



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

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

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DECEMBER 13TH PMI-OC DINNER MEETING

Medicare: As Simple as ABC and D

By Robert "Bo" Kehrer, PMP

If you believe what you hear in the media, more people understand rocket science than fathom the intricacies of the new Medicare Modernization Act (MMA). But, despite undergoing the most sweeping changes in its 40 year history, Medicare is basically as easy to understand as ABC . . . and now D.

Bo Kehrer will present his unique perspective based on his 30 plus years in the health insurance field, having served as both a technology and business leader, and recently as the manager of a start-up PMO. The Medicare program has been around as a government entitlement program for quite some time and is going through some major changes next year.

Bo will present a brief history of the Medicare program and the changes that will impact us all in the coming years. So, if you are currently retired, know someone who is retired or if you are planning to retire someday yourself, you should be able to learn something. In addition, Bo will describe how PacifiCare and Prescription Solutions have utilized a formal PMO approach in support of their health care products and their market leadership position in the Medicare and Pharmacy Benefit Management areas. Bo will present key success factors and potential pitfalls of the PMO approach which should provide insights to PMO leaders and professional project managers in health care and other fields.

Bo Kehrer is currently the manager of the Project Management Office (PMO) for Prescription Solutions, a wholly owned subsidiary of PacifiCare Health Systems, providing Pharmacy Benefit Management (PBM) services to more than five million plan members.

He brought leadership and direction to the implementation of a formal project development methodology and has grown the PMO staff to over 20 project managers and business analysts who understand system development, project management and the business.

The PMO has successfully completed over 30 major projects in the first year and a half. Bo is a native of Columbus, Ohio and graduated from Ohio State University with B.A. in Economics and Statistics. He has completed Life Office Management Association (LOMA) and Health Insurance Association of America (HIAA) training. He served on LOMA insurance industry administration and systems committees for over ten years. He is also an active member of the Project Management Institute.



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Spark of Love

We are supporting the Orange County Fire Department's toy collection drive again this Christmas season.

Bring an unwrapped toy worth \$10.00 or more to the December dinner meeting and receive an extra raffle ticket for the evening's event. See page 4.



NEW PMPS

Scott Newman
Irfan Ghafoor
Jessica Kenwood
Linda Kay Lerch

Total New PMPs 4
Total PMI-OC PMPs 889

NEW MEMBERS

Grant Aldrich
Leadtank, Inc.
Greg Anascavage
Gregory Applewhite
Computer Sciences Corporation
Todd Banhidy
ISP
Douglas Barnard
Datastream Systems, Inc.
David Bobrow
Perot Systems
David Cavena
Sony Pictures Entertainment
Dinesh Chinthala
David Colby
Joseph Devoy
URS Corporation
Christina Do
IBM
Bradley Dybel
Laguna Geosciences, Inc.
Tabitha Edmonds
Sharon Fraser
Experian
Gregory French
Southern California Edison
James Gibson
IncorTech, LLC
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UBOC
Parin Kothari
Brown Consulting
Gary Lawrence
Avail
Christy Lewis
Dan Lyle
Imperial Capital Bank
Sharyn Lyons
Kathleen Matlock
Matlock Consulting Services
William McCann
James Patrick McGowan
IBM
Vivek Nambiar
Raja Natarajan
Kevin Owens
Acquity Group
Ozlem Paget
Neena Patel
Global Enterprise Solutions, LLC
Tanja Peterson
Towers Perrin

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THE CHAIR'S COLUMN



Thank You

It's been two years since I started writing this column to share my experiences as PMI-OC Chair with you. This is my twenty-fourth column, number 24, and my last. I've been struggling with what to say to conclude this series and to put my feelings of gratitude into words.

In preparation for writing the column, I spent some time rereading previous ones. I found myself amazed at how much we've accomplished together over the past two years. In my opinion, our most significant achievements over the past two years are:

- Continuing to build a friendly, professional environment where members can network and gain new career-enhancing skills.
- Offering innovative programming, especially the **Greg Balestero** dinner meeting, PMInAction, the new member welcome program, and an expanding number of PMP® exam preparation workshops.
- Establishing the PMI-OC Fellow program to recognize those who have taught each of us so much.
- Revising the PMI-OC bylaws to restructure the board of directors and enable electronic balloting.

Reading between the lines in those previous columns, I can see myself changing as an individual over time. I am only beginning to discover how this experience will impact me as a leader and as a person. I recognize that serving as chair has been a seminal experience in my life, augmented by my participation in the PMI® Leadership Institute Class of 2005. I appreciate your willingness to share my journey as I learned to choose leadership and accept feedback as a gift. So many of you helped me along the way by sharing personal nuggets from your journeys, which I captured in my leadership learning journal.

I feel privileged with having had the opportunity to work with so many of you who choose to volunteer. I appreciate the gift of your time to publish the *Milestones*, run the dinner meetings, arrange speakers for the advanced topic seminars, ensure the website is up to date, register PDUs with PMI, arrange for companies to sponsor events, sell logowear, greet first timers, instruct future PMPs . . . This list continues endlessly.

I appreciate those of you who only have time to participate by attending events. I look forward to seeing you at each PMI-OC event. Your insights and questions always help me think about project management in a new and different way. I also appreciate the support from those who are unable to actively participate in PMI-OC at the present time.

Finally, I am especially grateful to the 2004 and 2005 PMI-OC Boards of Directors. Each director patiently taught me while giving countless hours to help make PMI-OC a better project management community. I look forward to serving my last year on the board in 2006 and working with the new chair, **Glen Fujimoto**.

Thank you for allowing me to learn through serving you. I wish you all the best as you continue on your personal journeys.

Kristine A. Hayes Munson, PMP

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PMI-OC BROCHURE DESIGN PROJECT

PMI-OC is proud to announce the completion of new marketing collateral designed by students at The Art Institute of California-Orange County (AiCAOC). This school accepts Community Arts Resource Exchange (CARE) projects to give students “real-life training” and opportunities to apply their talents for the betterment of the community. AiCAOC donated its professional graphic design services via the CARE Program.

The new marketing collateral (brochure) promotes PMI-OC with a colorful and professional appearance. The brochure achieves the chapter’s goal of attracting and informing professionals who will benefit from membership in PMI-OC, as well as providing additional benefits to our organization.

PMI-OC would like to acknowledge and thank the chapter volunteers and team members from The Art Institute who made this project possible.

Rodney Hendrixson, PMP, Membership Director; **Victoria Flanagan**, Director at Large (project sponsor); **Diane Altwies, PMP**, Marketing Director; and **Tammy Hawkins**, Ambassador, provided project management and input for the finished product.

At the November dinner meeting, PMI-OC recognized the AiCAOC faculty and the winning student team members for successfully completing the PMI-OC Brochure Design Project.

Four teams of graphic design students submitted a total of nine design concepts for the chapter’s selection. The winning team consisted of **Andy Benudiz**, project manager; **Crystal Adams**, project lead; **Jeff Smith**; **Lisa Roddy**, and **Santiago Garcia**. The final design selection process wasn’t easy; all of the submissions were exceptional.



Left to right: **Victoria Flanagan**, PMI-OC Director at Large (project sponsor); **Jeff Smith**, AiCAOC student graphic designer; **Kimberly Jones**, AiCAOC Public Relations Specialist; **Crystal Mitchell**, AiCAOC Assistant Academic Director of the Graphic Design Program; **Lisa Roddy**, AiCAOC student graphic designer; **Rodney Hendrixson, PMP**, PMI-OC Membership Director; **Crystal Adams**, AiCAOC student graphic designer (project lead); and **Andy Benudiz**, AiCAOC student graphic designer (project manager)
 Not in photo: **Santiago Garcia**, AiCAOC student graphic designer; **Herb Proske**, AiCAOC graphic design instructor; **Melinda Lester**, AiCAOC Academic Director of the Graphic Design Program; **Diane Altwies, PMP**, PMI-OC Marketing Director; and **Tammy Hawkins**, PMI-OC Ambassador

The new brochure and other collateral will be available in early 2006, as we deplete our current stock of marketing materials.

Linda Keller, PMP



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Spark of Love

PMI-OC is supporting the Orange County Fire Department's **Spark of Love** toy collection drive again this year. We are planning to have members of the Orange County Fire Department at the December dinner meeting to accept toys for boys and girls of all ages.

Bring an unwrapped toy worth \$10.00 or more to the dinner meeting and double your chances at our **huge** raffle. We're going to see if we can get Santa Claus to show up early by handing out many **cool** prizes. All toys received will be donated to the Fire Department to be given to less fortunate children during this Christmas season.

The Spark of Love program is administered by the Orange County Fire Department. This is a long running program that has a meaningful impact on our community. Please consider participating as a way to share with the less fortunate among us.

VOLUNTEER OF THE MONTH Francis Amalraj, PMP Honored



A resolution was unanimously passed at the October 2005 board meeting of your chapter designating **Francis Amalraj, PMP** as the **Volunteer of the Month for November 2005**.

Chapter Volunteer Coordinator **Brent Felsted, PMP** honored Francis at our October dinner meeting by presenting him with a Certificate of Appreciation.

Francis recently served as Election Committee Chair, seamlessly coordinating PMI-OC's first electronic balloting.

Congratulations, Francis!



NOVEMBER MEETING REVIEW

A Study of Transformational and Transactional Leadership and the Effect on Project Manager Turnover Intention

Presented by William Epstein, Ed.D., PMP

You may recall getting an *E-mail Blast* from PMI-OC requesting your participation in an online survey. The survey dealt with how you felt about your job, your intention to stay in your current job, and asked many questions about your managers. **William Epstein** used these survey results, together with extensive research, as input to his doctoral thesis. The results of the survey and Dr. Epstein's thesis were the subject of the November dinner meeting presentation.

Dr. Epstein proposes that there is a relationship between employee turnover intentions and their respective supervisor's style of leadership. Employee turnover is costly. "The direct cost of employee turnover can run between 50 percent to 500 percent of an employee's annual salary." A project manager has a unique role in an organization, and it can be especially costly to replace the PM. Add to this the indirect cost in terms of decreased morale, diminished customer satisfaction, and lost corporate knowledge, and you will understand why this topic covers critical information for an organization.

First some definitions:

Turnover intention includes two parts: thoughts of quitting and intentions to leave, which at some critical point can lead to a project manager actually quitting. Dr. Epstein described several theories about why people leave jobs, with his thesis and presentation focusing on the impact of leadership styles.

Dr. Epstein described in detail the Bass and Avolio (1990) Transformational Leadership Model, which has two individual threads: transformational leadership and transactional leadership.

Transformational leadership has four distinct dimensions:

- **Idealized influence.** We trust the leader and look up to him/her as a role model. Think of the Pope, or Marsha Evans, head of the American Red Cross.
- **Inspirational motivation.** The leader who is able to communicate a vision that we can relate to. Think of John F. Kennedy or Martin Luther King.
- **Intellectual stimulation.** The creative leader, the one who makes us think and keeps us engaged with creativity. Think of Thomas Edison or Albert Einstein.
- **Individualized consideration.** The leader who is concerned with our well-being, professional growth, and job satisfaction. Think of Herb Kelleher, leader of the fun-loving Southwest Airlines.

Transactional leadership has two distinct dimensions:

- **Contingent reward.** We know this as Management By Objectives (MBO), popularized by Peter Drucker. Meet your objectives; get your reward.
- **Management by exception.** Leadership that monitors staff performance, looking for mistakes. This could be active (anticipating mistakes) or passive (waiting until a mistake has occurred) and then takes corrective action. Think of Dilbert's pointy haired boss.

Dr. Epstein showed the results of his statistical analysis of the PMI-OC survey results' data and interpreted the significance. Bottom line: "The study's results indicate that subordinates prefer supervisors whose leadership styles are perceived as transformational." Project managers are less likely to think about leaving a job when



their leaders are effective transformational managers. There was also a positive result for the leadership style that defines clear objectives and clear rewards (contingent rewards).

Dr. Epstein summed up his findings by recommending that project management turnover can be decreased by leaders who apply the following principles:

- Be a champion of the organization's vision by making employees feel engaged and excited about the future.
- Be direct and open when communicating to each PM what's expected of him/her.
- Provide work that is challenging and interesting.
- Provide management support in which the supervisor is a barrier buster, not a barrier blocker, when executing the project objectives.
- Make employees feel valued by providing individual time to discuss future career growth and development opportunities.

He states that, "... project manager turnover intentions can be reduced by project leadership selecting managers who utilize transformational leadership behaviors and by implementing training and development programs that would be focused on improving these same behaviors for all project leadership."

Thank you, William! We are very proud that our fellow chapter member and PMP® has achieved Ed.D. status!

Barbara Ansell, PMP



Dr. William Epstein listens to questions and comments from November dinner meeting attendees.

AT THE NOVEMBER MEETING



Above, clockwise: Networking before the meeting; Tom **Cutting**, **PMP** accepts compliments on his article, "The End of Fairy Tale Beginnings," recently published in "Computerworld;" two attendees avidly discussing a project management issue; project managers sharing a lighter moment.



New **PMPs** receive recognition and commemorative coffee mugs from **PMI-OC Chair Kristine Hayes Munson**, **PMP** and **PMI-OC Director at Large Victoria Flanagan**.



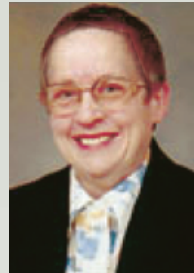
Above: **Judy Voight-Wong**, **PMP** presents raffle prizes to the lucky winners.

ADVANCED TOPICS SEMINARS

Real Time Project Management: Lessons from the Junkyard

Your boss calls you in on a Friday afternoon and hands you a super urgent assignment that you and your team must deliver by the coming Monday morning. "Failure is not an option," you are told as an encouragement, as though that didn't go without saying.

Many of us project managers can tell tales about such experiences—been there, done that—and all the worries and improvisations that go with them. Just what is the best way to handle assignments like these? This was the topic of Pam Wiedenbeck's presentation* at the Advanced Topics Seminar on Saturday, November 5, 2005.



Pam had an excellent idea; she showed portions of videos from the highly acclaimed 1980s era TV series, "Junkyard Wars." In each of the videos, two teams receive an assignment and ten hours in which to complete it. The teams must retrieve all the parts and components they will need from a huge junkyard; they are, however, given all the power and hand tools together with whatever supplies they may need. To be sure, none of the teams have any advance knowledge of the tasks awaiting them. The teams themselves are assembled *ad hoc*, with some members total strangers to each other.

After Pam had shown a video segment, she proceeded to explain how its plot relates to project management. Soon it dawned upon us that these videos have value quite beyond entertainment; they show people in the midst of coming to grips with project objectives and illustrate how these people should be going about achieving them. In a real time documentary, so-to-speak, these videos show them struggling with deliverables, assumptions, scope, and deadlines. Most revealing to project managers, the videos showed what not to do when accomplishing a project on a very short fuse.

The teams were dead serious as they went about their business, but at times they found themselves in downright hilarious situations; after all this was TV. All of us in the audience certainly had our share of fun.

One video was particularly revealing. In it, there were two four-member teams, the Dipsticks from England, and the NERDS (who called themselves the New England Rubbish Deconstruction Society) from the U.S. Their assignment: from junkyard components build a steerable submarine that can dive down to ten feet. The submarine must be propelled by its own power, with two team members in diving gear steering it.

The English Dipsticks were practical, experienced mechanics guys. They knew all about shipbuilding and submerging under water. The American Nerds, on the other hand, were physicists, metallurgists, and mathematicians who had never met each other before.

The teams went about their tasks very differently. The Dipsticks went right away scrounging about the junkyard; the Nerds began pondering about buoyancy, underwater drag, and the force needed to propel their craft.

At this moment, Pam stopped the video and asked us participants to analyze what we had just watched. She referred us to the templates shown on this

page and asked us to identify the objectives and deliverables. The deliverable was clear; build a submarine that earns the most points. The objectives required some thought. In the video they were not formally stated, but implied by the context: employ the team members' expertise to design and build the submarine; make the submarine capable of diving down to ten feet; and pass all the gates successfully. And all that within ten hours.

Use these templates to focus first on the objectives, next on the deliverables, then on the assumptions, making sure that the governance data are available before the boss leaves for the weekend.

Continued on page 8

| Real Time Project Management Planning Template | | Template Entry | Purpose and Use |
|--|--|----------------------|--|
| Objectives: | 1. _____ 2. _____ 3. _____ | Objectives: | 1. State clearly what must be done: <ul style="list-style-type: none"> Use a strong imperative verb to start your sentence. Use a clear and unambiguous direct object. Use a single prepositional phrase that refers to the recipient of the benefit by verb and direct object. 2. Use one sentence for each objective. |
| Deliverables: | | Deliverables: | 1. Use one, and only one, deliverable. You are operating on a short time fuse. <ul style="list-style-type: none"> If you have multiple deliverables, assemble multiple real-time teams. If you get only three days to complete the assignment, you can accomplish only one deliverable. (If you give more than one deliverable to a team, you create confusion about the objectives.) 2. Employ a strong declarative sentence in the active voice. <ul style="list-style-type: none"> Active voice exudes confidence. Passive voice creates ambiguity. One of the PM's goals is to reduce ambiguity. |
| Assumptions: | 1. _____ 2. _____ 3. _____ | Assumptions: | 1. Collect the stated assumptions, which are: <ul style="list-style-type: none"> What your manager tells you. What you tell your manager. 2. Mind the hidden assumptions, such as: <ul style="list-style-type: none"> What you find out while filling out the template. What might change as you execute your project. 3. Use clear, unambiguous declarative sentences. <ul style="list-style-type: none"> Most assumptions reside in your head. The timeline is too critical to leave assumptions to chance. 4. Validate your assumptions with your manager. <ul style="list-style-type: none"> E.g., confirm, "This is why we change direction." 5. Document and communicate all changes. <ul style="list-style-type: none"> Create short contingency plan. Communicate this template to your entire team. |
| Resources: | | Scope: | 1. Limit the scope to the SINGLE defined deliverable. <ul style="list-style-type: none"> If your scope specifies more than one deliverable, divide this template among deliverables, and give each to a team. 2. Obtain WRITTEN confirmation of the scope. |
| Schedules: | | Milestones: | 1. Select the milestone frequency: <ul style="list-style-type: none"> Divide the time span into two to five equal time periods. Define a single milestone for each time period. In a short project, milestones are essential; if there are none given, create some artificially. Example: backup done at time x. Challenge: create a milestone where none exists. 2. Specify the milestone success criteria: <ul style="list-style-type: none"> This is no different than the criteria for successful completion stated in the WBS dictionary for a work package. |
| Scope: | | Governance: | 1. Define roles and responsibilities for: <ul style="list-style-type: none"> Team members Sponsor Customer Project manager 2. Define an escalation procedure: <ul style="list-style-type: none"> Create a short escalation plan: whom are you going to notify if a specific milestone cannot be met? Set up a conference call at mid-milestone. Use the escalation procedure to track a mid-milestone; it's not a substitute for a communication plan. 3. One subject matter expert (SME) per team: <ul style="list-style-type: none"> Test your assumptions against the knowledge of the SME. Validate the results with your manager. |
| Milestones: | 1. _____ 2. _____ 3. _____ | | |
| Governance: | Customer: _____ Sponsor: _____ Project Manager: _____ | | |
| Deployment & Improvisation: | | | |

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*Find out more on Pam's website at <http://www.plansmadeperfect.com/index.htm>.

Pam asked us next to examine the assumptions. They were rather murky, not only to us, but also to the Nerds and Dipsticks. Just what did the submarine have to look like? What is a suitable way to propel it? How does one achieve just the right buoyancy with the weight of two team members, the motor and all the other gear on board? None of these parameters were given to the teams; they had to figure them out on their own. Such conditions are actually rather commonplace in short-fused projects. The team members have to improvise and pool their resources creatively.

The Dipsticks, being the experienced divers that they were, designed a craft from a discarded airplane fuel tank, with a hollowed-out seating area for the two drivers, and with external rudder mechanisms.

The Nerds literally started at the drawing board. Complicated formulae were evaluated, and weight ratios and drag coefficients were determined, all highly sophisticated and professional. They built their craft from a water heater and chose the drivers to be external to their craft, à la James Bond. But would it submerge and float?

Here Pam again stopped the video and prodded us to revisit our assumptions. The assumptions are obviously tightly linked to the deliverables. With that she came to a crucial point: have only one deliverable per team on short-fused projects. Decide and agree what it is, and rally your team around it. That's why her template is so powerful, for it places everybody onto "the same page."

Last, but not least, Pam impressed upon us to pay close attention to the governance section in the template. "As you work over the weekend, make sure that you have reliable ways to get in touch with your customer and sponsor. Make sure you that you can reach your boss via cell phone or Blackberry, because questions will inevitably arise that need answers without delay."

Let's look more closely at the numbered entries in Pam's template on the previous page. These tables give detailed instructions. Use them as a guide as you fill out the template. It ensures that you will not accidentally overlook something. It also strengthens your confidence in your own abilities as you manage your project under increasing pressure.

The Dipsticks lost the race dismally. The Nerds nearly blew it, too, but in the end, the day was theirs.

Pam, it was a delight to follow your recommendations and fun as well, as you spiced up your message with entertainment. Thank you.

George D. Meier, PMP

Upcoming PM Training Classes in the Orange County Area

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WI06-41D

VOLUNTEER APPRECIATION DAY

Or Should We Say Family Day?

The 2005 PMI-OC volunteer appreciation bowling event turned into family day. A number of volunteers came with their families. A great time was had by all.

On Saturday, November 12, we converged on Irvine Lanes for an afternoon of bowling. We had seasoned volunteers, board of directors members and new volunteers all together. We also had a chance to meet many of **Mike Graupner's** instructors. **Al Cruz** and **Dave Stiles** joined us after teaching in one of Mike's PMP® workshops that day.

Many of our volunteers came and bowled, while others were there just for the fun, good friends, good food, and prizes.

Originally, we had planned a bowling contest. However, we were so caught up in the moment, we just started raffling off all the prizes. There was everything from movie tickets to dinner meeting certificates and baskets of wine and chocolate. **Rod**, make sure your kids share some to the chocolate with you.

Once again, a big **thank you** to all the volunteers who help make PMI-OC such a great organization to be part of. *It is what it is because of all your hard work!!!*

*Thank you,
Brent Felsted, PMP*



Top: **Rod Hendrixson, PMP** and his family proudly display their raffle prize of Ghirardelli chocolate.

Center: **Irvine Lanes**, Southern California's premiere bowling center
Center right: Checking the score

Above, left to right: **Linda Keller, PMP** wins free admission to an Advanced Topic Seminar; **Reza Bourbour, PMP** and his wife with their gift baskets of chocolate and other goodies; **Sylvan Finestone, PMP** and his wife Gwen win wine and cheese.

Right: **Frank Reynolds, PMP** scores a PMI-OC logowear shirt.

Scholarships Available

The 2006 PMI® Education Scholarship application has been posted on the PMI Educational Foundation website, and the foundation has begun accepting applications.

Some major and exciting modifications to the application process have been made this year, streamlining the collection of the data, as well as making it easier to navigate.

The application now requires submission of two essays, which should provide more valuable information and help differentiate the candidates.

The PMI® Educational Foundation was founded in 1990 by the Project Management Institute. It is a non-profit, non-political, charitable organization within the meaning of the Internal Revenue Code. As a charitable organization, it is dependent on contributions to provide the income necessary to undertake its purposes.

Competitive scholarships are awarded to individuals pursuing a degree in a project management related field based on merit, as measured by academic performance, co-curricular and extracurricular activities.

Please go to the PMI Educational Foundation's website at www.pmi.org/pmief and refer to the scholarship dropdown for scholarships available and further information.

Each year, PMI-OC sponsors a **\$1,000 Charles Lopinsky Memorial Scholarship**, which is awarded through the PMI Educational Foundation. This scholarship is open to students who are Orange County residents and are pursuing a degree in project management.

Application deadline for this scholarship is May 21, 2006.

The 2005 Charles Lopinsky Memorial Scholarship was awarded to **Pornegin Merikhbayat**. Pornegin is a graduate student at California State University, Northridge, studying engineering management. She is employed at the Lincoln Child Development Center as a teaching assistant and also works at "Fruits to Remember," designing gift baskets.

Pornegin has published and translated several articles, including "The Role of Urban Management in Tourism," *The Surveying Magazine*, and "The Future of Internet GIS," *The Surveying Magazine*.

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— Christopher Lanzano
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PMI-OC NEW MEMBER ORIENTATION

The New Member Orientation was held on Thursday, November 17th, at the University of California, Irvine (UCI). The orientation was organized by **Rod Hendrixson, PMP**, Membership Director of PMI-OC; **Stan Kang**, Membership Chairman; **Myrna Bravo, PMP**, Ambassador Chairman; and **Barbara Rotondo**, Ambassador (UCI Corporate Accounts Manager).

Stan Kang began the orientation with introduction of board members and volunteers. Rod Hendrixson announced upcoming PMI-OC events, and **Melanie McCarthy** (MAC Experienced Resources, Inc.) and **Glen Fujimoto**, PMI-OC Chair Elect (Kelley Blue Book) listed job openings. The remainder of the evening was devoted to information on services available from PMI-OC and “Networking 101” training by Melanie McCarthy.

Stan presented PMI-OC’s vision as follows: “We are recognized as the **volunteer organization** of innovative project management professionals. We provide value to our shareholders and the community at large. We promote the development of project management as a benefit to all industries.”

PMI-OC is recognized as one of the best run chapters within PMI®. This reputation is earned by volunteers who organize many events throughout the year and offer innumerable benefits. Stan shared some of the benefits with the audience.

- Networking and Information Sharing
- Certification Workshops
- Professional Development
- Seminars and Conferences
- Product and Event Discounts
- Volunteer and Leadership Opportunities
- Job Search Assistance

Stan went on to explain many of the events that the chapter hosts each month. One of the most popular benefits that PMI-OC offers is networking and information sharing. Some of the monthly networking events include the dinner meeting and breakfast roundtables.

The dinner meeting is held on the second Tuesday of each month, offering a unique opportunity to network with professionals in various industries and to learn new tools and techniques in project management. Breakfast roundtables are informal gatherings of project managers to discuss current topics in the profession, learn and promote best practices, and seek answers to questions.

Another monthly event is the Advanced Topic Seminar, offering a great opportunity to earn four valuable professional development units (PDUs) and learn from leaders in project management. If you are not a PMP®, then you can attend PMP certification workshops held several times a year. The workshops are taught by volunteers, many of whom have recently attained their PMP certification. The majority of attendees who enroll in the workshops achieve PMP certification.

Victoria Flanagan, Director at Large of PMI-OC, presented PMI-OC’s statistical rankings within PMI and its components.

PMI-OC Stats as of October 31, 2005:

| | |
|---|---------------|
| PMI-OC membership size: | 1,617 |
| PMI-OC PMP count: | 889 |
| Rank in Southern California by membership size, out of five chapters: | First |
| Rank in California by membership size, out of ten chapters: (behind San Francisco Bay Area) | Second |
| Rank in Region 7 by membership size, out of 17 chapters: (behind San Francisco Bay Area and Phoenix) | Third |
| Rank worldwide by membership size, out of 248 chapters: | 28th |

Notes:

- Only 12 percent (or 30) of worldwide chapters consist of 1,500 or more members.
- California chapters consist of approximately 9,850 members.
- Region 7 chapters consist of approximately 13,160 members.
- Worldwide chapters consist of approximately 149,410 members.

The second half of the New Member Orientation was “Networking 101” presented by **Melanie McCarthy**. She revealed many networking tips, including the following five valuable networking tools:

1. Have your 30-second commercial (also referred to as your elevator pitch) ready at all times. It should include your industry, profession, and discipline.
2. Have plenty of business cards with you. Print your 30-second commercial on the back of your card. Don’t forget to include PMP, if applicable, next to your name.
3. Place your name tag on your right shoulder for easy sight recognition.
4. Create a networking brochure promoting yourself.
5. Keep a copy of your resume handy. You never know when you will meet someone.

Some of Melanie’s other networking tips: arrive at events early to network; be aware of your body language; don’t sit down; and know when to move on.

This is just the tip of the iceberg on what you can learn about networking.

Melanie encouraged the new members to participate by presenting their 30-second commercials. The reaction from the new members was extremely positive with 100 percent participation.

I met with several members after the meeting: they had enjoyed the evening and took away valuable information.

To learn more about upcoming events and to receive PMI-OC’s *E-mail Blast*, please log onto our website at www.pmi-oc.org.

Rod Hendrixson, PMP
membership@pmi-oc.org



Learn for Project Management

UC Riverside offers a six-course certificate program in Project Management. Classes for Winter quarter are:
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Thur., 6:30-9:30 pm, Jan. 12-Mar. 16
Reg #053-MBJ-B03, Fontana

PROJECT QUALITY AND PERFORMANCE MANAGEMENT

Thur., 6:30-9:30 pm, Jan. 12-Mar. 16
Reg #053-MBJ-B02, Riverside

PROJECT LEADERSHIP, COMMUNICATION AND TEAM BUILDING

Mon., 6:30-9:30 pm, Jan. 9-Mar. 20
Reg #053-MBJ-B01, Riverside

MANAGEMENT OF INFORMATION TECHNOLOGY PROJECTS

Wed., 6:30-9:30 pm, Jan. 11-Mar. 15
Reg #053-MBJ-B04, Riverside

LEAN PRINCIPLES AND PRACTICE

Thur., 6-9 pm, Jan. 12-Mar. 30
Reg #053-MBI-B63, Temecula

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SEPTEMBER MEETING REVIEW

So You Want to Build a PMO? Good Luck!

Starting off with a wry “Letterman-style” countdown of the top ten reasons why not to build a PMO, **Chris Peduzzi** had attendees interested from the start in his presentation, “So you want to build a PMO? Good Luck,” at the September dinner meeting. From a rich background in IT and project management, Chris presented the stumbling blocks and success stories for building a PMO. Chris has led the establishment of three project management offices; he spoke from the point of view of both expertise and experience.

Background and Initial Challenges

When Chris started at Option One Mortgage, he was responsible for the company’s entire technology infrastructure, which included third party applications and systems, internally developed applications and systems, and off-the-shelf applications. There was no CIO; at the time the IT department was led by committee. Not one project in his area had “a charter, scope document, project plan, project schedule, Post-It note, Crayola drawing . . . nothing available that was used to manage their projects.”

Getting Started

It all began with a “Master Project List;” if the project wasn’t on the list, it didn’t exist. Creating this list, in and of itself, was a major milestone toward creating a project management process. A Project Prioritization Committee for Servicing was created to rank and prioritize each project. In order to receive a ranking or priority, the project sponsor needed to provide justification for the project. Project justification required the submission of basic project documentation, most importantly, a project charter.

From this came the birth of the project management office. Basic project documents were willingly developed to ensure projects received priority on the list. Before long, he instituted a basic foundation for initiating, planning, and executing projects. The only way to gain the support of the other IT teams was via proof of concept. (Remember, there was no CIO yet.)

Proof of Concept Successful!

Within just six months of deployment, this new process had contributed to the successful completion of long-delayed or dormant projects. After the first year, Chris’ unit had completed approximately 250 percent more projects than in the **two** previous years combined. In a project review conducted by the new CIO, it was evident that the group was implementing more solutions faster than other internal IT teams. Upon determining that the success was due to the new project management processes and methodologies, the CIO mandated that these same processes and methodologies be used by all IT teams for all projects. Project management practices would now become a consistent standard for completing all IT projects enterprise-wide . . . **and a PMO came forth!**

Freedom Communications Presents Similar Challenges

Chris had similar challenges at Freedom Communications. Privately owned, family run, in business since 1935, it has a culture ingrained with strong Libertarian precepts. This includes limited government (translates into limited corporate governance with very decentralized operations) and self ownership; each individual has the right to control his/her own body, speech, action and property (translates into very independent business units who prefer to do things their own way)

Here he found inconsistent application of formal structure or traditional documentation on projects. Structure and documentation existed only if predicated by the project manager’s personal experience. Processes and methodologies had been identified for use on managing projects, but were not enforced. The IT organization had recently been centralized under the corporate CIO. Being an organization based on limited corporate governance, this change was not met with tremendous popularity.

Initial Challenges from IT

The project landscape was an unknown in terms of what projects were active, completed, canceled, pending, etc. No single source for complete project information existed. Project teams were disjointed and unclear on what was expected of them. The value of project management and the project manager role were unclear. Communication on project status was somewhat arbitrary; frequent miscommunications on progress occurred between IT and the business units. Project schedules typically did not exist, and those that were prepared were not up-to-date on either tasks or due dates. Projects frequently got underway without much up-front assessment done by either the business units or IT; therefore, objectives were not in alignment between the two groups. Project stakeholders and owners were not always clearly defined. Business project teams were not in agreement on project objectives.



Budgets and the estimated costs of projects were not well-defined or legitimate.

Getting Started

Chris started out at Freedom in a manner very similar to his start at Option One. He spent a good deal of time creating a master project list, which initially consisted of 40 plus projects. He started by addressing the basics and seeking to understand what projects were on the list, how many were on the list, how long they were on the list, what type of projects they were, business need for the projects, complexity of the projects, etc. He also launched the idea of creating a “Project Starter Kit.”

The Project Starter Kit

A “Project Starter Kit” was developed and consisted of the following documents: Project Charter (more of a traditional project plan), Budget Worksheet, Status Report, Meeting Agenda, Meeting Minutes, Issues Log, Risk Assessment Matrix, Roles and Responsibilities, Change Request, and Project Schedule.

Finding a Home for Project Information

Freedom needed the ability to house and maintain project data in one centralized project repository. Metafuse’s *Project Insight* was selected and branded as *Freedom Projects inFocus*. *Freedom Projects inFocus* now serves as the company’s enterprise-wide central repository for all project-related documentation. It includes capabilities that allow online management of project schedules by all project team members, general project reporting, financial project reporting, project task reporting, and management of project resources. It provides an executive dashboard view of projects with the ability to drill down into as much detail as desired.

The “Project Starter Kit” and *Project Insight* were implemented simultaneously. This “big bang” approach worked best to lay the initial foundation and initiate a mutual sense of importance within IT. It was developed and implemented in a three month time frame!

With the basic foundation laid, the goal is to implement additional structure and controls as we proceed. Before proceeding with the execution of additional structure and process, it’s key to ensure that what’s in place is both functional and effective. Spot-checks and audits to verify that project documents are being produced and validate the information contained herein.

*General recommendations
continued on page 17*

BOARD OF DIRECTORS PLANNING FOR 2006

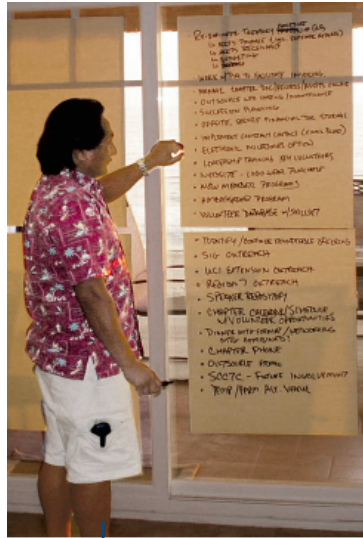
On the first weekend of November 2005, the PMI-OC 2005 and 2006 Boards of Directors met in San Juan Capistrano for the annual planning meeting.

The events began on Friday evening, with team building exercises and learning more about each other.

In one of the first planning activities we undertook, each person was asked to write their different goals or concerns on a three by five card in four words or less. Later, we acted out the goals through picture or charades; this was both challenging and funny. Just try to draw or act out something like "Build PMI-OC Brand Name" or "Build Member Value."

Over the course of the three day event, the 2005 and 2006 board members pulled together as a team, discussing the vision and objectives for next year. There was lots of discussion about the important issues and the chapter's direction.

In the end, the membership once again was the big winner. The improvements may be



harder to see on the surface; for example, a number of time saving directives in the areas of accounting and the website.

These time saving initiatives will allow our volunteers to focus on the membership at large. This has always been the underlying goal of the chapter and board of directors.

Brent Felsted, PMP



Clockwise: **Glen Fujimoto**, 2005 Chair Elect/2006 Chair; **Cornelius Fichtner, PMP**, 2005 Programs Director/2006 Chair Elect; **Stephen June, PMP**, 2005/2006 IT Director; **Pia Nielsen, PMP**, 2006 Finance Director/Treasurer; **Gene Dutz**, 2005 Finance Director/Treasurer; **Pan Kao, PMP**, 2005/2006 Operations Director/Secretary; and **Cornelius Fichtner** share a contemplative moment.



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Here is your chance to be recognized by the Project Management Institute for your excellence and contribution to the institute and advancement of the project management field. Every year PMI® conducts a Project of the Year (POY) competition in search of superior performance and execution of exemplary project management. Your project and your team's success could be publicized and recognized for superior performance and execution of project management principles and contribution to the industry, as well as locally in the industry. The process involves three tiers of competition: Preliminary, Semi-Finalist, and Finalist.

PRELIMINARY LEVEL: ONE PROJECT SELECTED IN ORANGE COUNTY

Submit your project to the PMI Orange County Chapter by **January 27, 2006**. A panel of local project management experts designated by our chapter will review your project. Only one nominee will be selected by **March 3, 2006** for advancement to the Semi-Finalist Level. The PMI-OC POY Committee will contact all applicants directly with the Preliminary Level results. Furthermore, we will announce all applicants and this level's results to our membership at our March dinner meeting and in our *Milestones* newsletter.

SEMI-FINALIST LEVEL: THREE PROJECTS SELECTED WORLDWIDE

The PMI-OC POY Committee will submit the nominated OC project (winner from the Preliminary Level) to PMI Headquarters. A central panel of project management experts from around the world will review your project, along with Preliminary Level nominees from other chapters. Three (3) finalists will be selected by **May 12, 2006** to advance to the Finalist Level.

FINALIST LEVEL: FINAL POY AWARD

The three finalist entries will be evaluated by a central panel of reviewers from around the world who have demonstrated successful project management expertise. The recipient of the PMI Project of the Year Award will be selected by **July 17, 2006**. PMI Headquarters and PMI Board of Directors will acknowledge the PMI Project of the Year Award winner, as well as the other two finalists. The POY award will be presented at a specified PMI event.

SUBMITTAL AND CONTACT INFORMATION

To find out more about the eligibility and submittal requirements, please visit the PMI POY site: http://pmi.org/prod/groups/public/documents/info/ap_projectofyearaward.asp. Contact the PMI-OC POY Committee via e-mail at POY@pmi-oc.org with any questions.

Submit your project entries to the PMI-OC POY Committee via e-mail at POY@pmi-oc.org by **January 27, 2006**.

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PMI Orange County Chapter Announces its 2006 Winter Course



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Six Saturdays Beginning January 28, 2006

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This workshop will help you prepare for exam success, and will provide you with the eligibility requirement of 35 contact hours in project management education. Participants will be provided with a classroom discussion guide and a supplemental text that includes study questions on CD-ROM. Also, participants will have access to additional study material.

When: Six Saturdays from 8 a.m. until 5 p.m.

| | | |
|------------|-------------|-------------|
| January 28 | February 11 | February 25 |
| February 4 | February 18 | March 4 |

Where: To be determined

Cost: **Sign-up for the mailing list is free.** The workshop fee itself will be per participant, payable at the time of registration. Classes fill very fast and cannot exceed 60 participants. Sign up for the mailing list now, so you will be the first to be notified when enrollment begins.

Register by January 10th to receive a special discount!

- PMI Member: \$575 prior to January 10, \$625 after January 10
- Non Member: \$725 prior to January 10, \$775 after January 10



Mailing List:

There is no charge for mailing list sign-up.
Sign up at www.pmi-oc.org.

Questions: Via e-mail to: programs@pmi-oc.org

Note: This course is NOT intended to teach the participant project management or to impart project management industry experience. Its primary purpose is to prepare the participant for the PMP exam based on the PMI identified domains and PMI recommended preparation material.

PMI-OC DINNER MEETING

Tuesday, December 13, 2005

Program: **Medicare: As Simple as ABC and D**
Robert "Bo" Kehrer, PMP

Location: **Wyndham Orange County Airport**
3350 Avenue of the Arts, Costa Mesa
Take 405, exit at Bristol, turn onto Anton, left on Avenue of the Arts

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

Cost: **Dinner and Presentation**
In Advance: *At the Door:*
Members \$25.00 Members \$40.00
Non-Members \$35.00 Non-Members \$40.00

Featured Presentation Only (Members and Non-Members)
In Advance: \$10.00 *At the Door:* \$15.00

Please register at www.pmi-oc.org. You can pay by credit or bank card in advance or by cash, check, or credit card (Visa or MasterCard only) at the door.

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

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Members and non-members who cancel their reservations after Sunday, December 11, or anyone who makes a reservation and does not attend, will not receive any refunds.

PMI-OC BREAKFAST ROUNDTABLES

PMO-Local Interest Group (LIG)

Tuesday, December 20, 2005

Third Tuesday of every month

Location: **Hilton Hotel**
3050 Bristol Street, Costa Mesa (one block south of 405)
Atrium Café, Lobby Level

Time: 7:15 – 8:30 a.m.

Register: E-mail to **Robert Perrine, PMP at info@pmi-oc.org**

Cost: Self-paid breakfast, parking is validated

Breakfast with Your SOX On

Thursday, January 12, 2006

Second Thursday of every month

Location: **Doubletree Hotel, Irvine Spectrum**
90 Pacifica Avenue, Irvine
(405 and 133 Freeways)
Meritage Restaurant & Wine Bar
Full breakfast buffet

Time: 7:15 – 8:30 a.m.

Register: E-mail to **Kevin Merriman, PMP, CSOX at soxbreakfast@pmi-oc.org**

Cost: Self-paid breakfast, parking is validated

NEW MEMBERS

Continued from page 2

Ramon Robles
Ajilon Solutions
Joseph Shiuan
Rup Sinha
Dorinda Sullivan
Lam Tran
SICOR Pharmaceuticals
Joycelin Tsai
Esuchen Lab
Susan Van Domelen
CyberConsulting
Barry Whitesides
Shine Xavier
US Technology
Deborah Yarnal
Apria Healthcare
Suresh Yerraguntala
Oracle

Total New Members 45
Total PMI-OC Members 1,617
Total PMI-OC PMPs 889

SEPTEMBER REVIEW

Continued from page 13

General Recommendations

- For true success, the PMO needs to be supported at the highest levels of an organization.
- Start out simple with processes and structure that can be implemented quickly and have the greatest effect.
- Lay the foundation first, and then build as you go.
- Start out small; prove the value, and the support will come.
- Audit your processes within the first 60-90 days of implementation to verify and validate progress/results, and be prepared to make changes quickly to address problem areas.
- Take it to the next level ASAP. Take advantage of opportunities to move quickly; they're few and far between!
- Provide visibility of the top ten projects immediately to executive leadership, i.e., project dashboard, **especially** on project costs.
- Establish a solid process for prioritizing and initiating projects, and be sure the business/stakeholders help to establish the process.
- Measure your success as you go, and be prepared to "back up" your statistics with hard evidence of success.
- Be sure to create an environment of coaching, feedback and professional development for project managers, business analysts, etc. Extend the value of the PMO beyond just projects.
- **Don't take criticism personally; establishing a PMO isn't for the faint of heart!**

Lora Lockwood, PMP

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Pages 3-6, 10: **Shirley Goodwin, PMP**
Pages 9, 14: **Linda Keller, PMP**



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.

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COMING EVENTS



DECEMBER 13 DINNER MEETING

Medicare: As Simple as ABC and D
Robert "Bo" Kehrer, PMP



DECEMBER 14 HIMSS Executive Breakfast

Healthcare Information and Management Systems Society
Southern California Collaborative Healthcare Executive Breakfast
Hyatt Regency Irvine
Registration: <http://www.himss-socal.org/new/new.html>



DECEMBER 20 BREAKFAST ROUNDTABLE

PMO-Local Interest Group (LIG) Breakfast Roundtable



JANUARY 7 ADVANCED TOPIC SEMINAR

Topic and presenter to be announced
Location: UCI



JANUARY 12 BREAKFAST ROUNDTABLE

Breakfast with Your SOX On



JANUARY 27 PMI® PROJECT OF THE YEAR

Submission Deadline



JANUARY 28 WINTER 2006 PMP® WORKSHOP

Visit www.pmi-oc.org for mailing list sign-up



FEBRUARY 7 DINNER MEETING

Wyndham Orange County Airport **Ballroom**
Topic to be announced
Please note special date and room

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

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