Statistically, poor quality is the leading cause of software project failure (poor estimates/plans is number two). However, even if the poor quality does not cause a complete failure the downstream costs of poor quality can be staggering. It is not unusual for an organization to spend ten times the original implementation costs on software maintenance. It is not unusual for an organization to spend one-hundred times implementation costs on resources dependent on the software during deployment. The quality of the software has a huge impact on these downstream costs.

The problem is exasperated by the intangible nature of software. During development, a project that is badly behind schedule and under budget can quite easily appear to be on track. All that is required is for the team, intentionally or unintentionally, to sacrifice quality along the way. A requirement specification that should take 6 weeks can be completed in 4 by leaving some language vague. A design specification that should take 4 months can be completed in 3 by leaving out some details. Software testing that should take 5 months can be completed in 4 by not completely testing everything. In most cases, no-one is the wiser *until deployment*, when the end users are left to clean up the mess.

The key quality related critical success factors are:

- Detailed requirement documentation and tracking;
- Thorough test planning;
- Defect tracking and reporting;
- Implementation of software processes; and
- Training and, if needed, consulting in the above areas as needed to ensure consistent and proper usage.

Implementation Costs and Associated Critical Success Factors

Of course, implementation is where "the rubber meets the road". Mistakes during implementation can easily cause problems including:

- Delivery of a product that fails to meet the strategic objectives for that product;
- Delivery of a product that has poor quality and is difficult or impossible to deploy and maintain;
- Failure to deliver any useful product at all; or
- Delivery of a product at a cost that is significantly higher than necessary.

Because high quality is a prerequisite to a successful implementation project, the critical success factors described above apply to the implementation costs as well. The additional key critical success factors applicable to the implementation phase include:

Controlling Software Costs (cont.)

- Accurate estimating and planning;

- Configuration management, which is the process of managing and controlling different versions of the application as it is created;

- Project management;

- Software and database design;

- Content management, which is the control of graphics, images, text, and so on that will be used by the software application;

- Software data warehousing and executive reporting to support status monitoring, alerting, trend analysis, industry comparisons, and so on;

- Implementation of software development processes; and

- Training and, if needed, consulting in the above areas as needed to ensure consistent and proper usage.

Of course, all of this is easier said than done. Next month, we discuss some tools and techniques that will help make the process successful.

William Roetzheim is one of the world's leading experts on software project management and estimating, with over 26 years of relevant experience. He has worked in a software metric/process management position for the US Navy, Honeywell, the MITRE Corporation, Booz Allen & Hamilton, and Marotz, Inc. He was the original author of the Cost Xpert product and holds two patents (one pending). Mr. Roetzheim has 15 published computer software books, including *Software Project Costing & Schedule Estimating* (Prentice Hall), *The AMA Handbook of Project Management* (American Management Association), *Developing Software to Government Standards* (Prentice-Hall), and *Structured Computer Project Management* (Prentice-Hall). Mr. Roetzheim has over 90 published articles, has authored three computer columns, and has received 13 national and international awards. He has an MBA and has completed the coursework required for an MS in Computer Science. Mr. Roetzheim was the founder of the Cost Xpert Group.

BOOK REVIEW

Title: The Fast Forward MBA in Project Management
Author: Eric Verzuh
Publisher: John Wiley & Sons

Get a MBA by reading The Fast Forward MBA in Project Management?

…not quite, the intention of this book is not to provide the reader with an accreditation of MBA in Project Management. What this book does provide is enough information on the process of managing a project and the skills needed to run a project from start to finish. This is a good easy to read book for someone new to the process of project management or for someone who would like to make improvements on the project strategy they use today.

The thirteen chapters take the reader through the fundamentals of managing a project from definition, planning, executing, controlling and closeout. The author not only discusses project management concepts, but also provides practical examples on how those concepts should be applied. For example, the section on Risk Management lists the five different classic risk strategies; accepting, avoiding, monitoring, contingency plans and transferring risk. To support the strategies the author discusses the when, where and why of using each of the strategies supported with a template of a Risk Log.

The writing is straightforward and chocked with quick to, read real world case studies. Within each chapter Verzuh is sure to highlight what the <u>Key Concepts</u> are, provide <u>Tips</u> for managing certain situations and <u>Danger</u> identification for things to watch out for. The highlights are presented in a user-friendly manner and do not take anything away from the professionalism of the text.

Whether you are new to project management or just tired of reading about theory, I recommend this book. It is easy-to-read, valuable information in a portable format that will not just sit on your bookshelf. This book will surely help someone start to—**master**,—*become skilled or proficient in,* the process and the application of project management.

The Fast Forward MBA in Project Management is one in a series of books "The Fast Forward MBA…" by publisher Wiley & Sons

Lynn Thibert
KnowledgePlanet

MARCH PMI LEADERSHIP CONFERENCE

March PMI Leadership Meeting, Tampa, FL*A*

It was balmy, in the 80's, and (what my hair was telling me) at least 90% humidity. But no worries, we remained cool and dry (at least in the day-time) within the air-conditioned ballrooms of the Hyatt Regency Tampa Hotel. From March 5th through 8th, 300-400 PMI Leaders from around the world descended on Tampa to attend the annual Project Management Institute (PMI) Leadership Meeting. This was my first time to a PMI Leadership Meeting. Although I have attended and participated in numerous conferences and leadership meetings throughout my career, this one had a unique and welcoming feel to it, as well as being very worthwhile, professionally.

The PMI Leadership Meeting was advertised as an ideal forum for accessing the critical information PMI leaders need to continue development and enhancement of our most important assets – the tools and techniques for navigating the ever-changing environment of their components. –**We all agreed that this event met its mission.** Representing our Orange County Chapter were: **Adrienne Keane** (President), **Frank Parth** (VP, Programs), **Glen Fujimoto** (VP Communications), and **Victoria Flanagan** (VP, Corporate Relations). Also in attendance from Orange County were **Cyndi Snyder** (Chair-Elect, Chapter Leadership Development and Excellence Committee / LDEC) and **Ray Stratton** (VP, Research & Standards, PMI College of Performance Management).

Key session topics included the Keynote Speaker (see Frank Parth's recap of **Dr. Jerry Brightman's** opening session on page 18), CEO and PMI Chair Panel, Strategic Vision Presentation, Component Breakouts, and Regional Breakouts. Furthermore, various knowledge-sharing sessions were conducted and many networking opportunities were in place throughout the meeting. The most pivotal session was the

CEO and PMI Chair Panel, during which **Gregory Balestrero** (Chief Executive Officer) and Debbie O'Bray (Chair of the Board of Directors) immediately set a confident and open tone for the group. At the beginning of this Q&A session, **Greg Balestrero** outlined his vision and focus for PMI which he categorized into four areas:

1. Customer Centricity
2. Leadership as a Strategic Competency
3. New Product and Business Development
4. Trust is Fundamental in Every Relationship

Participant questions ranged from PMP certification and PDU's to Student Councils and Group Rates to the Strategic Plan and Best Practices. Every response from our CEO and PMI Chair were very forthright and supported Greg's four areas of focus. This Q&A session was only supposed to last for 45 minutes, but since there were so many important questions and a high level of group interest, Greg Balestrero changed

the schedule on the spot and extended this session to last about 2 hours. From the buzz of the participants during and after the session, this session demonstrated Greg's commitment to his leadership position and to further improving our global organization.

There was a lot of enthusiasm around the new **PMI Strategic Vision and Plan** which was presented by the PMI Board of Directors' External Relations and Volunteer Involvement Committee (or ERVI for short). ERVI is responsible for ensuring that PMI enhances and maintains relationships with PMI's stakeholders and constituencies and for ensuring that volunteer involvement is highly productive and satisfying…a very tall order. One of ERVI's key responsibilities is to communicate the Strategic Plan to PMI internal and external stakeholders and drive stakeholder participation in the development, buy-in, and implementation process. PMI's Strategic Plan of 3-5 years highlighted goals in five areas:

- Image and Brand
- Networking and Community
- Professional Development
- Knowledge
- Advocacy

After ERVI described the goals and objectives for each of the five Strategic Plan areas, the large session was broken into smaller facilitated groups. Each breakout group brainstormed on what our Chapters need to do to align to the 3-5 year PMI Strategic Plan and on what we see as our biggest related challenges. Each group generated a number of issues and great ideas which they shared as the entire session re-grouped. It was resoundingly clear that the individual Chapters shared several common needs:

PMI Leadership Conference (cont.)

- Headquarters needs to help Chapters on local issues
- Headquarters should provide more tools on branding,
- the Chapters need to investigate Best Practices from other Chapters.

In looking back across the different Chapters that I encountered throughout this meeting, it is interesting to note that there was a mix of Chapters with and without formal Strategic Plans. Some Chapters were waiting for the PMI Strategic Plan in order to start or complete development of their Chapter Strategic Plans. Also, the Chapters were on different levels of Chapter maturity, regardless of size or of duration of establishment. Only a handful of Chapters in attendance knew where their Chapter was with respect to the Chapter Organizational Maturity Model. [I am proud to say that our OC Chapter has already assessed our chapter maturity against the model, and we developed our Chapter Strategic Plan.] One thing remains clear – Regardless of size or maturity, each Chapter has at least one, if not many, Best Practices that can benefit other Chapters.

In summary, this Leadership Meeting was incredible! From the outset, all of the attendees who I encountered were very friendly and went out of their way to share the knowledge and tools of their Chapters in order to help others. There are a lot of Chapters around the globe doing some pretty cool stuff and your Officers gathered some great ideas that we are integrating into our initiatives. If you are interested in more detail about this incredible event or on a specific topic, feel free to contact Adrienne, Frank, Glen, or myself.

Victoria Flanagan

LEADERSHIP CONFERENCE
KEYNOTE SPEAKER

PMI Leadership Conference Keynote speech Dr. Jerome Brightman

Jerry is currently the president of The Leadership Group, a company specializing in leadership development, organizational learning, and similar advanced topics. He is also responsible for PMI's Leadership Training series. A well-known speaker on leadership principles, Jerry shared with us some of the qualities of leaders he considered most important.

He began the talk by quoting a study from the University of Ohio that showed that 86% of what leaders do can be broken down into two areas: working on job tasks or building relationships. A typical manager: administrates, accepts the status quo, controls, has a short-term orientation, is bottom-line oriented, worries about how and when things get done. A leader, by contrast, innovates, challenges the status quo, is people oriented, has a long-term view, looks at the horizons, and originates new challenges.

Most of the managers surveyed were very good at tasks, yet the survey, as did other surveys prior to it, pointed out that relationship skills are much more important for true leadership ability than task skills are. Motivating and developing people is much more important than anything else in an organization. As he quoted: "A manager does things right, a leader does the right things."

Leaders are people who always want to go further than anyone else. They see a vision of where the organization must go and communicate that vision so that everyone else can see it and want to go there. Jerry stated that "Good is the enemy of great." When you think what you have is good enough, you stop trying to make it better. This is an attitude that will always cause us to fall short of doing the best that can be done and will cause us to settle for something that's just "good enough."

One of the suggestions he had was to keep a journal of what you do and identify your activities as either:

- Event-related behavior such as problem-solving or firefighting
- Trend-related behavior such as identifying what needs to be done, or
- Structural-related behavior such as building the organization

This is similar to an approach recommended by **Peter Drucker** in the March-April, 1999, edition of the Harvard Business Review in which he recommended that whenever you make a key decision or take a key action, write down what you expect to happen. Nine or twelve months later compare the actual results with your expectations. Using this method you can identify your strengths and weaknesses very effectively.

Dr. Brightman talked at some length about the differences between IQ and Emotional Intelligence (EQ). Having a high IQ enables us to identify issues, gather data, and make decisions very quickly, yet these are task-oriented strengths. Having a high EQ gives us the ability to deal with people much more effectively and to lead them in moving towards the vision. He strongly recommended reading the article on setting expectations in the August, 2000, edition of PMNetwork™ and the book "Good to Great" by **Jim Collins**.

WCCC CONSTRUCTION
CONFERENCE & EXHIBITION

Local Conference Review
2003 WCCC Construction Conference & Exposition

James Flanigan of the Los Angeles Times meets with **Mark Greenwald** and **Victoria Flanagan** at the PMI-OC booth.

On February 20th and 21st, the Western Council of Construction Consumers (WCCC) held a conference and exposition in Irvine that attracted construction, engineering, legal, software, and management companies from across the U.S. WCCC is a non-profit construction trade association providing a forum for facility owners and construction service providers to share knowledge, explore innovative approaches, and collaborate and network with a common goal of improving construction practices. PMI-OC was privileged to take advantage of an exhibit booth given to us complimentary by Andy Wiktorowicz, WCCC Executive Director. **Mark Greenwald, PMP** and **Victoria Flanagan** (VP of Corporate Relations) were the volunteers who ran the PMI-OC booth during the exposition.

The Conference

The theme of this conference was "infrastructure for the next generation". The key objectives for participants were to learn about key infrastructure issues for the present and future, network and gain the competitive edge, address challenges shaping today's industry, improve the cost-effectiveness of today's construc-tion projects, and explore issues of common interest to the owners and construction service providers. There were a number of lectures and concurrent tracks specific to Legal, Project Management, Infrastructure, and Technology & Innovations.

Speaker **Ron Stein** opens the WCCC Conference.

James Flanigan, the Senior Economic Editor for the *Los Angeles Times*, was the keynote speaker for the conference. Mr. Flanigan shared his thoughts on the trends for the building industry and shared his opinions on the challenges facing California's physical, social, and economic infrastructure. He spoke of 8-10 million people appearing in California over the next 10 years from people who were already here, which some conference attendees disagreed with. It is most likely he is talking about combining people who live here who will be of age to move out of the household, plus people coming to California to look for work and to live on a temporary or permanent basis. Included in this figure would be immigrants and foreign laborers coming to work here. These people need housing and infrastructure to support them, including schools and hospitals. This point was very relevant to this audience since most of the attending conference-goers were in the infrastructure building business. Mr. Flanigan also spoke of laborers continuing to be cheaper and more plentiful in foreign countries. The trend being to export assembly and materials, while the creative jobs remain here – the brain power jobs.

One of the many interesting presentation topics was entitled "Electronic Project Documentation: Legal and Practical Problems" and was very pertinent across industries. **James G. Zack, Jr**. (Executive Director, Corporate Claims Management, FLUOR Corporation) talked about the legal sensitivities we should be mindful of and the precautions we should be taking specific to all forms of "e-copy", including web sites, shared and distributed files and folders, e-mail, etc. One emphasis was the legal importance of keeping privileged and private or attorney confidential information on a separate computer system than the one for business, in case a lawsuit claims your system for investigative purposes (discovery). It could be embarrassing to have to hand over your entire system if personal information is mixed in with business materials (i.e., taking work home to finish on your personal computer).

Attendees openly shared positive comments about their conference experience. **Andy Wiktorowicz** mentioned that "this was one of the best events ever with the most variety of programs and high-level speakers. The attendance was disappointing but it was competing with other events that were put on in the industry over the last 3 months. There was a lot of surprising information and the awards banquet was going to be full". A student attendee commented, "(I) learned more in one day than in several weeks of class". Another participant came to the event because of marketing– to get a feel where in the market his company stood in order to do some strategic planning 3-5 yrs ahead. He came to check out projects others were working on and what was coming via word-of-mouth from networking. As it turns out, he was able to start the process of a joint venture with another company by attending this meeting. In his opinion, for anyone in this industry, "attending is a priority."

WCCC Conference Review (cont.)

Bringing It Home with PMI

The conference attracted attendees with a mix of formal training and experience in Project Management. We noticed that some of the participants who were in construction management positions were brought up through the ranks and didn't have the total Project Management experience to go outside their jobs. We sensed they recognized that they needed more education; some have chosen the Construction Management Association of America (CMAA) certification and have had some reservation that it transfers outside construction. Visitors to our PMI-OC booth commented that they were interested to hear that we had an interest group (PMI Design-Procurement-Construction, DPC SIG) focused on their industry, and even more interested to learn that the DPC SIG was in the process of developing a Construction Industry extension to the PMBOK. One participant who had earned the CMAA certification was motivated to hear about the PMI PMP certification and has started the process, obtaining information and web site addresses to review the requirements in more detail.

In Summary

This was an excellent opportunity for PMI-OC to promote Project Management and PMI. We made great contacts and created awareness and interest in some of the conference attendees. We already received an invitation to conduct, in April, a PMI and Project Management training session for a construction management firm located in Orange County. Furthermore, we plan to collaborate with WCCC in the future on similar events, and on Project Management awareness and education initiatives.

As part of Corporate Relations, we are forming a local group focused on the Construction Industry. If you, someone you know, or your business are interested in getting involved in or learning more about this area or overall corporate relations, please contact Victoria Flanagan via e-mail at corporaterelations@pmi-oc.org. For more information about WCCC, go to their website (www.wccc.org) or contact one of our own Chapter members and a WCCC Board Member, Ron Stein.

Victoria Flanagan

PMI MONTHLY MEETINGS

DINNER MEETING

TUESDAY, APRIL 8TH, 2003

Program: **Project Management Lessons Learned in Howard Hughes' Hobby Shop How, against all odds, the Apache Helicopter emerged**

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 9:00 pm, Thursday, April 3rd, to obtain the "in advance" price. Reservations made after 9:00 pm, Thursday, April 3rd, will be charged the "At 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, April 6th, after 9 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

**FOURTH TUESDAY OF EVERY MONTH
APRIL 28TH, 2003**

Location: **Hilton Hotel**
(formerly The Red Lion)
3050 Bristol Street (near Paularino)
Costa Mesa
Atrium Café, Lobby Level
714-540-7000

Time: 7:15–8.45 a.m.

Register: Send your e-mail reservation to
Thomas Sippl at tsippl@pacificlife.com

Cost: Self-paid breakfast
Parking is validated

REGION 7 MEETING
LEADERSHIP MEETING

Career Breakfasts: An Idea from the Region 7 Leadership Summit

PMI-OC Board members **Adrienne Keane**, **Frank Parth**, **Kristine Munson**, **Glen Fujimoto**, and **Mike Beard** attended the Project Management Institute Region 7 Winter Leadership Summit 2003 on January 31 through February 3. The summit, hosted by the Tucson chapter, provided an opportunity to exchange best practices and discuss common issues with Board members from chapters in California, Arizona, and New Mexico.

The attending component leaders acknowledged that one of the most important challenges facing chapters is how to support individual members who are in the process of a career transition. Attendees informally agreed that between 20-25% of PMI members are actively looking for a new position.

The two San Francisco Bay area chapters launched job search groups. Over breakfast or lunch, small groups of between 12-15 members meet to discuss specific topics to help each individual in their job search. Topics have included resume review, elevator speech practice, and actual interview questions encountered. Group members also share potential leads. A volunteer facilitator ensures the sessions stay focused and on topic.

PMI-OC plans to launch a similar job search group in the second quarter. PMI-OC volunteers **Bill Postma**, **Jeremy Laundergan**, and **Andrew Chen** attended the first committee meeting to develop this new program. PMI-OC members will be receiving a survey via e-mail requesting suggestions for meeting locations/times and discussion topics. Please take a few minutes to complete and return this survey.

If you are interested in volunteering to help plan or lead a job search group, please contact Kristine Munson at kristine_munson@hotmail.com.

Kristine Hayes Munson, PMP
VP Professional Development

Keynote Speaker Review (cont.)

During the course of the lecture the audience performed an exercise using Post-It™ notes. We broke off into teams and wrote down what we needed to be working on, one item per note. Then one person on each team gathered the notes into categories. This allowed us to give maximum input with minimum criticism. The exercise allowed us to achieve a collaborative definition of what skills are needed as leaders.

Jerry kept the audience of 300 PMI component leaders fully engaged for the entire speech and made all of us realize how important it is to work together to make PMI the best organization it can be.

Frank Parth, PMP

ANSWERS TO PMP EXAM QUESTIONS

From page 9

1. **c. Strategic plan.** (Assumptions and constraints are outputs of the initiation process. The WBS is an output of Scope Definition process.)
   [Initiation] PMBOK 2000, paragraph 5.1.1, (page 53)

2. **c. The performance measurement baseline changes only intermittently and generally only in response to approved scope changes**
   [Planning] PMBOK 2000, paragraph 4.1.3.1, Outputs from Project Plan Development (page 44)

3. **d. A combination of problem definition and decision-making**
   [Project Management Context] PMBOK 2000, paragraph 2.4.4, page 25

4. **c. minus $10.**
   The CV is calculated by comparing the difference between the EV and the AC; or CV = EV − AC = $280 − $290 = − $10
   [Controlling] PMBOK 2000, paragraph 10.3.2.4, page 123.

PMI PROGRAM COMMITEE CHARTER

The PMI-OC Certification Preparation Program Committee will establish and maintain an ongoing program to provide educational opportunities that assist PMI-OC members in obtaining the various professional certifications offered by PMI e.g. Project Management Professional (PMP®) and Certified Associate in Project Management (CAPM™).

Authority:

The committee shall act under the authority of the Vice President Professional Development. The committee shall present written proposals and project plans to the Vice President Professional Development for approval. Upon approval the committee shall be empowered to act autonomously within the boundaries established by the written proposals and project plans. The committee will provide the Vice President Professional Development a monthly status report in writing regarding all activities to be used for input into the Vice President's monthly Board report.

Objectives:
- Plan and hold a minimum of two PMP preparation workshops annually providing participants a minimum of 35 project management education contact hours per session.
- Provide teaching/training experience for certified PMI-OC members by using PMI-OC member volunteers to instruct exam preparation workshops. Develop and implement programs to assist teaching/training volunteers to improve their individual skill sets in this area.
- Evaluate/select and/or develop tools and instructional materials to support annual PMP preparation workshops and other PMI-OC exam preparation courses.
- Solicit participant feedback for exam preparation educational opportunities, analyze feedback and implement appropriate changes.
- Identify exam preparation resources available outside of chapter. Work with website committee to provide a web-based repository for information located on PMI-OC website. Recommend reference material to be purchased by PMI-OC library. Communicate resource information via *Milestones.*
- Introduce one to three new exam preparation educational opportunities annually.
- Understand exam preparation competitive marketplace.
- Provide PMI-OC with steady revenue stream to be used to underwrite other chapter programs.
- Provide metrics on number of members who earn the desired certification after participating in PMI-OC sponsored exam preparation opportunities.
- Encourage non-members to join PMI-OC in order to obtain value from exam preparation educational opportunities.
- Document related policies and procedures to enable repeatable, sustained performance for program regardless of committee or sponsor turnover.

Budget:

See PMI-OC budget. Additional funding may be requested from Board on a project basis. Non-budgeted funding requests must be approved a majority of the PMI-OC Board.

Committee Organization & Responsibilities:

The committee shall divide itself into appropriate subcommittees to be overseen by the Chair and Co-chair. Recommended subcommittees include:

- Program Management (headed by chair and co-chair)
    - o Act as the central coordinator point for the program activities
    - o Recruit and supervise subcommittee leaders
    - o Create and maintain the strategic plan
    - o Maintain project scope statement and program/project plans
    - o Create and maintain the communication plan
    - o Create and maintain the risk management plan
    - o Oversee income goals and cost controls
    - o Create and maintain the program schedule and budgets
    - o Maintain the configuration management plan and process
    - o Create and maintain the program organization chart
    - o Obtain approval from Vice President Professional Development on strategic direction and plans
    - o Report to the Vice President Professional Development on program status and issues

- Quality Sub-committee
    - o Create and maintain the quality plan
    - o Audit the educational opportunities especially events for meeting students' expectations
        - Collect and collate student evaluations in a database
    - o Collect, document and publish lessons learned from educational opportunities especially events
    - o Maintain list of qualified instructors
        - Rate and provide feedback on each instructor
    - o Act as ombudsman for student-related issues
    - o Receive, log, and maintain list of all change requests
    - o Track and report certification rates resulting from each exam preparation educational opportunity

- PMP Preparation Workshop Scheduling and Class Sub-committee
    - o Maintain a five year schedule of classes
    - o Arrange classroom space and dates
    - o Arrange for the pre-class documentations for each student
    - o Produce student material hand outs
    - o Recruit and train student coordinator for each workshop
    - o Maintain the student coordinator process documentation
    - o Publicize upcoming workshops via *Milestones,* e-mail blasts, PMI-OC website and other appropriate vehicles
    - o Recruit and assign a project manager for each workshop

- Instructor Sub-committee
    - o Recruit, train and mentor exam preparation event instructors
    - o Schedule instructors for each exam preparation event

- Curriculum Sub-committee
    - o Establish criteria, evaluate, and select exam preparation curriculum to be used a each specific exam preparation event
    - o Identify and communicate to PMI-OC chapter membership and event participants availability of other exam preparation tools and materials

COMING EVENTS

APRIL 8 DINNER MEETING
Project Management in Howard Hughes' Hobby Shop
Speakers: Steve Garfein
Vendor Showcase: University of Wisconsin-Platteville

APRIL 8-11 PMI® SEMINARS WORLD
In San Diego, CA
See www.pmiseminars.org for more information

APRIL 28 PMI-OC BOARD MEETING
E-mail: info@pmi-oc.org for meeting information

APRIL 22 BREAKFAST ROUNDTABLE

MAY 3 OC-PMI ADVANCED TOPICS SEMINAR
8:30 am to 12:30pm at UCI Orange Campus
More details to follow next month

MAY 13 DINNER MEETING
Six Steps to the Future - How Mass Customization is Changing Our World
Speaker: Ed Fern, PMP
Vendor Showcase: PCI Group, Authorized Solution Provider for the
                                    Meridian Project

Project Management Institute
Orange County Chapter, Inc.
P. O. Box 15743
Irvine, CA 92623-5743

RETURN SERVICE REQUESTED