



JULY 2004
Volume 18
Number 7

ORANGE COUNTY CHAPTER

PMI-OC VISION

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JULY 13TH PMI-OC DINNER MEETING

The Hong Kong Disneyland Resort Project

By Frank Addeman

Hong Kong Disneyland will be the 11th Disney theme park worldwide. The HKDR project includes two themed hotels. It is located in Penny's Bay on Lantau Island and is on 78 million cubic meters of sand fill reclamation, 30 meters deep. A large portion of the facility design was performed in Hong Kong and includes over 20 different construction contract packages. At peak, there will be 3,500 construction workers on site.

The presentation includes key management control tools Disney is using to fast-track design and construction, maintain project integration, control progress, minimize monsoon season impact, and mitigate opening day delivery risks.

The presentation also addresses:

- How Monte Carlo risk assessments are used to identify and mitigate potential project delivery risks at Walt Disney Imagineering (WDI),
- How risk factors are developed and updated for theme parks and attractions from concept through delivery,
- How to ensure the project team understands the compounded impact of each risk factor, and
- Establishment of risk mitigation schedule milestones the team can achieve to reduce risk.

Frank Addeman will overview how WDI uses 4D scheduling to help all parties visualize installation interfaces and mitigate risk on the more complex attractions such as the Expedition Everest project as design definition evolves.

Continued on page 3

July Vendor Showcase:
PCI Global, Inc.
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INSIDE THIS ISSUE

Member Services	2
New PMP's	2
President's Column	2
New Members	4
Volunteer of the Month	5
Free Stuff	5
June Dinner Meeting Review	6
News from Headquarters	8
Advanced Topic Seminar	8
Integrating PMBOK® and RUT	9
Scholarship Available	9
Career Networking Group	11
Iron Chef Competition	12
PMP® Exam Questions	12
Around the Chapter	14
Breakfast Roundtable Review	14
Monthly Meetings	15
PMP® Exam Answers	15
At the June Meeting	15
Coming Events	16

SPECIAL MEETING NOTICE

The PMI-OC Board of Directors officially calls a special membership meeting in conjunction with the **August** monthly dinner meeting. All PMI-OC members are invited to attend.

Subject: Proposed Bylaw Amendments

Date/Time: Tuesday, August 10, at 6:15 p.m.

Location: Wyndham Orange County Airport

Agenda: PMI-OC members in attendance will be asked to vote via secret ballot on whether or not to approve the proposed bylaw amendments recommended by the PMI-OC Board of Directors.

Previous *Milestones* issues discussed the bylaw amendment process. This month's President's Column discusses details of the proposed bylaw amendments. Next month's *Milestones* will include a detailed change control list and a copy of the proposed bylaws. The change control list, proposed bylaws, and supporting board job descriptions will be posted on www.pmi-oc.org in July. An informational briefing will also be presented during the August special meeting.

Please contact PMI-OC President **Kristine Hayes Munson** at president@pmi-oc.org or VP Operations **Glen Fujimoto** at operations@pmi-oc.org for additional information.

Member Services

PMI-OC CAREER CENTER

Find your ideal project management job or find an experienced resource for your organization. For more information, see the **Career Center** on our website at www.pmi-oc.org/careers/ or contact the **Career Center** at careers@pmi-oc.org.

PMI-OC E-MAIL BLAST

Receive an e-mail reminder of all upcoming PMI-OC events.

Join the **PMI-OC E-Mail Blast** by sending an e-mail to join-blast@pmi-oc.org.

PMI-OC WEBSITE

Visit our website at www.pmi-oc.org. Make reservations for the dinner meetings, as well as other events, and stay informed of activities that are important to members and to the project management community.

PMI-OC LIBRARY

The PMI-OC Library is available at each monthly dinner meeting. PMI-OC members may check out the books for one month. Books should be returned at the next dinner meeting.

For more information about the PMI-OC Library, contact **Frank Parth** at professionaldevelopment@pmi-oc.org.

PMI-OC MILESTONES

PMI-OC members receive our monthly newsletter, *Milestones*, containing timely information on upcoming events, continuing education, volunteer activities and other announcements related to our chapter.

You can obtain a free copy of the next *Milestones* by sending your e-mail request to SampleMilestones@pmi-oc.org.

NEW PROJECT MANAGEMENT PROFESSIONALS

Michael Trimble	Elizabeth Mooney
Keith Lennox	William Majorossy
Charles Decker	Sue Tseng
Sung Pak	Joanne Pazdera
Sean Carroll	Total New PMP®s 10
David Troutt	Total PMP®s 486

THE PRESIDENT'S COLUMN



Proposed Bylaw Changes: Modified Board of Directors Structure

In previous columns I have shared the strategic reasons for changing the PMI-OC bylaws and the process used by the Governance Committee to revise the bylaws. Both this month and next month I'd like to spend some time discussing what the actual proposed bylaw changes are. That way you will be prepared to cast your vote at the special business meeting to be held in conjunction with the August dinner meeting.

Change Highlights

The major changes proposed are:

- Modified Board of Directors structure
- Reduced number of officers
- Addition of electronic election balloting
- Redefinition of quorum requirements for membership meetings
- Clarified conflict of interest requirements
- Expanded indemnification coverage

This month's column will discuss the modified board structure. Next month we'll talk about the remaining items.

Modified Board Structure

Personally, I believe the most significant changes in the bylaws focus around the modified board structure. The proposed structure is designed to increase strategic thinking while at the same time maintaining daily operations. The proposed structure is also intended to divide responsibilities in a similar fashion to best practices in Corporate America. On page 3, you will see two figures for you to compare the current and proposed board structures.

The number of board members remains constant at nine. You will notice that the majority of proposed board members are called "director" rather than "vice president." This shift more adequately expresses the board's role to set the strategic direction of PMI-OC.

Board members continue to be limited to serving only two terms in the same position. A term limit of six years of consecutive board service has also been proposed to ensure fresh ideas continue to be part of the chapter's governance.

The proposed specific areas of responsibility have also changed.

Chair/President. The role of Chair/President is one of two director positions whose role has not significantly changed. The Chair/President continues to provide overall leadership and direction to PMI-OC and to serve as the liaison between PMI-OC and PMI®.

Chair-Elect. This is a new position. The individual who is elected Chair-Elect commits to serving two years on the PMI-OC board. The first year he/she will serve as Chair-Elect, focusing both strategic and operational planning, as well as preparing to serve as Chair/President. The second year he/she will preside over the board as Chair/President, thus enabling more consistent leadership. If for some reason, the Chair/President resigns mid-term, the Chair-Elect will be appointed to complete the remaining portion of the term. Previously, the VP Operations was appointed to complete the remaining term.

Finance Director/Treasurer. The Finance Director/Treasurer continues to perform the duties of controller and manages PMI-OC finances. No significant changes to the responsibilities of this position are proposed.

Information Technology Director. This new position defines the strategic director for PMI-OC's technology infrastructure and oversees the implementation of programs to support that strategic direction. One of the issues PMI-OC currently struggles with is maintaining its technology, specifically its website and membership databases. Today the VP Communications oversees the website, and the VP Membership manages the membership databases. These individuals usually focus their efforts on defining the business requirements for each of these, rather than looking at how to improve the underlying technology. The Information Technology Director will oversee a more

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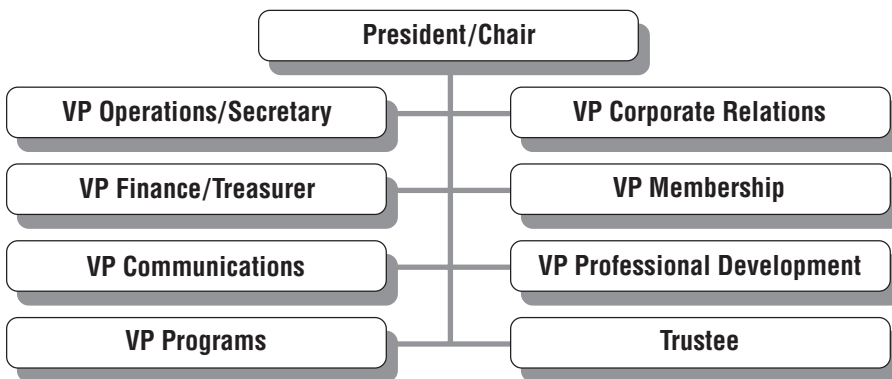


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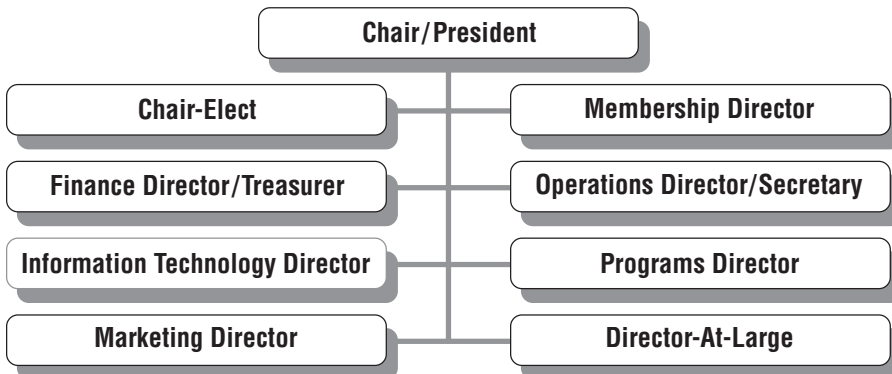
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Current PMI-OC Board Structure

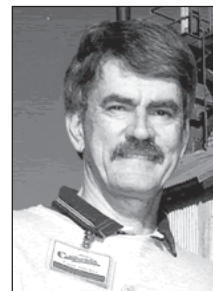


Proposed PMI-OC Board Structure



July 13 Dinner Meeting

Continued from page 1



Frank Addeman is the Vice President of Planning and Scheduling, Management Controls, for Walt Disney Imagineering (WDI). Frank joined WDI in 1988 as Manager of Finance. Frank became Manager of Project Planning/Scheduling in 1990 and

was the lead planner for multiple projects worldwide for WDI. Frank developed the WDI Project Process handbook in 1992. Prior to joining WDI, Frank spent 20 years in design engineering and construction with Bechtel and Fluor Corporation. His Bechtel experience included eight years as a project controls manager responsible for design and construction of several multi-billion dollar fast-track projects.

Frank has used Monte Carlo risk assessment to evaluate financial contingency and schedule risk over the last 25 years on a wide spectrum of major projects.

The President's Column

Continued from page 2

traditional IT team that focuses on ensuring the technology meets the business requirements defined by other directors.

Marketing Director. The proposed Marketing Director position is a combination of the current VP Corporate Relations position and the VP Communications position. This individual will set PMI-OC's marketing strategic direction. He/she will oversee internal communications via *Milestones*, the website, and e-mail blasts, as well as liaison with local businesses and educational institutions.

Membership Director. The proposed Membership Director responsibilities are based on the current VP Membership's role. He/she is responsible for membership tracking, retention, and recruitment. The Membership Director's responsibilities have been expanded to include management of PMI-OC's volunteer program. Previously, the VP Operations oversaw this program.

Operations Director/Secretary. The proposed Operations Director/Secretary is based in part on the current responsibilities of the VP Operations. This individual will be responsible for all chapter records, as well as managing the logistics of the PMI-OC board meeting.

Programs Director. The current VP Programs and VP Professional Development positions have been combined to form the Programs Director position, thus eliminating the current "gray area" which defines who is responsible for non-standard educational programs. The Programs Director will oversee educational programs, such as the monthly dinner meeting, PMP® exam preparation workshops, advanced topic seminars, career networking evenings, and one day seminars such as the upcoming Fifth Annual Vendor Showcase and Conference co-sponsored with the SCQAA and PMI-LA.

Director-At-Large. This new position replaces the current ill-defined trustee position. The Director-At-Large will be responsible for overseeing PMI-OC's strategic planning process and ensuring day-to-day operations align with PMI-OC's strategic plan. He/she will also ensure PMI-OC's strategic plan aligns with PMI's strategic plan.

Parting Thoughts

We, as a board, are excited about these changes because we believe these positions will help PMI-OC continue its long-term growth by promoting value to our key stakeholders, especially you. If you have any questions about these proposed changes, please contact me.

Don't forget to mark your calendar for the special meeting to be held in conjunction with the August dinner meeting to vote on these proposed changes.

Kristine A. Hayes Munson, PMP
President

WELCOME NEW MEMBERS

A recent technical issue at PMI® may have resulted in missing the announcement of our newest PMI-OC members. Here is a recap of our April and May new members.

Gary Beck
Allergan

Stacey Downing
ISG, LLC

Lori Garris
IBM

Cheryl Glavin

Mausam Mathur
Wisdom Infotech, Ltd.

Michael McKay
GKK Corporation

David Hood
Keller Graduate School

Chris Marshall

Dale Minney
Conexant

Thomas Burlison
Burlison Consulting

Jodi Williams
FileNet Corporation

Daniel Davisson
Conagra

Charles Decker
LAN International/
Clear Channel

Shrini Keskar
Larkspur Technology
Solutions, Inc.

Christopher Peduzzi
Option One Mortgage

Alberto Acevedo
E2 Consulting Engineers, Inc.

William Campbell
Risk Mitigation Associates

Tapas Das, PMP
PacifiCare Health Systems

Son Nguyen, PMP
CALTRANS

Javad Rahimzadeh, PMP
CA Dept. of Transportation

Jeff Wilson
The Boeing Company

Ishwar Bharbhari, PMP
Image Entertainment

Robert Chertoff
Workscape, Inc.

Pamela Crawford
Rockwell Collins

John Debnam
SiteLite

Roberto Oducado

David Tiberi
Parsons

Charles Czerny

Angelika Aswad
Allergan, Inc.

Parag Deshpande
TradePortal.com

Gary Atkinson
Northrop Grumman
Electronic Systems

Al Miner
Best Software, Inc.

Gordon Jones
SunGard Online
Investment Systems

Grant Morgan
Allergan, Inc.

Harry Nimon, PMP
Boeing Government Systems

Juzer Bannister

Angela Barrett
Automobile Club
of Southern California

Dana Bostrom
First Franklin Financial Corp.

Stephen Bach
Southern California Edison

Michelle Boucher
Kone, Inc.

Lori Maloof
Best Software

Joanne Loh
OneMind Connect, Inc.

Martin Pemberton

Ajay Sapre
Beech Street Corporation

Samuel Gonzalez
Motorola

Thomas Jolly
Co-Star Consulting Group

Alvin Maxwell
Toyota Financial Services

Sam Saucedo

David Leis
Honeywell

Steven Schock
CH2M Hill, Inc.

Gordon Scott
Automobile Club
of Southern California

Michael Belanger
QLogic Corp.

Steven Bosanski
Option One Mortgage Corp.

Kirsten Burner

Reynate Cabatbat

Sean Carroll, PMP
Biosense Webster, Inc.

Francis Cheung
Warner Bros. Entertainment

Frank DeMeo, PMP
Guidant Corporation

Pat Donthidi
Monarch Information and
Technological Services

Toni Dooley
Boeing

Deborah Duffy

Mariam Elqura

Nikhil Gandhi, PMP
SHURflo Pump Mfg. Co.

Berdy Gonzalez-Lubnau
TBC

Ronald Grabyan
Southern California Edison

Thomas Guntrip
Warner Bros.

Michael Haran
Experian

Sharmay Hu, PMP
Body Scan Imaging Center

Jeff Jay
Northrop Grumman
Mission Systems

Maria Jimenez
Prescription Solutions

Don Johnson
County of Orange

Douglas Lada
Nissan

Lora Lockwood, PMP

Martin Lopez
PacifiQ Systems, LLC

Michael Lubetkin
Epicor Software

Keith Massey, PMP
BearingPoint

Ronan Matthews

Paul Michelini
Toshiba America
Information Systems

Sung Pak, PMP
Biosense Webster

Lisa Pearce
Blizzard Entertainment

Callie Peterson
EMC Corporation

Bret Plemons
Diebold, Inc.

Barry Poudrier
Glowworks

James Ratzliff
Allergan

Shirley Sakaguchi
Southern California Edison

Lance Scott
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Robert Selcer
SBC Datacom, Inc.

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PC Training and Support, Inc.

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Conexant Systems

Megan Zhao Zhao
Cap Gemini

VOLUNTEER OF THE MONTH

Linda Bagwell Honored as Volunteer of the Month for June

A unanimous resolution was passed at the May 2004 board meeting of your chapter designating **Linda Bagwell** as **Volunteer of the Month for June 2004**. At the June 8 dinner meeting, PMI-OC President **Kristine Munson** made the announcement, but unfortunately, Linda was not able to attend to receive her Certificate of Appreciation.

Linda joined our chapter in August 2003, just before registering for the PMP® certification workshop, hosted and sponsored by PMI-OC. In October 2003, immediately following the conclusion of the workshop, she took and passed the PMP examination.

That singular defining moment inspired her to volunteer her support for future PMP workshops hosted by our chapter. Inspired by her PMP workshop experience, she developed a "PMP Instructor Orientation Guide." On two separate occasions, she presented the guide as part of the pre-workshop instructor orientation.

When other volunteers were unavailable, Linda stepped in to compile the results of student evaluations. As part of an ongoing "continuous improvement" process, she went on to chair a "sunset" review with participating instructors to ascertain lessons learned for the benefit of future workshops. Not being satisfied with her "backroom" volunteer duties, Linda taught/co-taught the framework portion for the last two workshops. Although she attended a volunteer opportunity meeting to see if there might be other areas where she could volunteer, she decided that supporting PMP training was the right niche for her in PMI-OC.

Linda has been a consultant for a number of years, focusing primarily on implementations and upgrades of PeopleSoft™ HCM and FMS. In her career, she has had several roles ranging from individual contributor to project manager. Linda perceives herself as both a business analyst and a project manager.

When asked what she likes about volunteering for PMI-OC, Linda responded, "It has been a pleasure to work with a group of professionals who are dedicated to assisting

others to further their careers by becoming PMPs. The selflessness and sincerity of instructors is admirable, and it has been wonderful watching colleagues stretch into teaching roles."

Dave Jacob

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MORE THAN THE CRITICAL PATH

Heed the Critical Constraints!



With his humorous and well-structured presentation, **Marty Wartenberg** took his audience on a most revealing and insightful journey. All of us PMs who have been arduously practicing critical-path project management discovered that the critical constraints on resources are even more crucial to bringing in a project successfully. Marty's views derive much of their justification from Eli Goldratt's seminal book on the *Theory of Constraints*. This theory sees organizations living or dying as systems, not as processes.

Thus, an organization's success or failure is a function of how well the different components of the underlying system work together. Systems are analogous to chains, or networks of chains. Logically, the performance of such systems is thus governed, that is constrained, by the chain's weakest link.

Project managers, by their very nature, are pragmatic folks. They do whatever works. So (1) how can they make use of the theory of constraints, and (2) why should they care?

A Little Philosophy

*"If you always do what you always did,
You always get what you always got.
If you don't want what you got,
Don't do what you did.
If you like what you got, do it again.*

Anonymous

For the first question, Marty had a straightforward answer: in your projects, look for limitations; ask, what are the constraints? Consider the simple widget-making process in Figure 1:

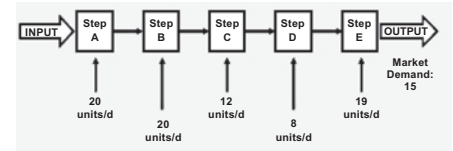


Figure 1

Determine how many units can be produced per day by performing the steps A through E. By inspection, the throughput of step D limits the overall production to 8 units/day. This step is a constraint on production.

In answering the second question, Marty reminded us that a large number of undesirable effects will be caused by a relatively small number of core drivers. Eliminating a very few core problems can result in a huge improvement. This is a very pragmatic context for why project managers should care. Not that Marty has always enjoyed smooth sailing as he spread his gospel. Far from it. Here's a taste of some of the objections he encountered:

- Big deal, we do all that anyway.
- It's just another name for regular project management.
- Critical path methods are good enough without this stuff (quote modified for good taste).
- If it had any value, PMI® would have included it in the 2000 PMBOK® Guide.
- A good project manager takes all the CCPM elements into account anyway.
- We can't force our companies to eliminate or reduce multi-tasking; it's a way of life.
- We can't put buffers in place; managers won't allow them.
- We can't put buffers in place, as the task managers would use up the time anyway.
- And on and on and on.

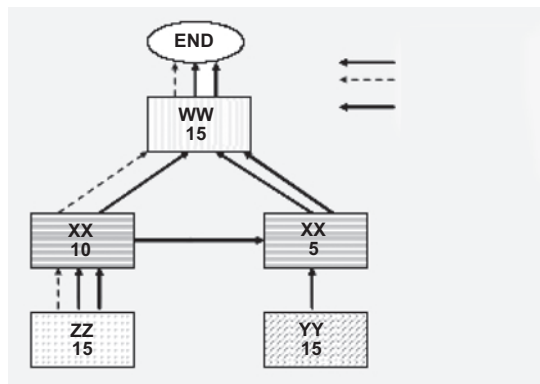


Figure 2: Because the resource XX appears in two parallel paths, it imposes a critical constraint. The project duration (45) is longer than the critical path (40).

"And much of this is true." That said, Marty proceeded to show how the theory of constraints relates to multi-tasking and the associated sharing of resources. To him, multi-tasking is not just a bad idea, it is evil. The sharing of resources leads to inefficiency, because the multi-tasked resources have to jump from task to task instead of delivering focused performance.

To get this point, consider the simple project in Figure 2. It uses resources labeled XX, YY, ZZ, and WW. The numbers below give the duration of their tasks.

Consider next the two projects, A and B, in Figure 3. Here both projects share the same resources. Hence they mutually constrain each other, and again the critical paths (40 for A, 30 for B) do not predict the actual completion of either project because of the shared resources

Obviously, both projects cannot utilize the same resource at the same time. They must prioritize them, and thus either project A or project B has priority.

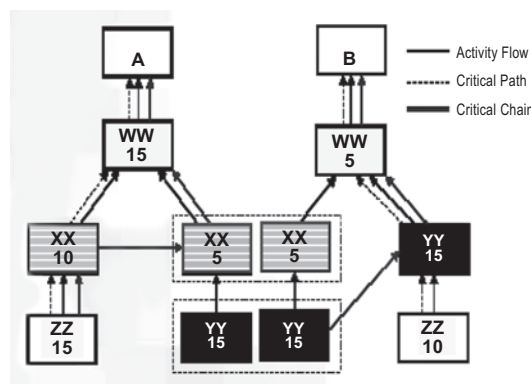


Figure 3: The project managers must communicate with each other and reconcile the conflicting use of shared resources.

Consider first the scenario in Figure 4 where project A has priority:

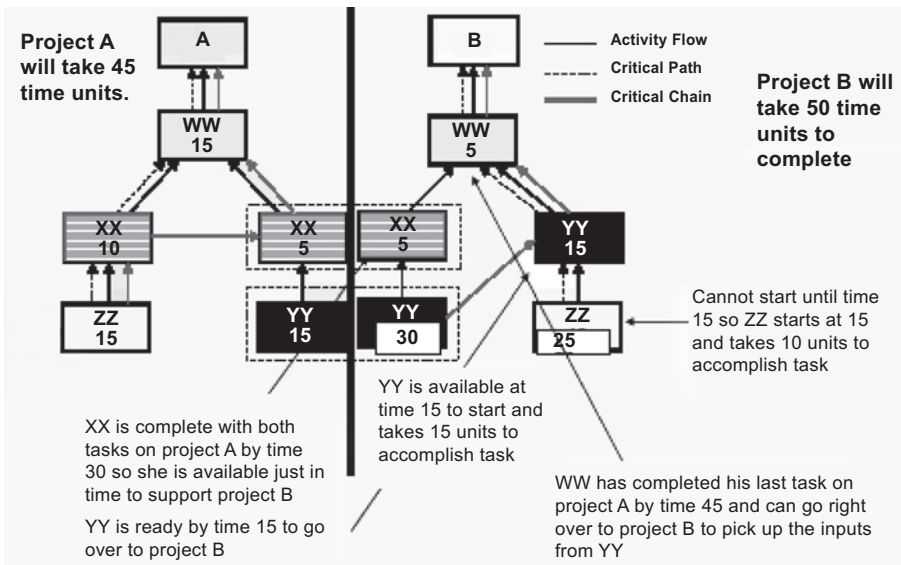


Figure 4: Project A has priority over project B. Its duration is 45, project B is extended to complete in 50.

Reversing the situation leads to the next scenario (figure not shown) in which project B takes priority over project A. Project B's duration is now only 35, and project A is extended to 65.

These scenarios have one crucial point in common: multi-tasking invariably extends the completion of tasks, and most often projects. This result is, however, not the only one. Because of their on-again, off-again engagements, the multi-tasked resources lose continuity, which leads to inefficiency and added set-up and suspend time. "Murphy" is not too far away either in such situations; unplanned disruptions propagate along a chain multi-tasked commitments that invariably lead to longer project completion times (see Figure 5).

Multi-tasking extends task/program completion

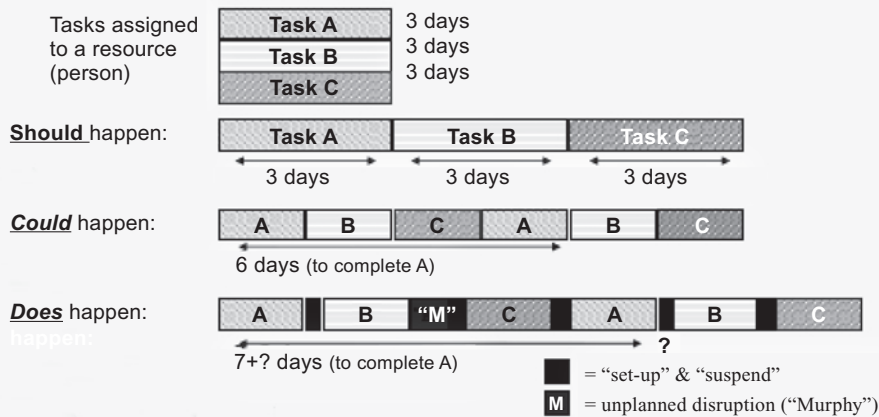


Figure 5: Multi-tasking of resources reduces efficiency, begs for Murphy to strike, and extends project completion.

Life is uncertain as it is, or stochastic, as Marty prefers. For this reason, he views a project as a collection of stochastic tasks (their cost and their duration are random variables) because very few tasks are ever really deterministic. For this reason, deterministic approaches to project management may not work in a stochastic setting. Thus, project management should take uncertainty into account and seek to minimize its effect and accommodate it.

Marty recommends bracketing the project duration and expenditures with bonuses for early completion and under-budget performance. He is also an advocate of project buffers (added in after the final project task), feeding buffers (where non-critical activities lead into critical ones), and resource buffers (before resources scheduled to work on critical activities).

For those of us who are in organizations where the concept of buffering will not work (management will reduce the project duration and will take the buffer away), we have the choice to violate the PMP® code of ethics. Marty advises renaming buffers into special tasks with names like *final integration*, *customer informal validation*, etc.

Moreover, Marty recommends that project managers negotiate to remove some safety from the individual tasks and move them to buffers. In this sense, project managers and their teams need to shift emphasis from assuring the achievement of tasks estimates and intermediate milestones to assuring the only date that really matters: the project's final end date.

Marty concluded with his key concepts:

- You must work with the project team to implement the approach.
- Absolute trust between the project manager and the team is essential; if it doesn't exist, don't bother trying any of this; it won't work!
- Depending on the organization, you may have to be stealthy about implementation.
- After achieving some success, unveil the methods and promulgate within the organization

Thank you, Marty, for a most stimulating and thought-provoking evening. You have given a new meaning to the job of bringing in a project on time.

George D. Meier, PMP
yorgo8@earthlink.net



Questions from PMI-OC President **Kristine Hayes Munson, PMP** and **Janice Preston, PMP**



News from Headquarters

New Online PDU Reporting Form

PMI® recently updated its online Professional Development Unit (PDU) reporting forms that make reporting your PDUs for Category 3 (Registered Education Provider) activities, such as PMI-OC meetings, easier to file.

Most information about Category 3 activities is pre-populated, such as program name/title and knowledge areas covered, from the information submitted by the R.E.P.s.

PMI-OC will begin submitting the dinner meeting and chapter special events programs to PMI so that the events will be posted for online reporting immediately following the event. There will be a transition period to ensure that all past events are on the site and to validate the turnaround approval time from PMI headquarters, so please bear with us during this time.

Some tips about the new online form:

- The form can be found on the www.pmi.org website (Professional Development and Careers—Certifications; Claim/View PDUs Online quick link)
- After selecting Category 3, type “Orange County” in the R.E.P. search field to find our chapter.
- The resulting list includes all of the PMI-OC events already filed with PMI by program number and program name. The list is in program number ascending order, so you should be able to reference the program number on your dinner/event receipts.
- The only fields you will need to populate are the date of the event, the number of PDUs earned, and whether the event met its objectives.

PMI still allows you to submit your PDUs through a printed hard copy form when necessary, but the new online form is easier to complete, so the chapter suggests this method whenever possible.

We apologize to our members for any inconveniences because we did not have a system in place to report PDUs in advance to PMI. But we are working closely with PMI to make sure that all of our events, including future and past events, are available at the PMI online database for our members to report PDUs.

If you have questions, see the PMI CCR reporting instructions on the PMI website or contact **Frank Parth**, VP Professional Development, at professionaldevelopment@pmi-oc.org.

ADVANCED TOPIC SEMINAR

An Introduction to Object Oriented Analysis and Design Using UML

The PMI-OC's Advanced Topics Seminar series reviewed Object Oriented Analysis and Design (OOAD) using Unified Modeling Language (UML) at UCI's Orange facility on April 24, 2004.

Craig D. Wilson with Matincor, Inc. reviewed and showed the benefits of OOAD for software development project management from the point view of a project manager. His presentation focused on the basics of the OOAD and the overview of the UML by providing a very clear introduction to concepts, terminology and techniques of OOAD. He emphasized it is not mandatory to have object oriented code writing experience to learn and to apply basic OOAD techniques to software development project life cycle. He explained the application of UML by non-complicated case studies.

Here are more details of the seminar content that Wilson discussed:

Object oriented technology is defined as a creation of a complex whole by simple parts. It is re-useable and has stability, reliability and integrity.

OOAD has been structured by objects, behaviors and responsibilities, classes, instantiation, and properties. Objects (real world and conceptual things) relate to simple parts; classes relate to groupings of objects which have responsibilities and behaviors. When objects interact with each other, they have relationship. Systems are defined by objects and their relationships.

The benefit of OOAD is to provide a uniform system design language for better team communication and participation and to support system development process as a design tool.

OOAD relates to software development processes by showing us *how*, while a process is telling us *who* does *what* and *when*. Its objective is:

- To identify the relevant objects in a problem,
- To drill down to relevant sub-objects with the appropriate level of detail,
- To find out relationships among objects to develop classes in an effective system architecture and
- To build the system.

As a visual modeling tool, UML translates our requirements into a system model which has component-like objects and classes. It is graphics-oriented and focuses on conceptualization.

UML also provides a structure for software development project management life cycle:

Use Case Diagrams relate to **Project/Scope Definition** and help to establish project boundaries and are used during presentations to upper management.

Use Cases relate to **Conceptual Design** and help to define and analyze the requirements. They are a basic level of class diagrams, text-oriented templates and are used by business analysts.

Sequence and Class Diagrams relate to **System Design**. Sequence diagrams are used to show the execution of the use cases. Class diagrams show relationship between classes, model the system architecture and are used by system analysts, architects, and testers during the physical design.

Deployment Diagrams relate to **Implementation**. These diagrams are used for the physical code level. Architects give work packages to code writers and use the diagrams to show relationship between physical system components like workstations, servers, embedded devices, etc., or in other words, to prepare the work packages.

All in all, Wilson's presentation provided a great introduction to a complicated subject in an easy-to-follow style.

We thank Craig Wilson for his time and for sharing his more than 20 years of experience in IT project management with our members, and for providing a basic knowledge for OOAD and UML to define and model a system. We also thank our members for their participation. For more information you can reach Wilson at craigdwilson@matincor.com.

Nuket Karagulle
Program Committee Volunteer
nuket.karagulle@verizon.net

BENEFITS OF INTEGRATING PMBOK® AND RUP

Project managers use the Project Management Body of Knowledge (PMBOK) as a guideline for the processes and tools necessary to manage projects. The PMBOK is a general discipline that can be used by a project manager in any industry. Within different industries, there are often methodologies used for the creation of the relevant products or services. In the field of software development, these methodologies are referred to as *software engineering methodologies*. One of the more popular software engineering methodologies used today is the Rational Unified Process (RUP). Both the PMBOK and RUP are targeted at executing a project that hits budget and schedule targets while delivering a product that satisfies the customer. Although the PMBOK and RUP have some similarities and overlap in process, they emphasize different aspects of the project and, as expected, the details of each methodology are quite different. At the highest level of abstraction, however, the essential difference could be captured as follows:

PMBOK is focused on *planning and controlling management activities with an eye to project control*, hence the emphasis on planning and change control.

RUP is focused on *planning and executing the work activities with an eye to effective product creation*, hence the emphasis on an iterative, phased approach.

Combining PMBOK with software engineering methodologies such as RUP can bring many benefits to the IT project manager. Here are some:

- **A defined approach or “track” for creating the project work schedule and deliverables.**

PMBOK provides a high-level, Initiation-Planning-Execution-Control-Closing outline for projects. This generic approach supports the key activities of most IT projects: “define, design, build, deploy.” RUP provides a specific approach with defined phases, iterations, deliverables, tools, and processes for creating the deliverables. RUP provides the details lacking in PMBOK that are necessary for IT projects. Still, RUP is a software-process *framework* in that each project is required to tailor, customize, and *implement* the RUP for its own unique circumstance. A RUP project manager is expected, therefore, to not only understand the framework detail, but also be able to instantiate from it a single, complete plan for the project at hand.

- **The relationship between the Work Breakdown Structure (WBS), which defines the product being developed and its sub-components, and the RUP deliverables required to support development of the product.**

The benefit to the project manager using RUP is that the work activities and deliverables are already described; they need only be aligned with the project’s WBS deliverables and then scheduled. In this way, more of the team’s effort is focused on *what* they are trying to accomplish rather than on *how* they are going to do their jobs.

- **Defined roles for project team members, including their responsibilities, interrelationships, and deliverables.**

PMBOK describes the roles, responsibilities, and deliverables of the project manager. RUP describes the same items for the software development team including analysts, designers, coders, testers, configuration management staff, etc. In a project combining PMBOK and RUP, the entire team is aware of their individual responsibilities and how the output of their work efforts contributes to the project, the product, and to the work efforts of other team members.

- **A common language between team roles that is integrated into the software engineering life cycle.**

RUP provides a common language and model set which is used during the entire project life cycle. It is both Use Case driven and architecture-centric. Use Cases define requirements, system/user interactions, and design models utilizing the Unified Modeling Language (UML). UML diagrams are used to convert the text-based Use Cases into system design models. A key design artifact is one or more models of software architecture, which later becomes the basis for coding, testing, deployment

and delivery of the final software product. These same artifacts are subsequently used throughout the project. As the project progresses, these artifacts evolve with greater degrees of detail and granularity. As they evolve, they become more “technical,” however, the basic syntax for communicating between the team members stays the same. One benefit of this is that it becomes easier for technical team members to present and discuss their designs with less technical members of the team, such as analysts, testers, and subject matter experts.

- **Defined, repeatable processes that are useful for tracking historical information.**

A further benefit to the use of software engineering processes for project managers is that they define structured, repeatable work processes. By tracking costs against these defined activities, it becomes easier for organizations to build historical databases of experience for future project estimations.

In our next article we will begin discussing the integration of RUP with specific PMBOK knowledge areas.

Craig D. Wilson

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Hadar Ziv, PhD

Professor of Information and Computer Science
University of California, Irvine
ziv@ics.uci.edu

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Project Management Scholarship Available

The PMI Orange County Chapter is offering a **\$1,000.00 Charles Lopinsky Memorial Scholarship**.

The scholarship is open to students who are Orange County residents and pursuing a degree in project management.

The deadline for all materials is Tuesday, August 31, 2004. To access the scholarship application and guidelines, please go to the PMI® Educational Foundation’s website at www.pmi.org/pmief and refer to the Scholarship dropdown.

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Rita Mulcahy, PMP



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CAREER NETWORKING GROUP

PMI-OC member **Rod Hendrixson** kicked off the June 16 Career Networking Group meeting by reminding the group of our website, www.pmi-oc.org, and that they can visit this site for job opportunities and information on monthly dinner, breakfast and other meetings.

This month's program was a panel of four recruiters (placement officers) with about 70 years experience. They lean toward IT, but also handle other areas. However, if they cannot help, they will refer a non-IT specialist to a recruiter in his/her area of interest. They shared with us how **they** see the world. The panelists included **Janice Davies**, Custom Resource Solutions, Inc., jdavies@crsorg.com; **Larry Singer**, We Staff IT, larry@westaffit.com; **Lee Pinkofsky**, RemX IT Staffing, leep@remxit.com; and **Melanie McCarthy**, webQA, mccarthy@socal.rr.com (moderator). The panel answered specific prepared questions as well as pointed questions from the group.

Out There: In general, the frantic mortgage hiring is tapering off, and defense is picking up. In general, VB, ASP, QA, security, 6 sigma, RUP and Sobanes/Oxley are the skills most in demand.

The panelists agreed your best bet is to take anything over nothing; employed people are more desirable. Remember 1999? Today a web developer gets \$45K; a dot net developer, \$70K; help desk is \$15-\$21/hr. A PM gets \$85-\$110 and a QA gets \$85+. The wheel turns.

Spend a little time on Monster and Dice to see the trends. Then pick three to four recruiters. The best way is word of mouth since recruiters get reputations very fast. A recruiter can handle only about 12 companies at any given time. Ask "Who are your clients; what industries; are you a tier one or tier two vendor; how do you stand out?" Work with them for years. Contact them every three to six months. Say "Hi," because in slow times they will remember you. Make friends with your recruiter. They are a key component of your job hunting network. Clients call recruiters on Friday afternoon when their people quit; call the recruiter on Monday.

When a recruiter refers you for an interview, ask him the color of the interviewer's eyes. That will tell you if there is a personal relationship or it is just a cattle call. Find out the corporate culture. Use PMI® and the recruiter to find who else was placed at the company. Melanie suggested that when she sends someone in, they have a 90% chance of success. Look sharp, always, even when picking up your written, signed job contract. Or else.

Where recruiters find clients and leads: They browse Monster and Dice for the industry trends. They do not consider ads for "confidential" companies worth while. They go to user groups and events such as PMI dinners. They arrive early and sit next to people working for companies. So should you.

Whether it's a big company or agency, get the number of the requisition and ask who the in-house recruiter for that requisition is. Recruiters don't waste their time. When you call the recruiter, give your name, tell how you are uniquely qualified, and give your e-mail address. E-mail your resume on the fifth day of the ad when the crush is less; fax or snail mail to really make an impression. If you are available immediately, say so; otherwise the recruiter may think you are fishing. Some companies flush their data bases every three months.

Cover Letter: Include a short, succinct cover letter. State how you are uniquely qualified.

References: You must have some real references. You can't give references that all say "Please contact HR." Remember that the recruiter's reputation is on the line. Think in those terms. You probably should not give references on the first phone call. That is too soon.

Resume: You must have a good resume. You will almost never submit the same resume twice because you will customize each resume to match the advertisement. Do it in MS Word. Have your executive summary say something like "IT program manager with experience implementing ERP, financial systems using web screens in the insurance and entertainment industries." Use a five or six bulleted summary at the top. Use active verbs like "thoroughly experienced in . . ." Be aware; companies hiring today want people who were doing "it" yesterday. They focus first on skill fit. Later they may

consider attitude and corporate fit. Be sure you have a cheat sheet of your top 15 accomplishments so you can customize your resume to each ad.

The panel members then each mentioned several reasonable sounding openings. We discussed the *OC Business Journal* "Book of Lists" as one place for you to get your target list of companies. Get a copy at the reference desk at any public library.

Two lucky attendees won gift certificates to Starbucks and Home Depot. Rod dismissed the meeting, and we had a very pleasant stand up, mingling networking session.

Rick Wolf, MS, PMP
(909) 858-9291
rw124c41@aol.com



Announcing open positions



Panel of recruiters



Lucky raffle winners, Rainer Klappert (left) and Dean Johnson (right)

ATTENTION System Developers



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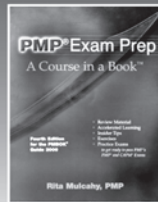
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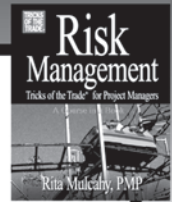
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Test Your Knowledge on PMP® Exam Questions

Here is a sample of some questions:

- The "To Complete Performance Index" (TCPI) determines all the following *except*:
 - The performance factor needed to stay within the budget (BAC)
 - The performance factor needed to stay within the estimate at completion (EAC)
 - The work remaining divided by the funds remaining
 - The difference between the earned value and actual cost
- At some point in a project using earned value metrics, the following data become available. The planned value (PV) = 1200, actual cost (AC) = 800, earned value (EV) = 1000:
 - This project is right on target. Everything is going according to the plan.
 - This project is producing more with less time and money than planned.
 - Cost performance is better than plan, but schedule performance is worse than plan. This project needs further scrutiny to determine if an activity on the critical path is contributing to the poor schedule performance.
 - There is insufficient data to make a judgment.
- An activity list has the following characteristic(s):
 - It is derived from the project schedule.
 - It defines all the project deliverables.
 - It should be organized as an extension to the work breakdown structure (WBS).
 - It is an output of a network diagram.
- All but one of the following is an output of Integrated Change Control:
 - Lessons learned
 - Project records
 - Project plan updates
 - Corrective action

Answers are on page 15

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Around the Chapter

VOLUNTEERS NEEDED!

Help! Help Me!! Need a volunteer to help me do the volunteer stuff for PMI® . . . three to four hours a month, max . . . It's glamorous!! . . . You get to meet movie stars, ride limos at least eight times a week, and live the life of luxury!!

If interested, please e-mail me at
behradpmi@aol.com

Need volunteers with artistic flair!! Looking for volunteers to help design a lapel pin for PMI's Education Foundation that will be used for fund raising at the PMI Global Congress in Anaheim this fall.

Please contact **Glen Fujimoto**
glenfujimoto@hotmail.com

Need volunteers who are interested in the new PMI Volunteer Recognition Committee to ensure all volunteer efforts and contributions are highlighted and recognized.

Please contact **Glen Fujimoto**
glenfujimoto@hotmail.com

Need a volunteer for sending out surveys, collecting, and analyzing results of all programs, including professional development. This would involve building surveys and sending them out to all attendees each time there is an event within PMI-OC. Requires two to four hours per month, depending on depth of analysis.

Please contact **Terry Ehrhard**
TEhrhard@firstam.com

Need six volunteers who can spend about five to ten hours per month working on PMI-OC membership retention issues. This involves meeting one or two times a month after work to discuss "what determines value for our membership," designing membership surveys, collecting feedback, analyzing, and documenting the results.

Please contact **Tom Cumming**
tcumming2000@yahoo.com

PMI-SOUTH OC BREAKFAST ROUNDTABLE

Resource Management

On May 21, the Laguna Hills edition of the PMI® Roundtable addressed a problem both common and systemic in the PM discipline: resource management in a matrix environment.

A PM, working in a software development organization, explained that he had difficulty obtaining accurate reports of hours spent on his project generated by his technical team because there was no link between the company accounting system and his PM resource management program. Thus, he could not keep track of hours devoted by each department, group, or individual to his project other than through a tedious and long manual process. Although the company has a number of project managers (who have the same problem?), there is no central PMO to address this kind of issue.

After further discussion and some reflection, we discovered that the stated problem was only the tip of the proverbial iceberg. Underlying the accounting difficulty was a series of issues related to how the PM obtains support from the various IT groups and how the demands of several projects are integrated into a workable plan.

Accountability seemed to be the salient issue defined during the discussion: the PM had lots, the resource manager, none. There was no accountable agreement between the PM and the resource manager other than to expend X hours on Y project. This really left the PM holding the bag (read- career threat). Further, the resource manager felt no compulsion to regulate the amount of work his group was tasked to do or to even engage in any sort of resource planning. He might not even know that he had more project demands than he could meet, and if he did know, that simply justified his request for more people which management (we surmised) was loath to provide.

The Roundtable identified several actions that might alleviate this problem. First, begin the dialogue with resource managers in terms of TASKS to be performed rather than hours to be expended. Obtain a verbal agreement (if the culture does not allow for a written sign-off) with the resource manager for task-hours-schedule. This provides a baseline for managing the task. Second, demand that the necessary changes be made to provide current hourly reporting by project. No doubt everyone needs this data, and it should be available. By gaining the support of the other PMs, the significance of this problem can be demonstrated to management and a "fix" implemented. Absent a centralized PMO, a grassroots approach is needed.

Unfortunately, the project must go on while these adjustments are put in place. The group suggested that current work can be supported by (a) developing close working relationships with the people actually doing the work, in effect going around the group manager to establish the importance of your project and the high energy level you demonstrate and (b) by conferring with other PMs to determine when resources might be stretched thin by project workload.

Perhaps other PMI members have some techniques for handling problems of this type. If so, please provide them to the website.

The PMI Roundtables have proven to be an effective way of obtaining valuable tips or complete solutions to PM problems from people who have been there and encountered that. Conversely, these sessions provide an opportunity for experienced PMs to help others succeed.

The South OC (Laguna Hills) Breakfast Roundtable meets at Coco's in Lake Forest on the third Friday of each month. The PMO-LIG version occurs on the third Tuesday at the Hilton Hotel on Bristol, and the Central OC group meets on the fourth Tuesday, also at the Hilton on Bristol. All are breakfast meetings starting at 7:30 a.m. Join us!

Fritz Mehrrens
Team Coach, Facilitator
South OC (Laguna Hills) PMI-RT
fjmehr@usa.net



PMI-OC DINNER MEETING

Tuesday, July 13, 2004

Program: **The Hong Kong Disneyland Resort Project**
By Frank Addeman

Location: **Wyndham Orange County Airport**
3350 Avenue of the Arts, Costa Mesa
Behind the O. C. Performing Arts Center

Time: 5:30 - 9:00 p.m.

Cost: **Dinner and Presentation**

<i>In Advance:</i>		<i>At the Door:</i>	
Members	\$25.00	Members	\$40.00
Non-Members	\$35.00	Non-Members	\$40.00

Presentation Only (Members and Non-Members)

<i>In Advance:</i>	\$10.00	<i>At the Door:</i>	\$15.00
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Please register at www.pmi-oc.org. You can pay by credit or bank card in advance or by cash/check at the door.

Make your reservation by 9:00 p.m., Sunday, July 11, to obtain the "in advance" price. Reservations made after 9:00 p.m., Sunday, July 11, will be charged the "at door" price.

Members and non-members who cancel their reservations after Sunday, July 11, or members and non-members who make a reservation and do not attend the meeting will not receive any refunds.

PMI-OC BREAKFAST MEETINGS

PMI-South OC Breakfast Roundtable

Friday, July 16, 2004

Third Friday of Every Month

Location: **Cocos**, Lake Forest and I-5

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

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

Cost: Self-paid breakfast

PMO-Local Interest Group (LIG) Breakfast Roundtable

Tuesday, July 20, 2004

Third Tuesday of Every Month

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

PMI-Central OC Breakfast Roundtable

Tuesday, July 27, 2004

Fourth Tuesday of Every Month

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

Answers to PMP® Exam Questions

From page 12

1. d. The difference between the earned value and actual cost

This is the cost variance (CV = EV - AC) and not TCPI. [Controlling] *Earned Value Project Management*, Fleming and Koppelman, 2nd Edition, Project Management Institute (pages 137-138).

2. c. Cost performance is better than plan, but schedule performance is worse than plan. This project needs further scrutiny to determine if an activity on the critical path is contributing to the poor schedule performance.

Cost variance:

(CV) = 1000 - 800 = +200 (under-run);

Schedule variance:

(SV) = 1000 - 1200 = -200 (behind schedule). Note: The "b" answer is only partially true, less money but not less time.

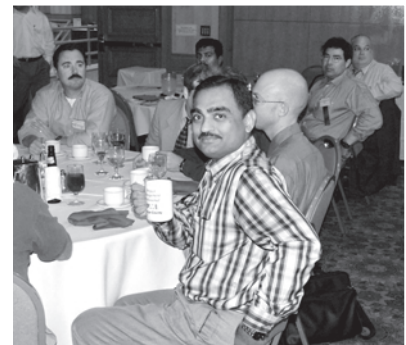
3. c. It should be organized as an extension to the work breakdown structure (WBS).

[Planning] PMBOK®, paragraph, 6.1.3.1, pg. 67

4. b. Project records

[Controlling] PMBOK, paragraph 4.3.3, pg. 49

At the June Meeting



Top: **Nikhil Gandhi**, PMP proudly displaying PMI-OC mug given to all new PMP®s.

Bottom: **Sujit Singh** and **Vic Torpunuri** from e2e Solutions, June vendor showcase.

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the chapter or the Project Management Institute. Subscription rate for non-members is \$15.00 per year for individuals with U.S. mailing addresses.

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PMI-OC, Inc.
Attn: **Diane Altwies, PMP**
editor@pmi-oc.org

COMING EVENTS

-  **JULY 13 DINNER MEETING**
The Hong Kong Disneyland Resort Project
Speaker: Frank Addeman
Vendor Showcase: PCI Global, Inc.
-  **JULY 16 BREAKFAST MEETING**
South Orange County Breakfast Roundtable
See page 15
-  **JULY 20 BREAKFAST MEETING**
PMO-Local Interest Group (LIG) Breakfast Roundtable
See page 15
-  **JULY 21 CAREER NETWORKING EVENING**
Career Transition and Certifications
-  **JULY 27 BREAKFAST MEETING**
Central Orange County Breakfast Roundtable
See page 15
-  **AUGUST 10 DINNER MEETING**
Business Process Management
Speaker: Rob Reti
Special Membership Meeting: Proposed Bylaw Changes
Vendor Showcase: PlanView, Inc.
-  **SEPTEMBER 15-18 ICSE & INCOSE 2004 CONFERENCE**
Synergy Between Systems Engineering and Project Management
Las Vegas, NV
-  **OCTOBER 21-23 PMI® LEADERSHIP MEETING**
Anaheim, CA

LEGEND

-  PMI-OC Event
-  PMI® Headquarters Event
-  PMI-OC Corporate Sponsor Event
-  PMI-OC Sponsored Event

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



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