PMI ORANGE COUNTY MILESTONES

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Number 11

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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NOVEMBER DINNER MEETING

High Impact Project Management Tools & Techniques- Accelerated Learning used to Accelerate Projects

By Michelle LaBrosse, PMP, CEO

Accelerated Learning methodologies were developed over 40 years ago and have been used effectively to speed learning in a wide variety of fields. The same techniques that can be used to speed up learning, can also be used to speed up projects. This presentation gives an overview of accelerated learning concepts and how they can be applied to projects and project management. It engages the audience in a "high-impact", 100% hand-on, fast-paced, accelerated project management simulation so they can experience the concepts first hand.

The seminar is effective for groups as small as 10 and as large as 250. It will give participants a good understanding of the tools needed to design their projects for speed. Through the unique instructional techniques used in the seminar, participants develop the knowledge and confidence to insure they are aware of how they can get their projects get done fast, on budget, and meeting their customer's requirements.

Michelle LaBrosse PMP, CEO - Michelle LaBrosse is a noted expert in accelerated learning and accelerated project management. LaBrosse created her approach to accelerating projects using accelerated learning concepts during various facets of her 15 year career, as an Air Force Officer, while a Research Scientist in Systems Engineering and Learning Techniques and Technologies for United Technologies Research Center (UTRC) and as a project manager launching e-businesses. She has done extensive post-graduate work with the Massachusetts Institute of Technology Center for Advanced Educational Studies and the University of Washington Industrial Engineering Program in accelerating adult learning in corporate environments. Her research focused on using the Internet to accelerate adult learning and in determining effective adult learning strategies using accelerated learning with improvisational comedy.

Widely published and a contributing author of a variety of corporate internal publications on Productivity and Quality, LaBrosse's most recent book "Accelerated Project Management" was released by HNB Publishing in March 2002. LaBrosse resides in the Hartford, CT area with her daughters.

Vendor Showcase: Metafuse
See Ad on Page 11

NEW PROJECT MANAGEMENT PROFESSIONALS

Jessica J. Blischke	PMP-#74744
Garry Dean Buries	PMP-#73602
Rajasekhar Chevvuri	PMP-#73542
Michael Gobbo	PMP-#74740
Audry McGillicuddy	PMP-#73343
Lorrie Means	PMP-#73319
Robert O. O'Dea	PMP-#74741
Michael D. Phipps	PMP-#74996
Tobi Angela Raymond	PMP-#74720
Andrew C. Robison	PMP-#74222

New PMP's	10
Total PMP's	369

NEW MEMBERS

Mary Kay Allen
Southern California Edison

Linda Bagwell

Lanis R. Bell

Patti J. Culpepper
Boeing

R. Scott Davis
New Century Mortgage

Tim Ellis
Disneyland Resort

Jeffrey A. Friedman
Arcadis G&M Inc

Stacy A. Garcia
SBC DataComm

Lisa A. Hall
MWH

Daniel E. Healey
Option One Mortgage Corp

Sally K. Holdsworth
SBC-DataComm Inc

Deborah L. Issa
Toyota Financial Services

Hani Khairallah
Mina Ventures Inc

Deborah K. Kisow
Pacific Life

Ronald E. Kopp

Christopher A. Koslosky
WFS Financial

Jennifer A. Lowe
Marsh Inc

Cont. on page 18

THE PRESIDENT'S COLUMN

Opportunities for Learning and Sharing

The PMI-OC chapter mission states, "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". While preparing for the Annual Business Meeting last month, I reflected on how our chapter has grown and how we have expanded the opportunities we offer our project management community for learning and interaction. This month, I want to highlight some of our chapter's excellent program offerings.

Monthly Dinner Meeting
Held the second Tuesday of each month at the Wyndham Orange County Airport in Costa Mesa, our dinner meeting draws over 100 attendees. The program provides a social networking hour and a vendor showcase where attendees can learn about new PM tools and services. After dinner, the program consists of the formal vendor presentation and keynote speaker. Dinner meeting attendees earn 1 PDU (Category3) per meeting making the monthly dinner meeting a great way to help maintain your PMP credential. You can also learn about current topics and tools, job oppurtunities, as well as network with leading PM professionals in Orange County.

Breakfast Roundtables
PMI-OC conducts two monthly breakfast round table meetings: Hilton Costa Mesa on the fourth Tuesday and Cocos Laguna Hills on the third Friday of each month. The intent of the breakfast roundtables is to promote an informal gathering of 10 to 15 project managers to discuss current topics in the profession, receive suggestions from the other attendees about your current project challenges, and/or receive information on items of interest. Also, these meetings provide members who could not attend regular dinner meetings another way to participate and get greater benefit from their membership.

Additionally, the PMO Local Interest Group monthly breakfast roundtable is held at the Hilton Costa Mesa on the third Tuesday of each month.

Monthly Career Networking Meeting
Join us for a highly interactive networking and lead sharing session. We conduct several break-out sessions in which you will use your 30 second commercial to introduce yourself to a small group, tell the participants about your background, and what type of job you are looking for. The group will collectively assist you by passing on leads, personal contacts and company information that will be pertinent to your job search. Come prepared to return the favor as we rotate through all participants ensuring everyone walks away with a fist full of names and numbers that could help you to land a new position. Check the PMI-OC website for times and locations.

Advanced Topic Seminars
These half-day Saturday seminars, held approximately every other month, provide a deeper dive into advanced project management topics. Past topics have included software estimating, project participant assessment and Getting Top Dollars for Your PM Skills. PMPs earn 4 PDUs and all attendees meet fellow PM colleagues and learn new tools and techniques at a very low cost.

As you can see, I think we offer something for everyone. If you haven't attended a chapter event, why not give it a try this month? Details and registration for all PMI-OC events can be found at www.pmi-oc.org.

Our programs have come a long way since I joined PMI in 1996. We are always looking for new services and products to support our members, and the Orange County PM community. We depend on your suggestions for improving existing programs and ideas for new programs. Please contact me at president@pmi-oc.org or Frank Parth at programs@pmi-oc.org with your suggestions and ideas.

Adrienne Keane, PMP
PMI Orange County Chapter President

CHAPTER BOARD OF DIRECTORS ELECTED FOR 2004

A new Board was elected for 2004 by an overwhelming margin.

Quentin Fleming, past president and a member of the 2004 Nominating Committee, presented the slate at the October 14th dinner meeting. (The other two members of the Nominating Committee, ***Janice Preston*** and ***Dave Jacob*** were not present at the meeting.)

In accordance with the bylaws of the Orange County Chapter, only those attending the October meeting and who are PMI-OC members in good standing were entitled to vote. Write-in votes were are also acceptable. The following are the Board of Directors for the coming year along with the tally of votes each received:

	Confirm	Do Not
President Kristine Munson	**52**	**1**
VP Communications Bill Postma	**53**	**0**
VP Corporate Relations Victoria Flanagan	**53**	**0**
VP Finance Gene Dutz	**52**	**0**
VP Membership Tom Cumming	**52**	**0**
VP Operations Glen Fujimoto	**52**	**0**
VP Professional Development Frank Parth	**52**	**1**
VP Programs Terry Ehrhard	**52**	**1**
Trustee Adrienne Keane	**53**	**0**

There were no write in candidates

As one can readily observe, the Board is a synergistic blend of experienced hands and some new faces. We are sure they will take our Chapter to new heights, while building on the legacy of excellence established by past Boards. At the conclusion of the election, Quentin was overheard saying, *"Our Chapter is in good hands for the coming year."* The membership echoes his feelings. Congratulations to you all!

VOLUNTEERS AT WORK FOR YOU

All the chapter activities are performed by volunteers who offer their skills and time to advance the goals of the PMI-OC organization. PMI is a non-profit organization that relies heavily on the vast experiences and knowledge base of its members and volunteers.

PMI-OC's volunteer program offers a unique opportunity for participants to work side-by-side with other professionals to expand the Project Management methodology. Our volunteer programs are designed to facilitate meaningful growth for all members of the PMI-OC organization.

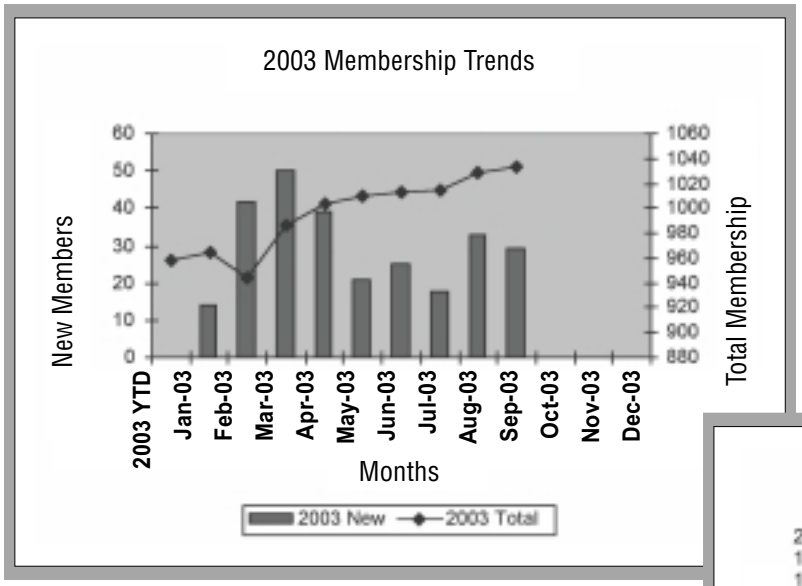
Some current PMI-OC volunteers who also deserve a big THANK YOU and special mention for their dedication and enthusiasm in organizing some of the programs we all enjoy are:

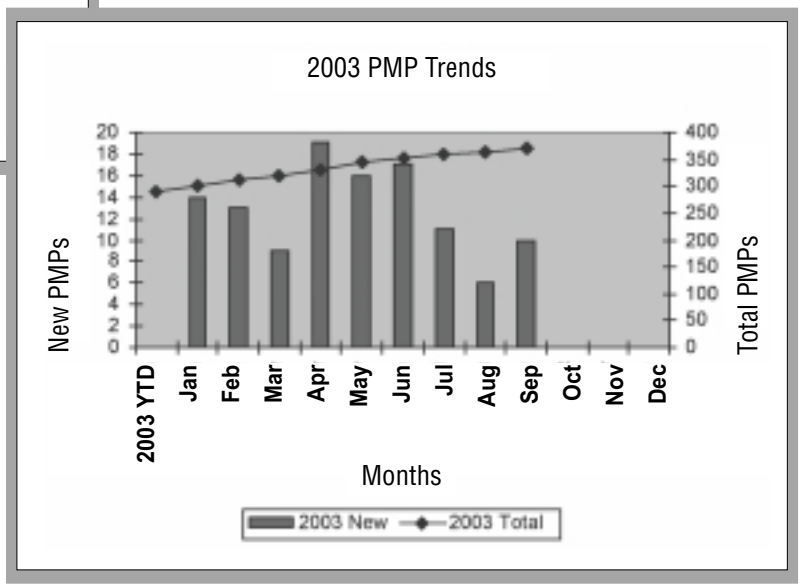
Behrad Fardi, who many of you have already met in his "ambassador" role at the dinner meetings, will continue highlighting new volunteering endeavors from this column, and the people who make them reality.

Victor Prebyl and Dan Stadler are assisting the VP of Programs with the organization of the Kerzner seminar, with the help of team members George Meier and Pradeep Chapalkar.

If you would like to participate in any of the volunteering opportunities available, get a great learning experience, or just want more information about them, please contact us at volunteer@pmi-oc.org.

MEMBERSHIP AND PMP TRENDS





PMI-OC Volunteer Appreciation Day

Anaheim Angels Vs. Texas Rangers, September 28, 2003

About 70 to 80 of PMI-OC's finest - our chapter's volunteers - enjoyed a day at the "Ball Park" Sunday, September 28th– the last game of the season. This day was designated by the Angels as Fan Appreciation Day because the paid attendance for this season exceeded 3,000,000. We all received a free Angels t-shirts.

Our event started out with a traditional Ball Park style lunch at the Hall of Fame room in the Angels Management offices on the west side of the stadium. Chapter members enjoyed: Chicken Wings, Hot Dogs, and Salads (also peanuts and Cracker Jack), while networking and observing displays on past accomplishments of Orange County's athletes.

The seats the chapter had were a short distance from the Hall of Fame room. We had a number of rows in section 134 on the field level at the end of the first base foul line. I think many of the younger members of our group (and the young at heart) were eager to catch a foul ball or home run. Alas, no fly balls came our way.

The afternoon was spent networking, getting acquainted and reacquainted with family members of our fellow volunteers, and talking about the ball game.

In the end, the Angels won the game, and Adrienne Keane, Frank Reynolds, and myself gathered up all the peanuts that Ed Walker accidentally dropped on our heads during the game and returned them to him airmail. We did not want him to feel unappreciated.

Thanks to Glen, and JC for a great Volunteer Appreciation Day.

Brent Felsted

TRY YOUR KNOWLEDGE ON PMP EXAM

(answers are on page 12)

Here is a sample of some questions:

1. You are a project manager in the training department of your company. In the past your company has offered a PMP exam workshop. When PMI re-structured the exam format to reflect the five process groups, your management decided to revise the workshop accordingly and assigned you as the project manager. The following are all possible reasons for initiating a project. Which one would be the *closest match* to this situation?
   a. A technological advance
   b. A social need
   c. A business need
   d. A legal requirement

2. The completion of the initiation process results in the following:
   a. The project team is formed
   b. The project manager may be assigned
   c. Staff acquisition takes place
   d. Establishes the start of the kickoff meeting of all team members

3. The difference between the terms "corrective action" and""workaround" is:
   a. There is no difference. They are synonymous.
   b. "Workaround" is a response to a risk event, whereas "corrective action" is/are changes to bring future performance of the project in line with the plan.
   c. "Corrective action" is a response to a risk event, whereas "workaround" is/are changes to bring future performance of the project in line with the plan.
   d. These terms apply at different points in the project life cycle.

4. An example of a work result is a:
   a. Work package
   b. Work order
   c. Deliverable
   d. Project plan update

KARMA CLUB

How Good Are Your Networking Skills?

The October 8, 2003 PMI-OC Career Networking Event was an oppurtunity to learn how to automate your network, acknowledge your chief marketing officer and assess your networking skills. To facilitate this interactive evening, the participants were divided into three groups with rotating speakers: Melanie McCarthy, Sr. VP, IT Professional Services for Systems Management Specialist, Sandy Putnam, Principal, Back To Work Connection, and Gregg Parker, Resource Systems Incorporated.

Melanie McCarthy's (Melanie.mccarthy@sms-ito.com) focused on how you **automate** your network. That is, how you put a bug in peoples' networking ears so that they think of you, not Edna May Farnsworth when an opportunity pops-up. Benign neglect is not the answer, it's "guerrilla tactics" with a compassionate twist. Keep in mind that "you're a professional first, unemployed second." So,

- Attend events early and vote often with a handshake and a smile. It paves the way for your elevator speech.
- Mix and mingle, don't spend the entire event with one person and let those business cards flow.
- Follow-up with people and give them a bit of information that shows them you were listening, not just waiting to pounce on them with your 30 second commercial.
- Be forward-looking, not backward-reflecting when representing yourself.
- Like the top 1/4 of your resume, focus your initial comments on the company's needs, not your wants.

Putting it succinctly, Melanie said, "Networking is relational, not transactional. So, help someone else. You'll get more than you ever dreamed."

"How many of you have a **Chief Marketing Officer** for yourself?" asked **Sandy Putnam** (www.back2work.biz). The silence was deafening. Sandy shot back, "If you don't do it, it won't get done." You have to champion yourself, but that does not mean you have to be obnoxious, insensitive and arrogant in the process. Leave that to your competition. Here are at least three things you can do to market thee.

First, brand yourself. Develop a ten second statement that sets you apart from the crowd. For example:

"Nice to meet you, Arnold. My name is Paula and I am very excited to be at this conference. It's going to give me the opportunity to speak with people like yourself about the process I used to bring my last three projects in on time and within budget."

It does not have to be earth shaking, but it should create some movement. **Second**, revise your resume every month or two, noting your latest achievement or emphasizing a different strength. You don't have to make a radical change, just tweak it to draw the reader's attention to another value rich asset you bring to the table. '**Third**, create a new business card; one that features your differentiator. For example:

- Have Problem, Will Solve
- A Network in Time, Avoids a Bind
- Manage the Risk, Not the Failure

Give the card reader something to think about so she asks, "Could you give me more information about yourself?" Oh boy, I smell elevator speech.

"Have an out-of-body experience," says **Gregg Parker** (gregg.parker@personalcode.com). "Imagine listening to yourself and the person you're talking to. Look at it as an opportunity to learn what you are doing well and what you need to improve on. It works." Gregg, like the other speakers reminded the audience to take an interest in the person you are speaking with. It pays dividends. It alerts them that you are on the same page they are on. It can also alert you that you might need to be on a different page. So, either change the page or change the person, but be polite. You never know when your paths might cross again.

If you are having difficulty engaging yourself with others, Gregg suggested that you make yourself the host. That is, pass out papers, seat people, register participants, do set-up work, volunteer to clean up, make the coffee, etcetera. Anything that makes you part of the process makes you part of the solution. It helps you relax and focus on your mission: get two network contacts every time you attend an event. The more you do it, the easier it becomes and the more likely you are to move to level 2, "Who do you know who might help me land an interview at Data Plus Life?" or level 3,""Thanks Ed for getting me an interview with the hiring manager at Digital Futures."

In today's market you have to be in network mode if you want to become successful and remain successful. Yes, some days are more difficult than others to network, but don't give up. Develop a small support group where you can share your successes and failures. Reward yourself when you regenerate old contacts, extend existing contacts and make new contacts. Know your mission.

The material distributed at this PMI-OC Networking Event was very helpful. The *Networking Assessment Test* administered by Gregg Parker and the "Effective Networking Some Final Do's and Don'ts" section both amplified the speakers' mantra: *networking is about people helping people help themselves*.

Gene Dutz

BALTIMORE'S PMI LEADERSHIP MEETING

SEPTEMBER 18-20TH, 2003

"Hurricane Isabel, a 4-5 on the Saffir-Simpson Hurricane Damage Potential Scale."

Now I don't know what a 4-5 on the Saffir-Simpson scale meant but it sounded dangerous! Luckily for the 400 people attending the PMI Fall leadership meeting, hurricane Isabel was downgraded to a 1 by the time it arrived in Baltimore on the evening of Sept. 18th. The winds still blew mightily at 74-95 mph, Fells Creek still got flooded by storm surges of 4-5 feet, and my hotel had no clean towels or sheets for 3 days. Although hundreds of thousands of people lost power, the outcome of the storm was much better than what many people had feared. Thus one of the worst storms of the century came in the midst of the best leadership meetings put on by PMI. In more ways than one the Baltimore PMI Leadership meeting was a *"BLAST."*

For those of you who may be slightly confused (as I was), the Leadership meeting preceded the PMI Global Congress. It was located at the Baltimore Convention Center and formally began on Wednesday, Sept. 18th, closing on Sept. 20th before the Awards Reception that kicked off the opening of the Global Congress. PMI Leadership conferences take place semi-annually and are held so that component leaders can meet other leaders, learn, share best practices, and find out about PMI-HQ developments. As before, the Leadership meeting contained various concurrent PMI operational updates, open spaces, and education tracks. The educational tracks were:

- Progressive Leadership #1
- Progressive Leadership #2
- Data Exchange Program (DEP)
- Volunteer Development
- Strategic Planning for Components
- Community Through Components
- Learning Sharing
- Component administration

I focused on the Strategic Planning for Components track. This consisted of two sessions on Friday afternoon and culminated with a general session on Saturday morning:

1. **Component Maturity and Strategic Planning**, presented by Murray Grooms & Greg Stine, PMP
2. **Strategic Planning for Components** by Adrienne Keane, PMP, & Victoria Flanagan from PMI-Orange County
3. **The Future of PMI – Our Strategic Vision** by Debbie O'Bray, Marge Combe, Louis Merken, Debra Miersma, and Greg Balestrero (PMI Board and CEO)

Component Maturity and Strategic Planning
"The Right Actions for the Right Size." Components, such as the Los Angeles chapter contain a lifecycle of multiple stages. A component begins as organizational, then becomes operational, next developmental, grows to be strategic and eventually reaches the stage of full maturity. At any point of this lifecycle there may need to be some sort of revitalization and perhaps even dissolution. There are three main metrics that define a component's maturity level:

- Mission / Vision – how well does the organization understand what they do and why
- Awareness of environment – understanding of the organization's position and function within other components
- Ability to change and adapt – readiness and flexibility to adapt to changing conditions

In order to grow from one stage to the next, the component must assess its current position, select the desired future position, identify the resources and additional competencies needed, and plan for how the component will perform at the desired level. The process by which the component reaches the next level is a key factor in its growth and maturity.

Strategic Planning for Components
"Shaping Your Component for Today, Tomorrow, and the Future." The PMI Orange County chapter went through a huge growth period in the last 4 years. It grew from 388 members in 1998 to over 1,000 members in 2002. This rapid growth posed challenges: for example newsletter production became more expensive and larger facilities were needed as dinner meetings attendance grew by leaps and bounds. Therefore, the chapter board began an assessment in mid-2002 and determined that the chapter was in the Developmental Stage of its lifecycle and ready to move into the Strategic Phase. They then began to develop a strategic plan and process and also established a governance committee.

PMI-OC found that the strategic planning process consists of four major phases:

Phase 1: Assessment
Phase 2: Visioning
Phase 3: Direction Setting
Phase 4: Operational Planning

PMI-OC cited the following lessons learned and recommendations in setting up a strategic plan:

- Include experienced person(s) throughout the process
- Name a process owner & facilitator
- Use small workgroups
- Complete before the fiscal budgeting process
- Dedicate adequate time for Board of Directors
- Establish the planning calendar early
- The strategic planning process takes time to develop and will evolve over time
- Allow 1 month for phase 1 and about 2 months for each of the following 3 phases

Cont. on page 12

CUTTING THROUGH THE CONGESTION

—It's All About the People!

Rick Grebner from OCTA speaks to PMI-OC membership.

Rick Grebner and Leonard Sequeira gave a very encompassing review of the Orange County Transportation Authority's (OCTA) mission. Grebner is OCTA's project manager and Sequeira, his preferred contractor.

In 1990, the Orange County voters approved a one-half cent sales tax for a balanced program of transportation improvements. A nine-member Citizens Oversight Committee, approved by the voters, provides the oversight of the diversified investment program called Measure-M and its components shown in Table 1.

Any project has stakeholders. For OCTA, it is a careful juggle of relationships and communications among all stakeholders which are:

- OCTA Board of Directors
- Citizens Oversight Committee (COC)
- Caltrans
- The People of Orange County

Grebner presented the progress that OCTA has achieved at the intersection of the I-405 and SR-55 freeways.

Interstate 405 cuts through Orange County like a mighty river, transporting cars like silt into numerous, major tributaries. In Costa Mesa, it meets State Route 55, and together these two raging freeways form one of the 10 busiest intersections in the country. "There is never a moment when there are no cars," he said. "Even in the middle of the night, when you think that there aren't many vehicles on the road, the traffic can back up for long distances." To reduce the congestion, the project's owners, the OCTA and Caltrans, have laid out a $125 million improvement plan for this major interchange, scheduled for completion in spring 2004. The I-405/SR-55 Improvement Project is a partnership between OCTA and Caltrans. Seventy percent of the project's funding will come from Measure M, and the balance from federal and city of Costa Mesa funds. Scheduled for completion in spring 2004, the initial $47 million segment includes five major components:

1. Widening MacArthur Boulevard under the 55 Freeway
2. Reconstructing Red Hill bridge over the 405
3. Widening Main Street under the 55
4. Building a new HOV structure to connect the southbound 55 with the southbound 405 and the northbound 405 with the northbound 55
5. Rebuilding on and off ramps to John Wayne Airport in Santa Ana

The project's highlights appear in Figure 1 and Figure 2: new direct carpool lanes are connecting the southbound 55 with the northbound 405 and the reverse. This segment will also feature a new off-ramp from the northbound 405 to Avenue of the Arts and a new on-ramp to the northbound 405 from Anton Boulevard.

Freeways	Freeways are the cornerstone of the Measure M plan, with 43 percent of the total revenue earmarked for these improvements. To date, most of the freeway widening projects, including the I-5, SR-91, SR-57, and SR-55 projects, have been successfully completed.
Local Streets and Roads	Measure M allocates 21 percent of its funds for various improvements to local highways and regional streets and roads. During the past 12 years, nearly one-half billion Measure M dollars have been earmarked for local jurisdictions to coordinate signals, provide turn pockets, add extra lanes, and create better access to freeways. The county and 34 cities submit applications to compete for Measure M funds to help reduce traffic delays and congestion. As part of the Measure M Local Turnback Program, all eligible Orange County jurisdictions also receive 14.6 percent of the sales tax revenue based on population, arterial highway miles and total taxable sales. To date, more than $303 million in Measure M Turnback funds have been allocated to Orange County cities and the County.
Regional Streets and Roads Program	Eleven percent of Measure M funds are allocated to enhance Orange County's regional road network. Plans call for developing smart streets, upgrading the interchanges between arterial roads and freeways, and improving the efficiency to the existing road system.
Transit	Twenty five percent of Measure M revenue is allocated to improve transit and stabilize bus fares for senior citizens and persons with disabilities. Other improvements in the transit component include expanded Metrolink commuter train service between South Orange County and Los Angeles, and San Bernardino and Irvine, as well as carpool connectors on the I-5 and SR-91 freeways.

Table 1: How Measure-M funds pay for OCTA's projects.

OCTA was formed in 1991 to consolidate seven separate transportation agencies. It is governed by an 11-member board and has ten strategic initiatives which appear in Table 2.

OCTA's Ten Strategic Initiatives		
1.	Light Rail Transit – The Centerline	$966
2.	Bus Rapid Transit	$958
3.	Express Bus Service	$40
4.	Enhanced Bus Service	$260
5.	Enhanced Metrolink Service	$250
6.	Street and Road Improvements	$720
7.	Encourage Carpooling	TBD
8.	Freeway Bottlenecks	$380
9.	SR-91 Improvement Program	$180
10.	SR-22/I-5 Far North	$700
		$4,454

Table 2: Measure-M funding of OCTA's ten strategic initiatives.

CUTTING THROUGH THE CONGESTION (CONT.)

There are also new direct carpool lanes connecting the southbound 55 with the northbound 405 and the reverse. This segment will also feature a new off-ramp from the northbound 405 to Avenue of the Arts and a new on-ramp to the northbound 405 from Anton Boulevard.

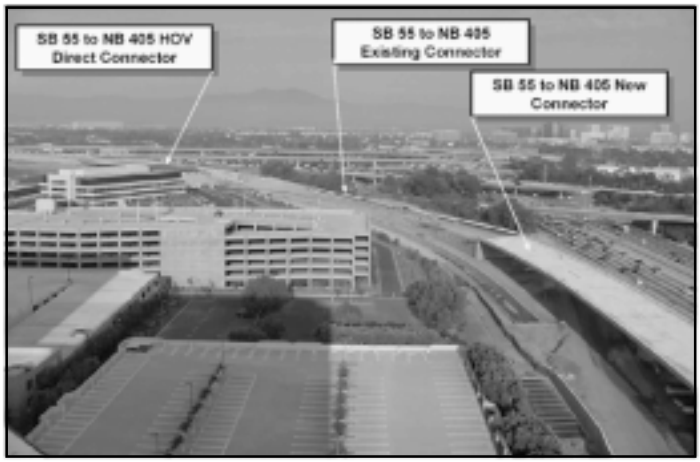


Figure 1: Eastbound view of the intersection between the I-405 and SR-55 freeways. HOV stands for high-occupancy vehicle**.**

Figure 2: A New Freeway Interchange in Orange County Aims to Improve Traffic Flow in Airport/South Coast Plaza Area. Westbound view of the freeway intersection shown in Figure 1. MOS stands for minimum operating segment. As any other government agency, OCTA lives by its own acronyms.

Orange County is obviously no longer the county of the 19th and early 20th century. Even as little as 50 years ago, the county had numerous citrus groves, bean fields and quaint beach villages. Today, Orange County is emerging as the:

- Second most densely populated county in CA
- Fifth most densely populated county in US
- 600,000 new residents by 2025
- 300,000 new jobs by 2025

To control its projects, OCTA uses a variety of controls. Project controls based on:

- Measure M Ordinance
- Freeway Strategic Plan
- Project Specific Scoping Documents
- Project Change Request Procedures

Key construction controls on its project sites include:

- Contracting and administration through Caltrans
- Field staffing through OCTA consultants
- Construction funding limited by 5% contingency
- Extensive change order review process
- Contract amendments require OCTA Board approval

Key financial controls include:

- 36-month cash flows
- Long Range Financial Plans
- FY Budgets
- Internal Budget-to-Actual Reporting
- Annual Audits
- Quarterly Report to COC

OCTA's performance record is impressive which has resulted in:

- Freeway Projects nearly complete in first ten years
- Highest credit rating in the nation for municipal agencies
- Measure M expenses expected to be lower than Strategic Plan

How then does he do it? Rick summarizes his six maxim as:

1. Hire the right people
2. Strength in unity
3. Relationship management
4. You do anything you set your mind to it
5. Value the team member as a person—not a resource
6. It is all about the people

Frank Parks, VP of Programs, with Speakers Rick Grebner (Left) and Leonard Sequeira (Right)

These maxims are simple enough. As we can see every day that we travel the freeways of Orange County, they have guided him through many successes. Perhaps because they are so general, any of us can do well in adopting them.

George D. Meier, PMP

WEDNESDAY, NOVEMBER 19, 2003

PMI-OC CAREER NETWORKING EVENING

KARMA CLUB

Join us for a highly interactive networking and lead sharing session. We will conduct several break-out sessions in which you will use your 30 second commercial to introduce yourself to a small group, tell the participants about your background, and what you are looking for. The group will collectively assist you by passing on leads, personal contacts and company information that will be pertinent to your job search. Come prepared to return the favor as we rotate through all participants ensuring everyone walks away with a fist full of names and numbers that could help you to land a new position.

When:	6:00 p.m. - 8:30 p.m. (Registration and pizza starts at 6:00 p.m. Program starts at 6:30 p.m.)
Where:	SMS Outsourcing, 3300 East Birch Street, Brea, CA 92821 www.smsoutsourcing.com
Cost:	$5.00 PMI-OC Members / $10.00 Non-members (Covers pizza and soft drinks.)
Register:	**www.pmi-oc.org**
Questions:	E-mail professionaldevelopment@pmi-oc.org

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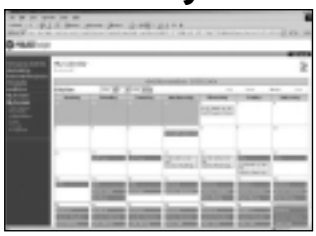

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Answers to PMP Exam Questions

From page 5

1. c. A business need
[Initiating] *PMBOK* paragraph 5.1, (page 53)

2. b. The project manager may be assigned
Assignment of the project manager is an output of the initiation process [Initiating] *PMBOK*, paragraph 5.1.3.2, (page 55)

3. b. "Workaround" is a response to a risk event, whereas "corrective action" is/are changes to bring future performance of the project in line with the plan.
PMBOK 2000, Glossary, (pages 199 and 209)

4. c. Deliverable
A deliverable is "any measurable, tangible, verifiable outcome, result or item…" *PMBOK 2000*, Glossary, (page 200)

LEADERSHIP MEETING (CONT.)

(Cont. from page 7)

Once the strategic plan is created, it must be communicated, the annual budget completed, resources mobilized to execute the plan, the plan utilized in governance processes, and quarterly health checks must be instigated. PMI-OC is willing to share additional information with other PMI components.

The Future of PMI
– Our Strategic Vision

"A Call for Change." About a year ago, the PMI board of directors realized the need to set the strategic direction for the future of PMI and began to create a model for strategic planning. This model includes:

1. The Long Term Goal (10-30 years in the future) – Worldwide, organizations will embrace, value, and utilize project management and attribute their success to it.
2. Critical Factors (5-10 years) – Assumptions, issues, and strategic principles.
3. Strategic goals (3-5 years) –
   a)Professionals and organizations associated with PMI will be recognized worldwide for consistent delivery of project management excellence and success.
   b)Individuals and organizations will benefit from PMI's efforts to facilitate and promote community among those who practice project management.
   c)Practitioners and organizations that participated in PMI professional development activities will be preferentially valued by organizations seeking project management expertise.
   d)PMI will be the world's premier source and resource of project management-oriented knowledge and expertise.
   e)Through the advocacy of the Institute, leaders and decision makers in all sectors will integrate project management in order to achieve organizational results.
4. Action Planning (1-2 years) – Plan reviews, priority setting, program and operational planning.

The PMI strategic plan is implemented through the business plan and budget. Alignment occurs through the **Balanced Scorecard**. The method will be to mobilize change through executive leadership by:

- Creating the climate for change
- Creating the leadership team
- Creating the vision and leadership
- Creating team accountability
- Changing the culture

Components are encouraged to build component strategy to help drive PMI strategy. The PMI board will further develop and refine portions of the PMI Strategic Plan through the end of 2003. Stay tuned with your component leaders for additional information on PMI strategy at work, the PMI balanced scorecard, and the benefits for members.

In conclusion then, I certainly met other leaders, learned, shared best practices, and found out about PMI-HQ developments. Although the operational presentations were delayed to Saturday afternoon because of hurricane Isabel, I found the Baltimore Leadership Meeting a great success and look forward to the leadership meetings in Vancouver, Canada and Anaheim, California next year.

Margaret Y. Chu, PMP
PMI-LA Finance Director
Greg Eisenbrand, PMP
Contributing Editor

HERO OR THE GOAT?

We've all been there … at home plate or on the pitcher's mound, like good ol' Charlie Brown, wondering if our next move will make us the Hero or make us the Goat.

Most of us stand at the crossroads of Hero and Goat whenever we go to contract for a new course. We sweat through the scope, content specifications and media selection with the salespeople. And the costing, of course. Then we sweat selling the proposition to management. It's a blind buy for everyone, so we *really* sweat the first delivery, as if it were Opening Night at a Broadway show, where everyone's anxious for favorable reviews. With direct training costs running over $2000 per student week, egg-laying Goats have short corporate lifetimes!

The Blind Buy

The notion of blind buying usually applies to products like mattresses, where we can't see what's inside the outer cover without cutting the product open. But we generally try out the mattress on the showroom floor, to satisfy ourselves that it meets whatever our preferences may be in mattresses.

Buying clothing, we can touch and see the product, but we can't rely "blindly" on the printed size specifications to predict how well the garments will fit. Even the mass merchandisers of low priced clothing have fitting rooms, an "essential convenience" that reduces the risks (inconvenience) of blind buying and merchandise returns.

The Paradox

Why do we blind buy $2000-per-student-week course products, when we won't even blind buy a $20 pair of knock-off khaki's?

What a revoltin' development this is!

We seem to apply the same purchasing techniques to procuring training as we do for paper towels: we level the playing field by specifying the topic, content points, length, frequency, etc. such that all vendors are quoting the "same" product. We let them romance us, and we shop them for price and terms. Then we pray for those favorable student reviews!

As if student reviews define our success! There are two flaws in this thinking. The first flaw is in the timing of when we solicit feedback: students are usually polled immediately upon completion of the course … BEFORE they are challenged to actually apply what they learned (or didn't) on the job. (Insert your own horror story here; we all have them, particularly those of us involved in technical training.) The second flaw lies in whose opinion we solicit. Yes, we want to hear from students about the perceived quality and value of their educational experience, but our success as business partners is defined by a different group of stakeholders: the executives who invest trust, time and money in our training of their employees. These are the stakeholders who declare us Heroes or Goats, not the students!

Just as student reviews don't measure our success with a course or vendor, we can't rely on references and testimonials to predict success, either. There are obvious and not-so-obvious limitations to the utility of references and testimonials. We're all familiar with the most obvious: vendors provide reference and testimonial sources that are favorable to their interests. (Unless you ask specifically for a negative reference; try it sometime, it can be very illuminating!) At a more subtle level, the validity of a reference or testimonial, no matter how candid, is gated by how closely your situation and requirements match those of the individual(s) providing the comments. No two individuals experience taste, pain or satisfaction quite the same way; neither do organizations.

Lights On !

To break out of blind buying, and increase our chances of being Heroes, (not Goats)… we move away from the purchasing model, and embrace the three classical tests of the employee hiring model: Can (s)he do the job? (Capability); Will (s)he do the job? (Willingness); Will (s)he fit in the organization? (Fit).

Let's repaint them slightly to fit our circumstances:

Capability: In the vendor selection scenario, we verify *fitness to deliver.*

Willingness: Translates directly to *time and cost*. Will this vendor deliver in my timeframe, and within my budget?

Fit: Assess the "fit" of prospective vendors and products with *demonstrations* of who they are, what they do and how they do it. The demo is the equivalent of the fitting room, and the personal interview.

Here's a quick primer on demo's:

• Invite vendors on your short list to demonstrate how they address the specific needs and concerns of your stakeholders: students and executives. Both stakeholder groups should be represented on your demo evaluation team, along with the appropriate decision makers from your own organization.

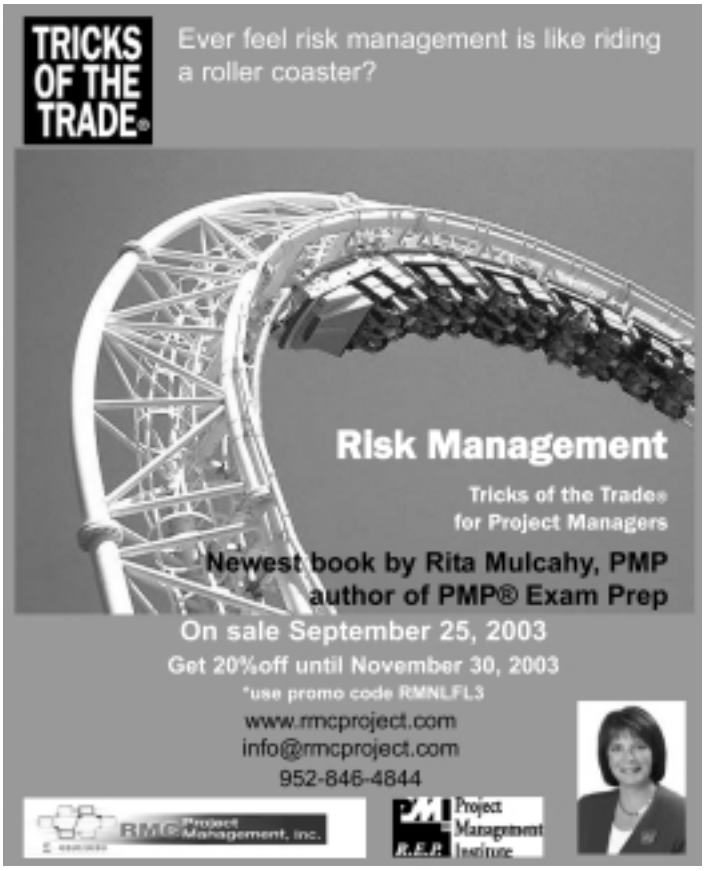
• Let the vendors know explicitly what your hot buttons and expectations are. There's no percentage in abandoning blind buy to adopt blind bid! Again, you want to assess the vendor's ability to meet your specific educational requirements within your specific educational and cultural environment.

• Ensure all the players agree on the format and content for the demo. It can be an actual course module, or even a purpose-designed simulation that showcases a range of approaches and abilities within a compact timeframe. Whatever the format, your evaluation team must be clear on the assessment criteria … the negotiables and non-negotiables (deal-breakers) … before the curtain goes up.

• Go into the demo ready to commit to purchase. Think of the demo as the final step in the evaluation process. You already have the right people in the room, you've identified your hot buttons, and you've chosen the format specifically for the purpose of decision-making. As a professional courtesy to your colleagues and to your vendors, complete all the due diligence BEFORE staging the demo. And expect the vendor to ask for your business.

• Resist the too-easy alternative approach of "sitting in" on classes being delivered to vendors' existing clients. Yes, the logistics are far simpler than staging a dedicated demo … but both you and the vendor share the risk of your evaluating the wrong product! Even if the subject matter is identical to what you need for your students, the organizational hot buttons and expectations are not necessarily the same as yours!

Cont. on next page



HERO OR THE GOAT?

(Cont. from previous page)

View from the other side

Demo's are as much a win for your vendors as they are for you. A demo is the vendor's best opportunity to have you experience their craft and style first-hand, "up close and personal,". Value propositions come to life; instead of being an observer, you take mental possession as a participant. Brochures, videos, and PowerPoint presentations can never match the intimacy of this experience. And in the process, vendors accomplish their own key marketing objectives: decommoditization, and differentiation. The demo event illuminates distinct corporate and individual personalities, for vendor and client alike, that are otherwise blurred in the endless procession of golf shirts and khaki pants. Expect sharper vendors to suggest demo's for exactly this reason … even before you do.

Full Count, Bases Loaded, Two Outs

The next time you're standing at the crossroads of Hero and Goat when contracting for courses, you'll push your Hero odds favorably by:

- Adopting the capability/willingness/fit tests of the hiring model
- Short-listing prospective vendors based on capability and willingness
- Selecting from the short list based on fit, as assessed by evaluation of demonstration events
- Ensuring all stakeholder groups participate in the selection process, i.e. the demo's
- Explicitly articulating your needs, wants and hot buttons to the vendors when booking the demo's
- Being ready to write the order upon completion of the demo event(s), having done your due diligence as part of your short-listing process.

There's always room at the table for one more Hero. Goats are left outside.

Right, Charlie Brown?

Jed Levine, PMP
Cheetah Project Management
East Hartford, Ct

About Jed Levine, PMP

Jed trains project managers to be more effective, efficient and take-on their projects with less margin for failure, ultimately, getting projects on track and completed successfully. In fact, this technique has been the cornerstone of Cheetah Learning's management and instrumental in enabling us to grow by a factor of ten each year we have been operating. For more information visit us online at www.cheetahpm.com

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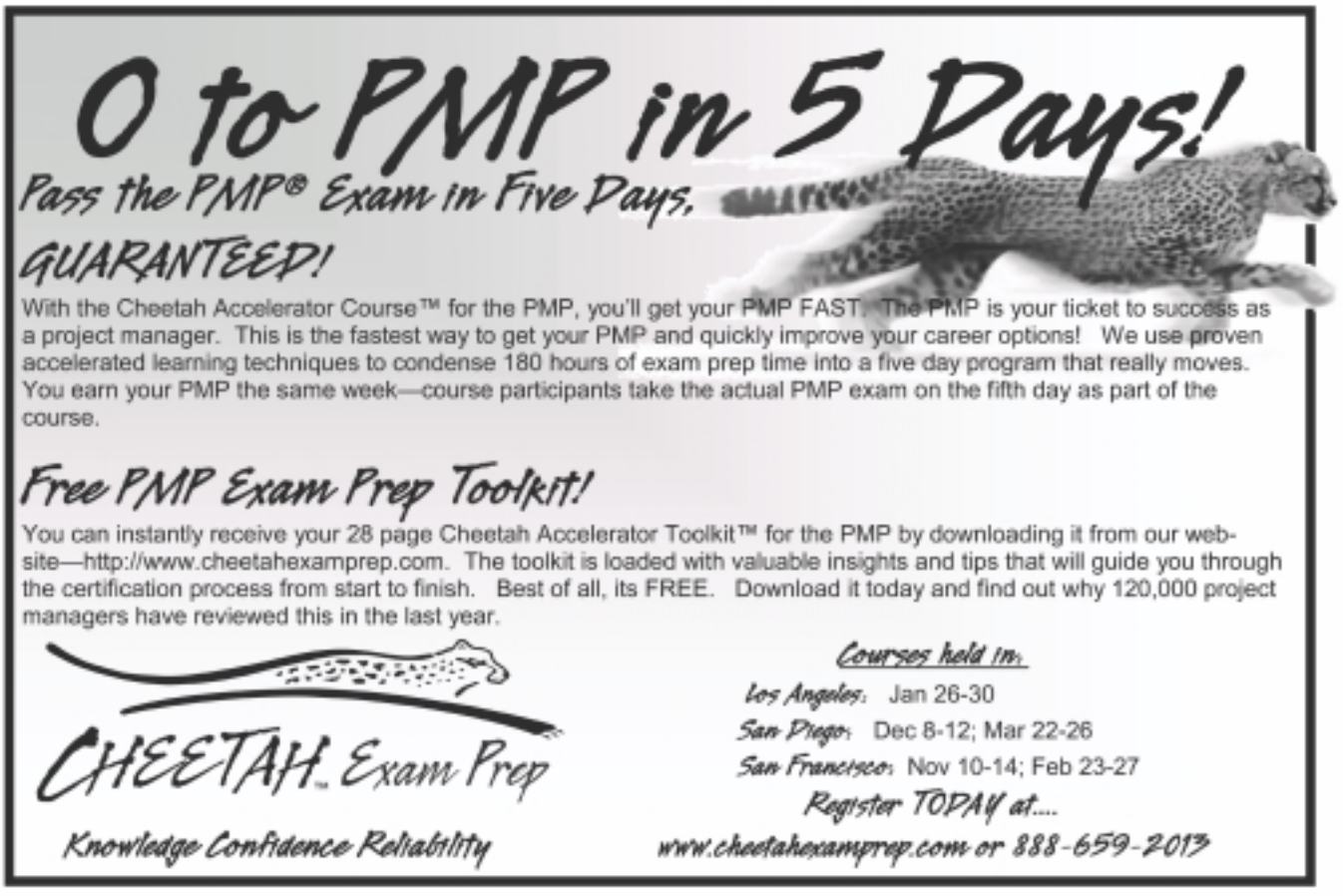
BOOK REVIEW

Quentin Fleming's latest book, Project Procurement Management: Contracting, Subcontracting, Teaming, is the definitive guidebook to the outsourcing of project work.

As the expert in this field, Fleming speaks clearly and simply about topics that many find complex and confusing. Few projects are undertaken that do not involve significant procurements. Project managers must, at a minimum, serve as contract administrators. Fleming equips us with the information we need to go the extra mile and ensure that the whole of the outsourcing process is carried out in ways that contribute to, rather than detract from, project success. His approach is systematic and thorough. The possibilities for unintended consequences are meticulously dissected and laid to rest.

Fleming has made good use of his experience in writing seven earlier books. Project Procurement Management is a triumph of clarity. I highly recommend a visit to www.pmibookstore.org and a search for "procurement management."

— Edward J. Fern, MS, PMP, NPDP



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Special Message #18

Dear Registered Education Provider,

PMI is seeking proposals from potential vendors to create, distribute and manage ancillary products and services based upon and derived from The Organizational Project Management Maturity Model (OPM3TM), a new PMI project management standard scheduled to be released in December 2003.

For more information regarding this request for proposal, please visit the OPM3 Area of the PMI Web site www.pmi.org/prod/groups/public/documents/info/pp_opm3rfp.asp This site has the RFP schedule, a listing of the OPM3 Ancillary Products and Services, and instructions for how to receive access to the OPM3 Request for Proposal.

Proposals must be submitted to PMI by email no later than 24th of November 2003 at 24:00 hrs EST USA (UTC/GMT -5). Please note that the RFP or the submission of a proposal does not represent in any way an offer to contract.

For general questions about OPM3, please email opm3info@pmi.org.

For questions about the RFP process, please email patti.harter@pmi.org.
Best regards,

Leslie A. Higham
Accreditation Programs Coordinator
Project Management Institute
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Phone: +1-610-356-4600, ext. 1109/ Fax:+1-610-356-4647
E-mail: leslie.higham@pmi.org
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PMI-OC Breakfast Meetings

PMI-Central OC Breakfast Roundtable

4th Tuesday of every month. November 29, 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

PMI-South OC Breakfast Club

3rd Friday of every month. November 21, 2003

Location: **Coco's - Lake Forrest and I-5**

Time: 7:15 - 8:45 a.m.

Register: Send your e-mail reservation to
Thomas Sippl at programs@pmi-oc.org

Cost: Self-paid breakfast

PMO-Local Interest Group

Breakfast Meeting

3rd Tuesday of every month. November 18, 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
Info@pmi-oc.org

Cost: Self-paid breakfast
Parking is validated

New Members (Cont.)

From page 2

Debra McClendon
Toyota Motor Sales

Chuck L. McVey
Volant Management Services

Mary K. Meland
Emulex Corporation

Deborah A. Moss

Lorraine Padilla
The Boeing Company

Maurice L. Polak

Daniel A. Porter
Raytheon

Michael R. Smith
Hanscomb Faithful & Gould

Debra L. Squicciarini
Cable and Wireless

Jim Wagner

Tom Wilhelm
Fluor Corporation

Eric T. Williams
Vanguard Managed Solutions

New Members 29
Total Members 1034

DINNER MEETING

Tuesday November 14th, 2003

Program: High Impact - Accelerated Learning used to Accelerate Projects

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	$40.00
Non-Members	$35.00	Non-Members	$40.00

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 9:00pm, Thursday, November 6, to obtain the "in advance" price. Reservations made after 9:00pm, Thursday, November 6, 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, November 9th after 9:00pm, will be invoice 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.

COMING NOVEMBER 11TH,

PMI-OC Career Network Center

PMI-OC is pleased to announce the November 11th launch of the Career Center on www.pmi-oc.org. The center will allow local employes and recruiters to share employment opportunities directly with PMI-OC members.

Join us at the November Dinner Meeting to learn more.

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 **programs@pmi-oc.org**

JOB POSTING TABLE

Share available employment opportunities with PMI-OC dinner meeting attendees. Submit your opening to Theresa Theiler, **tt1591@sbc.com.**

PMI Orange County MILESTONES
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Orange County Chapter, Inc.
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Irvine, CA 92623-5743

RETURN SERVICE REQUESTED

COMING EVENTS

November 11 – Dinner Meeting
High Impact - Accelerated Learning used to Accelerate Projects
Speaker: Michelle LaBrosse PMP, CEO
Vendor Showcase: Metafuse, Inc.

November 12 – Best Practices in Project Management with Harold Kerzner

November 18 – PMO-Local Interest Group (LIG) Breakfast Meeting

November 19 – Career Networking Evening ––"Karma Club"

November 21 – South Orange County Caffeine and Project Management Breakfast Club

November 25 – PMI-OC Board Meeting
E-Mail info@pmi-oc.org for meeting information

November 25 – Central OC Breakfast Roundtable

December 9 – Dinner Meeting
How to Manage Nerds
Speaker: Paul Glen
Vendor Showcase: Computer Associates

For details and registration information on all events for PMI-OC, see www.pmi-oc.org.