



AUGUST 2004
Volume 18
Number 8

ORANGE COUNTY CHAPTER

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AUGUST 10TH PMI-OC DINNER MEETING

Business Process Management

By Rob Reti

A key issue that CEOs face is how their companies can build and sustain their lead over the competition. A key issue for CIOs is how to make it all happen, what IT's role must be in implementing those strategies.

A strong trend in business strategy formulation is to focus resources on what makes a company more competitive in the marketplace. The company identifies core competencies, "differentiators," or processes which cause customers to select them over the competition, then concentrates resources on optimizing those. The rest of their processes become candidates for efficiency initiatives or outsourcing.

IT strategy must be closely linked to changing business models. It supports virtually every process, so it must be able to respond rapidly. Some processes, like help desks, can be fully automated, becoming virtualized and easily changed thereafter. But transaction-processing applications that do the heavy lifting, even ERP packages, are seldom so agile.

Rob Reti, Principal, Strategic Services Group of Computer Sciences Corporation, and the designer of CSC's BPR (continuous improvement) methodology, will share insights and lessons learned in dealing with these issues in relation to business process management (BPM) or the third wave of reengineering.

He will put into perspective the many trends which have converged in this third wave; document management, workflow, business process reengineering; as well as the three BPMs (business process modeling, business process management, and business performance measurement), which are interrelated.

He will discuss the cutting edge tools already being used to design business process top-down in accordance with a company's strategy, unhindered by the constraints of existing IT systems: leveraging existing technology, yet achieving the agility that the business demands.

August Vendor Showcase:
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SPECIAL MEETING NOTICE

PMI-OC's 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.

This month's Milestones includes a detailed change control list and a copy of the proposed bylaws. The change control list, proposed bylaws, and supporting board job descriptions are also posted on www.pmi-oc.org. An informational briefing will also be presented during the August special meeting. Further information on specific bylaw changes and the change process can be found in previous Milestones.

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 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.

THE PRESIDENT'S COLUMN



Proposed Bylaw Changes, Part 2

PMI-OC will be celebrating its 15th birthday in October. We're planning a big birthday bash in October to celebrate past accomplishments. As a board, we recognize we must look to both PMI-OC's future and past. In August the PMI-OC membership will be positioning the chapter for future successes by voting on the proposed bylaw changes.

Please come and participate in August's special membership meeting. Even if you cannot stay for dinner, **come and cast your vote on whether or not to approve the proposed bylaw changes on Tuesday, August 10**. On behalf of the board, I encourage you to approve these changes.

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

Last month's column discussed in detail the modified board structure. This month we'll quickly discuss the other changes.

Reduced Number of Officers

Currently every member of the PMI-OC Board is also an officer. In other words, nine individuals can enter into legal obligations on behalf of the chapter. Officers have the right to act individually whereas directors must act as a group. Limiting the number of officers will increase organizational control and accountability. The proposed bylaws limit the number of officers to the legally required three

- **President:** Commits to legal agreements. Position held by Chair.
- **Treasurer:** Maintains financial records, including bank accounts. Position held by Finance Director.
- **Secretary:** Creates and maintains organizational records such as board minutes. Position held by Operations Director.

Addition of Electronic Balloting

As the PMI-OC membership continues to grow, we face the challenge of maximizing the number of individuals participating in board and special elections. We want to encourage more PMI-OC members to cast their ballots by using electronic balloting.

Electronic balloting will augment the in-person and snail mail voting options defined in the current bylaws. Many PMI® components, and PMI itself, effectively use this tool to enfranchise members. It is my hope that the board will implement the electronic voting option in 2005.

Redefinition of Quorum Requirements for Membership Meetings

The quorum requirement changes are also a direct result of the ongoing membership growth. The larger the organization grows, the harder it becomes to gather a certain specified number of members together to form a quorum for membership meetings.

The proposed bylaws redefine the quorum for annual membership meetings and special meetings the same way the PMI bylaws do. The new definition does not include a specific numeric attendance target. Rather it specifies a quorum can be formed no matter how many are in attendance, as long as a minimum of 30 days' notice is given for meetings.

Clarified Conflict of Interest Requirements

The board is very concerned about conflict of interest. We carefully look at the new events, vendors, and sponsorship activities to ensure that we avoid conflict of interest. Based on these numerous discussions, the board felt that the current bylaw conflict of

Continued on page 4



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- Project Manager



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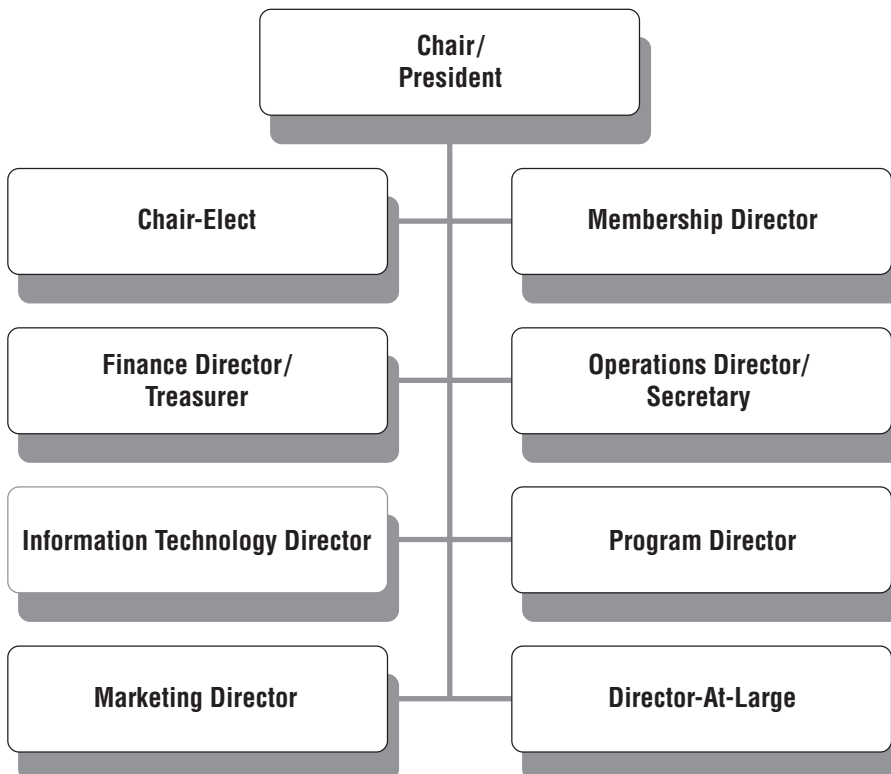


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Proposed PMI-OC Board Structure



Nominating Committee Opens Search for Candidates

Do you see room for improvement in PMI-OC and want to help?

OR

Do you like what's going on now and want to get involved?

The Nominating Committee has opened its search for candidates for the 2005 Board of Directors. Director and officer positions will be determined based on whether or not the proposed bylaws changes are approved by the membership at the August special meeting.

We will be evaluating all candidate recommendations and preparing a slate of candidates to stand for election in the fall. If you're interested, please contact **Janice Preston** at jypreston@vistaperformance.com.

The President's Column

Continued from page 2

interest definition left too many gray areas. We turned to PMI for advice.

PMI recommended we use the text from their sample component bylaws. This text provides clear guidelines on when and how PMI-OC can engage in contracts or transactions with any organization in which PMI-OC's directors, officers, appointed committee members, or authorized representatives are employed or have a financial interest.

Expanded Indemnification Coverage

Webster's defines "indemnify" as "to secure against hurt, loss, or damage." The last thing the board wants is for any PMI-OC volunteer to experience some sort of harm because they choose to donate their time and talents. Both the number of individual volunteers and the level of responsibility exercised by volunteers will increase as a result of the modified board structure. The proposed bylaws expand indemnity of any officer, director, committee member, or authorized representative of PMI-OC. Again we used text in this section from PMI's recommend bylaws.

Proposed Bylaws and Change Summary in Milestones

I'm sure you noticed this month's *Milestones* is a little thicker than normal. Inserted you will find complete text of the proposed bylaw changes and a detailed summary sheet on this page and the next. Please take a few moments to read the bylaws yourself. Don't hesitate to direct any questions you might to either me or any other board member.

Please come and vote at the August special membership meeting!

Kristine A. Hayes Munson, PMP
President

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 are 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.

Sponsored by the PMI Orange County Chapter, www.pmi-oc.org.

SUMMARY OF PROPOSED PMI-OC BYLAW CHANGES

This document summarizes the proposed changes recommended by the PMI-OC Board of Directors to the Project Management Institute, Orange County Chapter, Inc. (PMI-OC) bylaws. The recommended changes have been reviewed by PMI and external legal counsel retained by PMI-OC. For additional information, please contact **Kristine A. Hayes Munson, PMP**, PMI-OC President at president@pmi-oc.org.

Overall Changes

Reordered Articles IV and V in order to define the legally required Officers first and then the Board of Directors. This structure parallels the recommended sample component bylaws developed by PMI. Updated reference numbers appropriately throughout the document.

Article II. Purpose, Charter, and Scope of Activities

2.2.c. Added California after Orange County to further clarify the geographic area served by PMI-OC.

Article III. Members

- 3.3. Broke one sentence into two to enhance overall readability. The new text reads: "There shall be only one class of Member. All Members are voting Members." The previous text read: "The term "Member" refers only to a voting Member, there being only one class of Members."
- 3.7. Enumerated existing sentences into points a and b to improve referenceability. Added phrase to "in PMI-OC" to clarify the organization from which a member may choose to resign.

Article IV. Officers (Formerly labeled Article V)

- 4.1. Limited the number of Officers to three which are President, Treasurer, and Secretary to tighten controls on who is authorized to perform legal action (i.e. sign a contract) on behalf of the chapter. Defined which Board of Director shall serve as an Officer:
- Chair shall be President
 - Finance Director shall be Treasurer
 - Operations Director shall be Secretary
- Previously all Board of Director members also served as officers. Moved the director responsibility statements to Article V.
- 4.1. Edited to support change to only three Officers.

Article V. Board of Directors (Formerly labeled Article IV)

- 5.1. Restructured the Board of Directors to run the chapter more like a business with a strategically-focused, rather than tactical, Board. Changed the titles and position descriptions of the Board of Director members to support the new structure. Each Board member, except the Chair and Chair-Elect, will be called a "Director" rather than a "Vice President."
- The **Chair** shall perform all acts required or authorized by PMI-OC Bylaws and shall have such other powers and duties as may be assigned by the Board. The Chair shall ensure compliance with the PMI-OC bylaws.
 - The **Chair-Elect** shall oversee the strategic planning process and assist the Chair.
 - The **Finance Director** shall oversee the management of funds for duly authorized purposes of PMI-OC.
 - The **Information Technology Director** shall oversee the technology infrastructure used in the operation of PMI-OC.
 - The **Marketing Director** shall be responsible for internal and external PMI-OC marketing.

Continued on page 5

- The **Membership Director** shall be responsible for tracking growth and retention of members and volunteers.
- The **Operations Director** shall keep the records of all proceedings, actions, and business meetings of PMI-OC and the Board.
- The **Program Director** shall develop and coordinate programs for PMI-OC.
- The **Director-at-Large** shall make recommendations for future direction of PMI-OC.

5.2.b., 5.2.c., and 5.2.d.

Modified election process to support new Board structure and to ensure continuity of Board leadership. The Chair-Elect shall serve a one-year term as Chair-Elect and automatically, without membership vote, serve a one-year term as Chair. The membership will only vote for the Chair position if the Chair-Elect position is either vacant or is held by appointment. In the election for the 2005 Board of Directors, we will assume the Chair-Elect position is vacant and ask the membership to elect both a Chair and Chair-Elect.

- 5.2.e. Instituted a six (6) year cap on consecutive years of Board service to encourage a diverse leadership pool within PMI-OC. This cap parallels the cap on placed on PMI Board members.
- 5.2.f. Clarified the definition of two (2) consecutive terms means two (2) consecutive years. Thus Directors appointed to fill mid-term vacancies are only eligible to serve one additional term in the same position regardless of when the appointment occurred.
- 5.5. Updated to whom a Board member may resign based on new Board structure.
- 5.6.b. Mandated that a Director must be removed from the Board if that individual ceases to be a member of PMI or PMI-OC because membership in both organizations is required for Board service. Previously removal for failing to be a member of both organizations was optional.
- 5.7. Updated the succession plan to support the new Board structure so that the Chair-Elect succeeds the Chair if the Chair does not complete their term.

Article VI. Nominations and Elections

- 6.1. Edited text to reflect new Director titles and Officer limitation. No procedural changes were made.
- 6.2.b. Included the option of conducting an election using electronic balloting.
- 6.2.c. Renamed "tellers" to "Teller Committee" to reflect current PMI-OC committee structure.
- 6.2.d. Changed "office" to "position" to support Officer limitation.

Article VII. Meetings of the Membership

- 7.1. Included the option of conducting an election using electronic balloting.
- 7.3. Edited text to emphasize that the Officer specifically responsible for calling special meetings is the President. Preserved ability of Board or membership to call a special meeting as well.
- 7.4. Edited text to emphasize that an Officer, specifically the President, is responsible for initiating legal action on behalf of the chapter.
- 7.6. Redefined a quorum for annual membership meetings and special meetings to parallel the definition used in the PMI bylaws in order to support our constantly growing membership base. Previously, not less than five percent of the total membership needed to be present.

Article VIII. Inurement and Conflict of Interest

- 8.1 Added the phrase "except as otherwise provided in these Bylaws."
- 8.3 Inserted new requirements for PMI-OC to engage in contracts and transactions with any other organization in which PMI-OC's directors, officers, appointed

committee members or authorized representatives are employed or have a financial interest. These requirements were copied mostly "as is" from the sample component bylaws developed by PMI. Additional text came from PMI-OC's external legal review which clarifies that a determination must be made that PMI-OC could not have obtained a more advantageous arrangement with reasonable effort under the circumstances.

Article IX. Indemnification

- 9.1. Expanded the indemnification of directors to cover any person who is or was an officer, director, committee member, or authorized PMI-OC representative. This text was copied mostly "as is" from the sample component bylaws developed by PMI. Additional modifications came from PMI-OC's external legal review.
- 9.2. Added text copied "as is" from the sample component bylaws developed by PMI to further clarify indemnification.
- 9.3. Clarified insurance coverage by using text copied "as is" from the sample component bylaws developed by PMI to further clarify indemnification.

Article X. Amendments

- 10.2. Included the option of conducting an election using electronic balloting.

Article XII. Records

- 12.1. Relocated text requiring retention of Articles of Incorporation and PMI-OC bylaw copies to section 12.3.
- 12.2.d. Added text recommended by PMI-OC's external legal review to specify the informational requirements for an annual financial report.
- 12.2.f. Added text recommended by PMI-OC's external legal review that defines the process for membership review of the annual financial report.
- 12.3 Created a new section to define other records to be retained by PMI-OC. Section includes text requiring retention of Articles of Incorporation and PMI-OC bylaw copies previously found in section 12.1. Added requirement to retain membership records.

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HONG KONG DISNEYLAND RESORT PROJECT

and Walt Disney Imagineering 4D Scheduling Applications

July 13, 2004 Presentation by Frank Addeman



Those of us in who are project managers in IT or other disciplines have learned so much from the experiences of the project managers who design and build the Space Mountains and Fantasylands. PMI® and PMBOK® owe a lot to the engineering and construction world.

Frank Addeman is Vice President; Planning and Scheduling, Management Controls; for Walt Disney Imagineering. Frank had 20 years of design engineering, construction, and project controls management experience with Fluor and Bechtel prior to joining Disney. Frank has adapted many of the project controls tools used to manage large power and industrial projects at Bechtel to manage themed design and construction at Disney. He has been involved with WDI domestic and international projects for the past 16 years.

Frank provided an overview (mind-blowing to me) of the planning, scheduling and tracking of a project that spans five years, involves a wide spectrum of show/ride components and interfaces with vendors around the globe. At its peak, over 4,000 workers will be on site. Government interfaces, local culture, monsoons, and SARS all play a part in the Hong Kong Disneyland Resort Project currently under construction on Lantau Island.

How **DO** they do it?

Frank shared the main goals and objectives of the program:

- **Maximize the guest experience.** Using local market research, WDI determines the best regional attraction mix. Is Buzz Lightyear a better fit than Snow White? Is live entertainment more important than thrill rides? Do you provide fast food or sit-down restaurants? Guest expectations and requirements drive decisions about what features will be included in the project.
- **Leverage and train local Hong Kong design and construction talent.** Hong Kong is a city of glass and steel; Disneyland's themes include Victorian building designs and old town U.S.A. Main Street architecture. There is a learning curve for local artisans who are selected to construct the trademark Disneyland buildings and area development.
- **Study Hong Kong code/design requirements and construction building methods.** Design must conform to local construction practices, i.e., structural steel vs. concrete buildings. The recently constructed Hong Kong airport provided many lessons learned for construction planning on Lantau Island.
- **Weather** plays a big part in planning. Major portions of area development and exterior finishes had to be scheduled for the dry seasons. The plan called for most underground utilities and critical foundations to be completed before the summer of 2003 monsoon season, where winds can exceed 100 mph, and torrential rains can wash away progress.
- **Perform detail facility design using Hong Kong design firms.** Lessons learned on other WDI projects are to complete design details and lock down design with experienced WDI designers before engaging local design firms for the detail design.
- **Produce quality design documents to optimize construction efficiency.** The overall theme park was partitioned into 22 "zones." Construction plans were based on the zones and were phased. The high risk, complicated construction was prioritized first. This helped optimize construction durations and sequencing, stage interfaces, and plan resources. By phasing construction bid packages, companies that did not win initial contracts had a second chance to bid subsequent packages.
- **Implement strong design progress management controls to maintain performance/progress visibility.** Earned value reports are used to monitor design and construction progress. Monte Carlo risk assessments were done for key schedule risk areas, and risk mitigation plans put in place as required. Delivery risk was communicated with

the Hong Kong government as the project progressed.

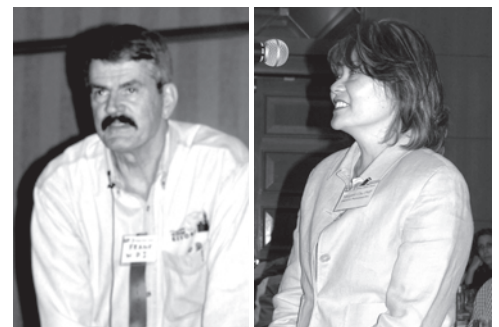
- **WDI uses 4D scheduling** to mitigate scheduling risks on many of their projects. This powerful tool is shared with the construction contractors to plan and sequence their work and track actual progress against the plan. Frank presented an overview of current applications on Disney's Animal Kingdom Expedition Everest project.
- **The onset of SARS in 2003** presented an unexpected risk to the schedule. Designers and project team members from different parts of the globe could not travel as expected to work on the project. Technology was put in place to implement video-conferencing design reviews and project coordination meetings.
- **WDI used Japanese/Chinese joint ventures to supplement local theme construction experience.** The Tokyo DisneySeas project success provided many Japanese companies with valuable regional experience that WDI wanted to leverage in Hong Kong. This project has provided an opportunity for Japanese contractors to supplement themed construction experience. Local Hong Kong companies gain the experience to build to Disney standards.

Frank was asked what some of his biggest schedule challenges have been. He indicated that countries with different cultures have different commitments to schedule delivery. When preparing a schedule, it is critical to address the risks working with different cultures.

From my perspective as a project manager and consultant in IT, Frank's message matches my (small scale) experience:

Maximize the guest experience. Get end user requirements; be careful and do this right, or the project will fail on delivery.

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Frank Addeman answers questions from Margaret Chu, PMP.

Hong Kong Disneyland Resort Project

Continued from page 7

Leverage and train local design and construction talent. Understand the strengths of team members; be sure to give them the training they need to do their jobs.

Study code/design requirements and construction building methods. Study and plan the architecture and standards; understand constraints, security requirements, etc.

Perform detail facility design using experts and locals. Use experts for detailed design; give developers some freedom to implement while following the standards.

Produce quality design documents to optimize construction efficiency. Have clear and agreed to requirements and detailed designs up front, so costly changes are minimized.

Implement strong design progress management controls to maintain schedule. Project control processes have to be followed to maintain a schedule and deliver a quality product.

Attract Japanese/Chinese joint ventures to supplement local theme construction experience. Partnering with experts is valuable.

Weather and SARS. Risks management is a key part of project management.

*Barbara Ansell, PMP
BAansell@conxinc.com*

VOLUNTEER OF THE MONTH

George Stephens Honored as Volunteer of the Month for July

A resolution was unanimously passed at the June 2004 board meeting of your chapter designating **George Stephens** as **Volunteer of the Month for July**. Chapter Volunteer Coordinator, **Behrad Fardi**, honored George at our July 2004 general meeting by presenting him with a Certificate of Appreciation.

George joined PMI-OC in March 2003. He immediately became acclimated to the spirit of volunteerism and took on the job of student coordinator for the Fall 2003 PMP Prep Class. As coordinator, he tracked and recorded updates to the course material, distributed and collected instructor evaluations, set up and transported the chapter's audio/visual equipment, provided refreshments, made hot water, did windows, and consumed all leftovers, including two dozen Krispy Kreme donuts, forty individual servings of cream cheese, and one gallon of apple cider. *A great testimonial to the fringe benefits of volunteering for the chapter!*

During the prep class, George substituted for the chapter librarian, updated the library records, and helped with special chapter events. After the conclusion of the PMP prep class, he continued as the permanent chapter librarian until last month. His crowning achievement as the chapter librarian was successfully locating ten of the missing thirty-five copies of Rita Mulchay's PMP Exam Prep books. He then quickly checked them out to challenge the next librarian to get them back.

Being a true-blue chapter member, he always encourages dinner attendees to add a PMI-OC shirt to their wardrobe. On inquiring about his aspirations to become a PMP, he has committed himself to taking the exam before this coming fall.

George is an IT project manager at a mortgage company in Orange County. In his spare time, he manages a company that develops software products for the transportation industry. His career aspirations are to encourage others to grow, achieve their potential, enjoy the journey, and have fun doing it. "I want to feel that I always tried to make a positive difference and succeeded."

When asked what he likes about volunteering for PMI-OC, George responded, "You always get more back than you give. I volunteered my time and got back recognition, encouragement, friendship, and knowledge." Congratulations, George!

Dave Jacob

CAREER NETWORKING GROUP ▸ WEDNESDAY, AUGUST 18, 2004 KARMA CLUB

Join us for a highly interactive networking and lead sharing session. Use your 30 second commercial to introduce yourself, 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 is 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.

Bring your business cards, and come prepared to network and exchange information with others looking for new opportunities in project management.

When: Wednesday, August 18, 2004, 6:00 p.m. – 9:00 p.m.
Registration and food start at 6:00 p.m. Program starts at 6:30 p.m.

Where: 40 Plus of Orange County, 2040 South Santa Cruz, Suite 245, Anaheim, CA 92805, 714-938-0161

Cost: \$5.00 PMI-OC members / \$5.00 non-members (Covers food and soft drinks.)

Register: www.pmi-oc.org

Questions? E-mail: professionaldevelopment@pmi-oc.org

CAREER NETWORKING GROUP

On the evening of July 21, 2004, PMI-OC member **Rod Hendrixson** kicked off the July Career Networking Group meeting. This month's program was a discussion of certification and consulting. Approximately 28 people attended.

Susan Thompson started out by making a very important point. Certification is expensive and time-consuming. Re-certification is more of the same. A lot of certifications are developed just to sell you classes; however, certifications can make you stand out in the job hunting process. The bottom line: **Do your research, and be sure the certification will benefit you before you spend the time and money.**

Susan discussed the QAI (Software Quality) Certifications. There are three certificates:

1. Certified Software Quality Assurance (CSQA) for PMs, BAs, etc.
2. Certified Software Quality Tester (CSTE) for test managers, testers, etc.
3. Certified Software Project Manager (CSPM)

All three require character references from managers who have known you for at least six months. The price is \$300 to \$400. The website is www.qaiuse.com.

Our second presenter was **Frank Parth**, parth@projectauditors.com, a PMP®, a trainer/consultant, and a member of the PMI® certification committee. Frank assists in developing the *PMBOK® Guide*, "the dullest book ever written." A PMP certificate is worth about \$8,000 per year (as of year 2000, and on the average). There are now about 130,000 PMPs worldwide and 75,000 in the U.S. If you have a degree, you must prove 4,500 hours of project management experience, as opposed to 7,500 hours with no degree. You re-certify every three years with 60 PDUs (professional development units).

The training all starts with the *PMBOK® Guide* and the *Code of Professional Responsibility* from PMI. You can learn the material, test yourself online until you've "got it" (\$100), or take UCI, UCSD, or private classes for about \$550.

The test is online at a testing center and very easy to do. The exam takes four hours, and the passing rate is 137 correct out of 200, or 69 percent.

Starting in November 2004, you will need to show an additional 35 hours of contact time, and you may have to have a **sponsor**. **A word to the wise, apply NOW.**

Our next speaker, **Aldo Fucinari**, aldo1@coxnet, is an experienced Six Sigma black belt. Six Sigma is a methodology, a technique, and mathematics for bringing a project closer and closer to perfection.

Six Sigma applies to any process, including products and services. It encourages schedule predictability. For instance, a project was estimated for X amount of time and came in at 3X. After training on Six Sigma, a similar project came in at .75X. The Six Sigma process trains you to break work down into smallest component elements, which leads to predictability in scheduling, a faster project and less bugs.

Six Sigma starts with the customer requirements. It tends to identify low or no value processes and eliminate them. The value delivered is the customer's idea of value, not the designer's. One point of contact is the Six Sigma Institute. The source of software certification is www.asq.org. Another source of information is <http://eng-ed.ucsd.edu>. Cost is \$200 to \$400 per belt.

Our final speaker, **Bill Mooney**, William Mooney Associates, www.consultantcoach.com, discussed becoming consultants. Our first thought was that PMPs are mostly W-2 employees. However, he pointed out that a PMP in healthcare could consult as a security advisor, project manager, security trainer, security executive search agency, chief security officer (for rent), advisor on retainer, hot line, expert witness/ litigation expert, security speaker/writer, and security seminars and workshops expert.



Susan Thompson

Frank Parth, PMP



Aldo Fucinari

Bill Mooney

We discussed the fact that today's consultant is less of a salesman and more of a known problem solver. Bill presented the phases necessary to become successful:

- **Phase 1. Research the playing field.** Decide what **you** add to company value; develop the contacts and **trust**. Decide what opportunities exist. Develop a three year vision (updateable), and think of consulting as "change management."
- **Phase 2. Position Yourself.**
- **Phase 3. Promotion.** Seek referrals, speaking opportunities, writing, participation in organizations, etc.
- **Phase 4. Intersections.** Become a client magnet; network.
- **Phase 5. Contact to Contract.** Develop trust, collect information about clients, and use a marketing strategy.
- **Phase 6. Providing the Work.** Diagnose, design, deliver and debrief. Create a delighted client.
- **Phase 7. Collect the Money.**
- **Phase 8. Be Profitable.** Charge one-third for contractors, one-third for overhead and one-third for profit.
- **Phase 9. The Business Plan.** Use it more to focus yourself than to get financing. Explain how you will get new/repeat business.

Needless to say, Bill teaches "How To Build and Maintain A Profitable Consulting Practice."

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
rw124c41@aol.com



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Test Your Knowledge on PMP® Exam Questions

Answers are on page 15

Here is a sample of some questions:

1. At what point in the project life cycle would stakeholders have the most ability to influence the final characteristics of the project's product?
 - a. Development
 - b. Implementation
 - c. Concept
 - d. Close out
2. Which of these statements is a good characterization of a work breakdown structure?
 - a. It is a deliverable-oriented grouping of project elements.
 - b. It describes work to be assigned to organizational units.
 - c. It defines the chart of accounts.
 - d. It is created after budgets and schedules have been developed.
3. A make-or-buy analysis should be performed:
 - a. When the project charter is issued
 - b. During Solicitation Planning
 - c. Before the scope statement is developed
 - d. During Procurement Planning
4. Of the five processes groups that define the life cycle of a project or phase, the two groups whose outputs are inputs to each other are:
 - a. Planning and Executing
 - b. Planning and Controlling
 - c. Initiation and Planning
 - d. Executing and Controlling



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ENRICHING LIVES

through Project Management Education

Most PMI® members view project management as a profession, or, at least, as a means to earn a living. But most of us have benefited in other ways too. Project management is a rare profession that provides not just a means to earn a living, but a better way to organize almost every aspect of our lives. The principles of project management apply not just to construction and software development, but also to home improvement, weddings, vacations, and high school homework assignments.

It is the recognition of project management's inherent ability to improve lives and communities that drives the PMI Educational Foundation. The foundation was established in 1990 to "promote economic, educational, cultural, and social advancement through the application, development, and promotion of project management concepts, theories, and life skills." It continues to focus on enriching "lives through knowledge and education of project management life skills."

Although the foundation is an autonomous organization, it was established by PMI and continues to enjoy a very close relationship with PMI and many of its chapters and SIGs. Many chapters and SIGs make a formal donation to the foundation each year. Others are involved through the participation of their members, supporting the foundation through membership on the board of directors or one of its project teams, or simply by making a donation when they renew their PMI membership.

However, many members of PMI-OC are unfamiliar with the foundation and are asking for more information. Others recognize the way project management has enriched their own lives, and find themselves in passionate support of the foundation's mission and objectives. They are asking how they can get involved. Here are several places to start.

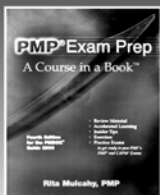
1. *PMI Today*: watch for a series of articles starting in July describing the foundation and its activities.
2. *Milestones*: watch for additional articles in this space describing PMI-OC's activities in support of the foundation.
3. Our PMI Educational Foundation liaison: VP Operations **Glen Fujimoto**.
4. Check the foundation's website: <http://www.pmi.org/pmief>.

In the meantime, your financial contributions can be put to work immediately. If you are renewing your PMI membership, you will have an opportunity to make a donation, and we urge you do so. Alternatively, you can make a contribution at any time via check or credit card payable to the PMI Educational Foundation, Four Campus Boulevard, Newtown Square, PA 19073-3299 USA. The foundation's website (<http://www.pmi.org/pmief/donation.htm>) provides other convenient ways to get involved in this important work.

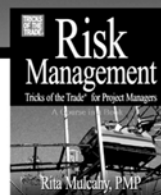
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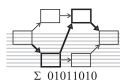


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Volunteers Needed

Major thanks to all of you who volunteer!

1. Need a volunteer to help as **Assistant E-mail Blast Coordinator**. *E-mail Blast* is the chapter's weekly "upcoming events" bulletin that we all receive, and we need a backup resource.

Please contact **Cornelius Fichtner** for more information.

cornelius.fichtner@cox.net

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

Please contact **Glen Fujimoto**.

glenfujimoto@hotmail.com

3. **Special Event Volunteers**. Five volunteers needed to plan and run a **new PMI-OC event**: all-day project management and development competition scheduled for end of summer.

- Work with VPs of Corporate Relations and Programs on event scope and details,
- Market the event,
- Prepare, design, and procure competition materials,
- Coordinate competition registrants and other participants, and
- Ensure location readiness.

Please contact **Victoria Flanagan**.

veflanagan@yahoo.com

4. **Logoware Coordinator**. One volunteer needed to expand and manage chapter logoware.

- Propose and procure new logoware,
- Recommend logoware pricing,
- Manage logoware inventory,
- Promote logoware to PMI-OC community at events, via e-mail, and via website,
- Recruit additional volunteers as needed,
- Reports to VP of Corporate Relations.

Please contact **Victoria Flanagan**.

veflanagan@yahoo.com

5. **Advertising Assistant**. One volunteer needed to support advertising activities.

- Help create communications to sponsors,
- Create and manage sponsor invoices,
- Enhance and administer sponsor database, and
- Assist Advertising Chair as needed.

Please contact **Victoria Flanagan**.

veflanagan@yahoo.com Thanks,

Behrad Fardi
Volunteer Coordinator

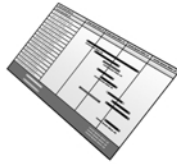
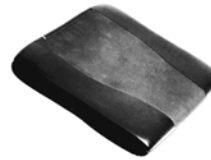
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San Diego: Sept 13-17

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Resignation of Frank Parth

VP Professional Development

The Board of Directors regrettably informs the PMI Orange County Chapter that **Frank Parth**, VP Professional Development, has submitted his resignation from the board due to his increasing professional workload.

Frank has provided his time and experience to help guide the both Programs and Professional Development over the past few years and has worked hard to provide benefits to the members through existing programs, such as dinner meeting presentations, as well as new ventures, such as the advanced topic seminars and breakfast meetings.

We wish Frank continued success in his professional endeavors.

The board will continue to manage the existing Professional Development duties until a successor is appointed.

Thank you,
Glen Fujimoto
VP Operations

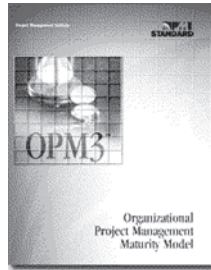
PMI News from Headquarters

Standards update project seeks volunteers.

PMI® recently initiated a project to update the *Government Extension to a Guide to the Project Management Body of Knowledge (PMBOK® Guide)*. The project is being led by **Peter Dimov, PMP** and offers a number of opportunities for volunteer involvement.

More information is available in the standards section of www.pmi.org. (kristin.wright@pmi.org).

Exciting volunteer opportunity: OPM3® Second Edition Project seeks project manager.



Are you a good leader? Do you have a keen interest in advancing the project management profession? And would you enjoy the challenge of collaborating with project management professionals from all corners of the world? Then this volunteer opportunity is for you!

PMI published the *Organizational Project Management Maturity Model (OPM3)* in December 2003. Following PMI Standards' refresh cycle, PMI will start a project to update *OPM3* in January 2005.

Currently, PMI is accepting applications for the leadership position of *OPM3* Second Edition Project Manager. If you are interested and believe you can effectively lead the development of a virtual standards development project, contact **Lisa Kruszewski** by e-mail at lisa.kruszewski@pmi.org, or by telephone at +1-610-356 4600, ext. 1033, to get more information regarding the position description and PMI's requirements for its standards development project managers.

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Web: extension.uci.edu/accelpm

SU04-41JUN

PMI-OC DINNER MEETING

Tuesday, August 10, 2004

Program: **Business Process Management** by Rob Reti
Special Membership Meeting: Proposed Bylaw Changes

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 |
|--------------------|---------|---------------------|---------|

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, August 8, to obtain the "in advance" price. Reservations made after 9:00 p.m., Sunday, August 8, 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 their reservations after Sunday, August 8, or members and non-members who make a reservation and do not attend the meeting will not receive any refunds.

PMI-OC BREAKFAST MEETINGS

PMO-Local Interest Group (LIG) Breakfast Roundtable

Tuesday, August 17, 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-South OC Breakfast Roundtable

Friday, August 20, 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

PMI-Central OC Breakfast Roundtable

Tuesday, August 24, 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 10

- 1. c. Concept**
PMBOK®, paragraph 2.1.2., pg. 12
- 2. a. It is a deliverable-oriented grouping of project elements.**
[Planning] PMBOK®, paragraph 5.3.3.1, pg. 59
- 3. d. During Procurement Planning**
Make-or-buy analysis is a tool and technique in the Procurement Planning process.
[Planning] PMBOK®, paragraph 12.1.2.1, pg. 150
- 4. d. Executing and Controlling**
PMBOK®, paragraph 3.2 and Figure 3-1, pgs. 30-31

At the July Meeting



Top to bottom:
Brenda Ingham, RMC Technologies,
Michael Moore, PMP, Technicolor,
Terry Ehrhard, PMI-OC VP Programs, and
Kristine A. Munson, PMP, PMI-OC President

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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Jane Flynn
jane-flynn@earthlink.net

Printing: **Sir Speedy, Long Beach, CA**

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

COMING EVENTS



AUGUST 10 DINNER MEETING

Business Process Management

Speaker: Rob Reti

Special Membership Meeting: Proposed Bylaw Changes

Vendor Showcase: PlanView, Inc.



AUGUST 17 BREAKFAST MEETING

PMO-Local Interest Group (LIG) Breakfast Roundtable

See page 15



AUGUST 18 CAREER NETWORKING EVENING

Karma Club



AUGUST 20 BREAKFAST MEETING

South Orange County Breakfast Roundtable

See page 15



AUGUST 24 BREAKFAST MEETING

Central Orange County Breakfast Roundtable

See page 15



AUGUST 28 ADVANCED TOPIC SEMINAR

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