



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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JANUARY 10TH PMI-OC DINNER MEETING

Now What Do I Say? The Human Side of Communication

By *Steve Kaye, Ph.D.*



Surveys show that managers spend a third of their time fixing problems caused by poor communication. Disagreements, misunderstandings, and incomplete information waste time and money. In fact, bad communication can destroy a business and ruin a career.

This powerful presentation shows people how to communicate effectively. You will gain proven techniques to guide conversations, establish rapport, and earn trust. You will learn how to overcome obstacles to open communication and how to influence others. You will learn how to distinguish yourself as a leader with the essential skill of communication. Caution: The techniques shown in this presentation are so powerful they even work at home!

Steve Kaye, Ph.D. is a communication expert who shows people how to get what they want. He has published over 190 articles on leadership skills, written three books, and appeared on radio and TV. His workshops on communication skills have informed and inspired people nationwide since 1992. He has a Ph.D. in chemical engineering from Carnegie Mellon University and 20 years of experience working for major corporations.

Steve will also conduct PMI-OC's February 4th Advanced Topic Seminar, "Help! I'm Stuck in a Meeting, and They Ran Out of Donuts." Plan to attend this seminar to learn how to hold effective meetings and have fun. See page 11.

Special Announcements

February Dinner Meeting Date Change

February's dinner meeting will be on the first, instead of the second, Tuesday. Please join us on Tuesday, **February 7th** to hear **Steve Garfein** discuss "Strategic Portfolio Management: A Blueprint for Successful Implementation." See page 18.

2006 PMI-OC Registration Fees

Due to increased costs, PMI-OC will be changing the registration fees for both the advanced topics seminars and the dinner meetings.

These changes will be effective beginning with the January 7th advanced topic seminar and the February 7th dinner meeting. See page 17 for details.

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NEW MEMBERS

Derek Barraza
Compuware Corporation

Michael Brown

Tricia Burch

Monica Celnar

Molly Chang
Hyundai Information Service
North America

Joseph Cruz
Honeywell

Tien (Bruce) Do
Experian

Jon Gallegos

Edward Groleau

Vivek Gupta

Abhay Hanamsagar

Doron Hirshberg

Abigail Hooker
SBC

Olivier Houdement

Karen Inman
The Merit Companies

Daniel Lee
Therman Engineering International

Richard Little
MOCEAN

Iain Moffat

Jeffrey Montgomery
Beckman Coulter, Inc.

Ben Oh

Sumesh Pervala

Prashant Rege

Joanna Rieder

Stephanie Rubio
Southern California Gas Company

Mark Rumbaugh

Michael Salai

Sally Slack
Promedica International

Dorothy Soteriou
MDS Pharma Services

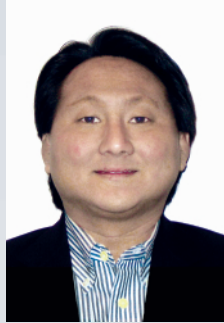
Cynthia West
Metafuse, Inc.

Total New Members 29

Total PMI-OC Members 1,609

Total PMI-OC PMPs 872

THE CHAIR'S COLUMN



Welcome to the New Year!

Happy New Year to everyone, and welcome to 2006! By this time, the holiday season is wrapping up; kids are going back to school; and businesses are ramping up to achieve goals for the new year.

As I start off the new year, I have a few items on my "to do" list. The first order of business is to thank you, the members, for allowing me to serve as your chair and president for 2006. I look forward to the great opportunities we have ahead of us.

The second order of business is to give you a quick summary about myself. So who is this **Glen Fujimoto** guy?

I have worked in IT for many years, with the majority of my career focused on building externally facing customer/client applications. Much of my career has been related to the automotive industry, ranging from dealer management system providers, automotive manufacturers, and finally, where I work now, Kelley Blue Book, an automotive information provider.

Years ago, I didn't know anything about PMI® until a friend encouraged me to attend a local chapter meeting (thanks, **Adrienne**). Soon after, in December 1998, I joined PMI-OC and began a journey that has enriched my career and my personal life more than I ever imagined.

After attending dinner meetings on a regular basis, I was approached by **Janice Preston, PMP**, one of the chapter's superstar volunteer recruiters. At her urging, I volunteered to help on one of the committees. One thing led to another, and I joined the PMI-OC Board of Directors in 2001. I have Janice to thank for that gentle nudge, as well. Four board positions and five years later, I now have the distinct pleasure of leading this organization into the new year.

And what a past year we have had! In the last 12 months alone, we have seen our membership rise by over 250 members to more than 1,600. Our chapter membership now has over 850 PMPs; it was only last year that we finally hit the 500 mark. Over 80 chapter events were held, including our first all day event, PMInAction, and our special dinner meeting with **Greg Balestrero**, CEO of PMI. These events provide our members with a wide variety of opportunities to learn, network, and participate.

This leads me to highlight some of the recent work completed by the PMI-OC Board of Directors. During the series of meetings that were part of our 2006 planning process, we decided not to change our existing Vision and Mission. However, we felt that we needed a very direct and concise message that would help the board keep focus and ensure that the activities we undertake support that purpose. To that end, we have created a chapter purpose statement:

Providing Members Quality Professional Development and Networking Opportunities

These eight words embody the chapter's direction and give us a guide post to ensure that the actions we take and the decisions we make address the key values identified by our members: **professional development** and **networking**.

Additionally, we have identified three objectives for the chapter this year:

- Increase member retention
- Increase volunteer retention
- Increase effectiveness of critical operational tasks

In additional *Milestones* articles, we will expand further on the purpose statement and the 2006 chapter objectives and supporting key projects.

As we exit our chapter's 15th anniversary, I look forward to our exciting journey, seeing what the next 15 years hold for us.

Glen Fujimoto
Chair/President



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VOLUNTEER OF THE MONTH

Nitin Gotmare, PMP Honored for December 2005



A resolution was unanimously passed at the November 2005 board meeting of your chapter designating **Nitin Gotmare, PMP** as **Volunteer of the Month for December 2005**.

Chapter Volunteer Coordinator **Sylvan Finestone, PMP** honored Nitin at our December dinner meeting by presenting him with a Certificate of Appreciation.

Nitin has been a member of the chapter for over two years. For the last nine months he has been assisting the Director at Large in developing and supporting the Chapter Advisory Council. This council provides expert, third-party, executive level guidance leading to improved value to the membership and chapter operations.

PMI-OC Director at Large **Victoria Flanagan** states, "Nitin's role has been instrumental in setting council discussion priorities, assuring smooth running sessions, and coordinating follow-up activities."

Nitin comments, "I enjoy volunteering at PMI-OC and have found tremendous value in the great networking opportunities, professional development and personal satisfaction that volunteering provides."

*Congratulations, Nitin.
Sylvan Finestone, PMP*

Test Your Knowledge on PMP® Exam Questions

Answers are on page 17

1. You have awarded a contract to a consultant to provide general services, which you will identify from time to time. You have agreed to the consultant's fixed hourly rate of \$150.00 per hour. In order to establish a contract value, you estimated that it would require 100 hours for his/her services. However, the number of hours may be increased or decreased at your discretion. How would you define this type of contract?
 - a. Lump-sum contract
 - b. Cost plus fixed fee
 - c. Fixed unit price
 - d. Fixed price with award fee
2. There are several tools and techniques for cost estimating. Which of the following is *not* a tool for cost estimating?
 - a. Cost estimating templates
 - b. Bottom-up estimating
 - c. Parametric estimating
 - d. Analogous estimating
3. You are the manager for a construction project. There is a local ordinance that site excavation cannot start until the environmental impact report is approved. For the purpose of developing a network schedule for the project, this would be considered a:
 - a. Discretionary dependency
 - b. Mandatory dependency
 - c. External dependency
 - d. A lag
4. In a schedule network, all of the following are characteristics of the critical path *except* for:
 - a. The critical path determines the duration of the project.
 - b. The critical path is the same as the critical chain.
 - c. The critical path can be used to determine the amount of float available for non-critical activities.
 - d. Critical path activities have zero float.

PMI-OC FELLOWS HONORED



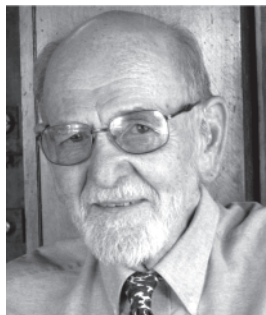
At a ceremony held at the December 2005 chapter dinner meeting, three venerable individuals were honored as Fellows of the Orange County Chapter for their exemplary and legendary service to the project management profession: **John Bing**, **Marty Wartenberg** and **Quentin Fleming**. It should also be noted that **Ed Walker** was the first individual designated for this honor.

In August 2005, our board of directors created a new standing committee with **Ed Fern** as chair and **Judy Quenzer**, **Ed Walker** and **Dave Jacob** as its members. The purpose of the committee is to single out and recognize those members of our chapter, past and present, who have contributed in significant ways to the project management profession. Equally important, the board has rightfully envisioned that the designation of PMI-OC Fellow provides members of our chapter with role models of excellence in service to the project management profession and to the community in general.

Ed Fern opened the ceremonies by pointing out that the influence engendered by each PMI-OC Fellow has been felt not just locally, but in the global project management community as well. As Ed stated, "Their effectiveness stretches to every continent of our planet. Each of these individuals has given time, effort, and superb talent in spreading the project management *gospel*. Each of these individuals is accurately described by the noblest of names. Each of these people is called *teacher*."

Ed further pointed out that in October of 2002, **Kazuo Shimizu**, Director of Professional Development of the PMI® chapter in Tokyo, chose to come to Orange County because of its reputation for world-class project management educational programs. Most assuredly, the work of these three individuals must be credited in the quality project management programs that are available not only in our locale, but also worldwide.

John Bing, PMI-OC Fellow



John Bing was one of the early pioneers teaching project management in China in 1980. He was also instrumental in fostering project management training in Orange County by developing an alliance with Coastline Community College and later became a member of the Advisory Board at UCI to promulgate PM education there as well.

John is a prolific author. His many insightful articles can be found in *The China Business Review*, *PM Network* and *Network Computing*. In 1994 he published a watershed article in *PM Network*, proposing that PMI establish principles of our profession, which identified eight items that are critical for successful projects. This article prompted the initiative to develop the PMI Ethical Standards, a document that most of us know and understand, especially those who aspire to take the PMP® exam. It should come as no surprise that John considers this article one of three important contributions he has made to the project management profession.

In addition to his active role in PMI, including a PMP, John is a life member of the American Society of Mechanical Engineers. He is also a professional engineer, licensed in the state of Texas. John lives in Laguna Beach with his wife, Barbara, and is a member of the Laguna Art Museum Board of Trustees.

PMI-OC Fellows Honored *Continued*

Martin (Marty) Wartenberg, PMI-OC Fellow



In the early 1990s, Marty initiated and headed the highly successful UCI Corporate Contract Program. His legacy is firmly implanted at UCI, as attested by the number of world-class corporations that have invested, and continue to invest, their resources in educating emerging project managers within their respective organizations.

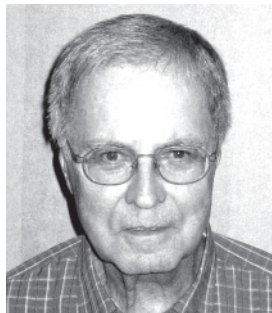
Marty became active in formally teaching project management on a part-time basis for both the University of California, Irvine and California State University, Long Beach. He created and taught some of the very first project management courses offered at both schools. This was

before there was a PMBOK® and the challenge was to capture the most important elements for potential project managers within a 24-hour course.

Marty taught the first courses in project management at both UCI in 1991 and at CSULB in 1995. Some of his most significant achievements are creating, influencing and initiating project management curricula at UCI, UC Santa Cruz, and UC San Diego. He also influenced the establishment of PM and other management courses at UCR, UCLA and CSULB.

Marty is heavily involved in newly emerging non-traditional project management methods, including critical chain project management, extreme or radical project management, and the creation of adaptive project offices in a number of companies. Having had an active role in our chapter as a board member and president, Marty sustains active membership in several other organizations, including the Education and Pharmaceutical SIG, regularly contributing articles to their newsletter; the San Diego chapter of INCOSE; American Electronics Association (AEA) Software Working Group; and IEEE Engineering Management Group

Quentin Fleming, PMI-OC Fellow



Quentin's seminal contribution to the project management profession has been in the area of earned value management. He has authored eight books on EVM and project procurement management, plus publishing countless articles on both these subjects. He has become internationally recognized as one of a handful of world-class gurus in EVM. His books have been translated into Japanese, with editions in Russian and Chinese forthcoming

In 1995, as a member of the UCI Advisory Board, Quentin initiated and developed two core courses for UCI's project management certificate program. These two courses, one on EVM and the other on project procurement, have been upgraded several times to reflect the evolution of the project management profession in general and these two subjects in particular. Courses on these subjects have been offered at UCI over 200 times to over 4,000 students and are currently in use literally around the world.

In the late 1980s Quentin became involved in project management training for our chapter. In that vein, he was able to utilize his professional experience to help other members understand and de-mystify two somewhat complex and what he calls rather dull subjects, earned value project management and project procurement management.

His inauspicious beginnings with his first book, plus his need to reach out to PMI members and professional colleagues, eventually spurred him on to become a prolific writer and lecturer. His articles, too numerous to tally, have been published in a variety of widely-read journals and magazines, including the *Harvard Business Review*, *Project Management Journal*, *PM Network*, *The Measurable News*, and many others, including journals published by IPMA and APM in the UK.

In the mid 70s, while working for Northrop, Quentin took a leave of absence and moved to Tehran with his family, where he was the last Peace Corps Director for Iran and Bahrain.

Dave Jacob



From top to bottom: The first PMI-OC Fellow, **Ed Walker, PMP**, accepts the honor from **Frank Reynolds, PMP** at the June 2005 dinner meeting. **Ed Fern, PMP** opens the ceremonies at the December dinner meeting. Honoree **John Bing** and his wife, **Barbara**. **Marty Wartenberg** receives congratulations and applause from **Ed Fern** and **Judy Quenzer, PMP**. **Quentin Fleming** accepts his fellowship. **Frank Reynolds** leads a toast to the new PMI-OC Fellows.



Earn 14 P.D.U.s

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2005 Spark of Love Toy Drive



At the PMI-OC dinner meeting on December 13, we were joined by members of the Orange County Fire Department, who accepted our donation of toys to their Spark of Love campaign. Joining us, from Station 6, C Shift, were Captain Jeff Peters, Engineer Russ Parker, Firefighter Jaime Serrato, Firefighter Cinnamon Bosco and Fire Prevention Intern Kristie Hiatt.

Like most years, 2005 had its highs and its lows. We've seen a year pockmarked with tragedy and destruction: wars, tsunamis, earthquakes, and hurricanes. For many of us, this has been a particularly painful year. We

have lost loved ones, and the holidays seemed to be arriving just a little too soon for any heartfelt celebrating.

And if all that weren't enough, we work in a profession with uncertain futures, and for companies with even more uncertain futures.

It is just this uncertainty, this unpredictability about life that makes traditions so important. It's comforting to know that no matter what else may happen, our winter holidays will arrive on schedule, with all of our favorite traditions. Once again, and in our own tradition, the chapter and members provided toys to the less fortunate through the Orange County Fire Department.

If a year like 2005 left us feeling uncertain about ourselves or our futures, how much more uncertain, how much more uncomfortable, must it have felt if you were a child? How much more important must holiday traditions have been for children?

The gift you shared with a child was more than just a toy; it was a statement to a needy child that in an uncertain world, a person they don't even know cared about them. Please know that you gave a child a truly beautiful gift, the gift of joy. Because of your generosity, a child experienced the joy of receiving a gift, the joy of opening a gift, the joy of playing with a gift. Because of you, they experienced the true joy of belonging, of fitting in, during a time of year when it was so important to children to feel like they fit in.

On behalf of the PMI-OC Board of Directors, we would like to thank each of you for your generous giving to Orange County Fire Department's Spark of Love and to the children it serves.

Sylvan Finestone, PMP



DECEMBER MEETING REVIEW

Medicare: As Simple as ABC and D

Our December 13th PMI-OC dinner meeting was a little different than usual. We celebrated the achievements of some of the founding members of our chapter (see page 4) in addition to hearing a very timely and topical discussion on Medicare.

Prescriptions Solutions is a longtime supporter of project management and especially the PMI-OC Chapter. **Robert "Bo" Kehrer, PMP**, our presenter, has been an advocate for our profession and an employer of many here in Orange County.

Bo runs the project management office (PMO) at Prescriptions Solutions and has been involved in the health care industry for many years. Prescriptions Solutions is a wholly owned subsidiary of PacifiCare, founded in 1993 by pharmacists who recognize the treatment value of prescription medications. Prescriptions Solutions provides mail order and other pharmacy services to over 50,000 pharmacies nationwide.

The PMO at Prescriptions Solutions has clearly identified its purpose within the organization in terms of vision, mission, purpose and strategy. As you can see, the theme focuses on delivering value to the organization and the customer base at large.

Vision: Create a center of excellence for project management that makes a significant contribution towards Prescription Solutions being recognized as one of the top pharmacy benefit management companies in the country.

Mission: Alignment of information systems projects and resources to business goals and tactical projects.

Purpose: Provide added value based on the quantity, quality and predictability of our results including:

- Project management of critical projects,
- Project portfolio management,
- Support for budgeting, strategic planning and metrics,
- Project management training, mentoring and consulting services.

Strategy: Create a partnership with the business that is based on key principles including:

- Customer focus/business perspective,
- Standardized PMO methodology,
- Win-win team environment,
- Fostering a culture that includes respectful interactions, continuous learning, creative thinking, open communications, task accountability, calculated risk taking, objective decision making, and management by objectives.

Prescriptions Solutions is currently focused on the Medicare changes for 2006. Medicare and its changes are very timely subjects. Some of us may currently be eligible for Medicare, know someone who is eligible for Medicare, or are planning to become eligible someday. Understanding what it is and what it means to you and your family is very important.

Medicare was started four decades ago by President Lyndon B. Johnson. At that time, 30 percent of retired people lived at the poverty level. Social Security was available, but no health insurance was provided. Medicare was created and made generally available at age 65 as an alternative to private health insurance or depletion of the "nest egg."

So after 40 plus years, we are looking at some changes. Initially, there were three parts to the Medicare program: Parts A, B and C.

Part A is considered "traditional medicare" for seniors from age 65. It covers hospital expenses, which are funded through payroll taxes, general tax revenue, and cost sharing with the senior. The hospital must accept the government rate. In general, no premium is required if the patient is working prior to retirement age.



Kim Fields, PMP welcomes December speaker Robert "Bo" Kehrer, PMP.

Part B is optional for Part A members and covers doctor outpatient expenses and is funded by general tax revenue and cost sharing with the senior. Prescription medications are **not** included.

Part C is an added program for those who have Parts A and B. It is basically a private health plan for Medicare members. It covers hospital, doctor and, in some plans, drugs, funded by the general tax revenue and cost sharing with the senior. There is a

managed care component to the program, which includes medical practice patterns and prior authorization.

So why change? As you can probably imagine, as the baby boomers age, the situation with Medicare has changed. For Social Security, the ratio of workers to retirees went from 20 workers to one retiree to three workers to one retiree. It is expected that by 2018, more benefits will be paid out than taken in.

For Medicare Parts A and B, there are currently 34 million members, and Part C has over seven million members. The poverty level for seniors has decreased from 30 percent to ten percent; however, more benefits were paid out than taken in this past year. A critical problem is that the drug costs not covered by Medicare are causing retirees to remain at poverty level.

In addition, there are other issues affecting the need for change in our Medicare system. They are:

- Medical inflation is currently seven percent per year.
- Growth in prescription drug costs will increase 20 to 30 percent over the next few years.
- New technology and treatments are probably not covered by current Medicare plans.
- Increased demand for health care
- Aging population
- Uninsured population exceeds 44 million.
- Medicare membership is growing (see chart 1 on page 8).
- Cost per recipient per year is increasing (see chart 2 on page 8).
- Medicare percentage of federal budget is growing (see chart 3 on page 8).

So what's new for 2006? Medicare Part D!

Continued on page 8

December Meeting Review Continued from page 7

Chart 1: Medicare membership is growing.

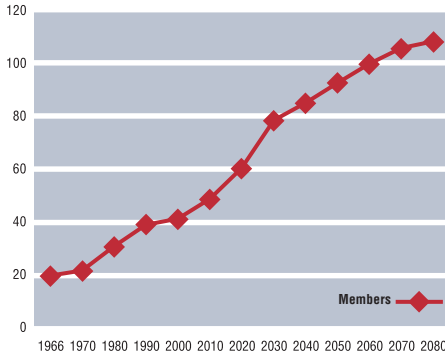


Chart 2: Cost per recipient per year is growing.

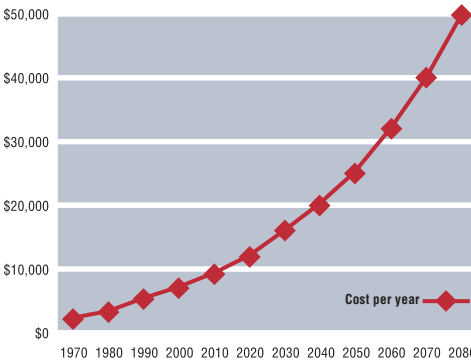
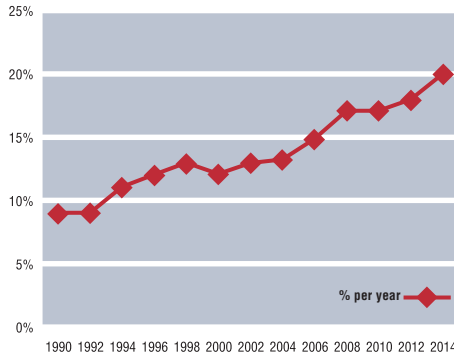


Chart 3: Medicare percentage of federal budget is growing.



Part D is an optional program for Parts A and B members beginning in January 2006. It is a prescription drug program (PDP). It, too, is funded through the general tax revenues with individual cost sharing with a managed care component. It is a little more complex than Parts A, B, and C, in that coverage will change based upon the amount and types of prescription drugs needed. The chart below shows how the government will subsidize the costs to the participant.

In addition to options available from the government, organizations like Prescriptions Solutions have developed modified programs available to the consumer, further complicating the process of choosing what is best for you.

To understand more, see www.Medicare.gov for comparisons or for information on Prescriptions Solutions, see www.prescriptionsolutions.com.

So what is beyond Part C? The government is considering several other options, such as:

- Continue drug discount plan
- Restructure Medicare to a catastrophic program
- Expand Part C to cover more members
- Keep people in private plans
- Will increased Rx reduce Medicare medical costs?
- Other choices for entitlement spending?

Prescriptions Solutions' challenge as an organization is to stay abreast of these changes and support their delivery.

STANDARD PLAN DESIGN from CMS

	\$32.20/mo premium	100%	25%	100%	5%
			75%		95%
	Deductible	Low Tier	Donut Hole	High Tier	
Drug expense	\$250	\$2250	\$5100	\$5100 +	
Out of pocket	\$250	\$750	\$3600	\$3600 + 5%	
Plan payment	\$0	\$1500	\$1500	\$1500 + 95%	

OUT OF POCKET
PLAN PAYS

It is clear to me that although many of us consider ourselves IT professionals, it is extremely important in the success of your company and your career to be knowledgeable of the business you support. It is obvious to me that Robert "Bo" Kehrer has a firm handle on the Medicare environment and understands what needs to occur in his organization in order to support the changing needs of our country.

Great job, Bo!
Diane Altwies, PMP

At the December Meeting



Above: Socializing, networking and checking in at the December dinner meeting. Right: New PMPs are recognized.



Below: New PMP Pattie Hall receives a commemorative coffee mug from Director at Large Victoria Flanagan.



DECEMBER ADVANCED TOPIC SEMINAR REVIEW

ITIL for Project Managers

Is the design and construction of a house of LEGO® bricks one of your projects for 2006? For the PMI-OC chapter members who attended the December 3rd advanced topics seminar, "ITIL for Project Managers," such a project was the focus of a role-playing exercise designed to emphasize two of the components of the ITIL (IT Infrastructure Library): service delivery and service support.

Robert Perrine, PMP, of Ameriquest Capital Corporation, is an ITIL-certified service master (ITIL-SM). Robert presented his expertise and related real-world experience on this subject.

The ITIL, or the Information Technology Infrastructure Library, is a framework for delivering services and conducting operations. It is also a *de facto* standard of governance which is quickly and widely being adopted by IT organizations in the United States. The ISO 9000 governing body is integrating ITIL into an update.

ITIL is about *processes*; the ITIL can be used as a tool to manage complicated operating environments and processes. Companies are under increased government scrutiny and regulation because of the recent corporate accounting scandals; ITIL can assist management in their efforts to comply with regulatory requirements under the Sarbanes-Oxley Act (SOX), since processes are an integral component of SOX compliance. While SOX is an American regulatory standard, ITIL is a British regulatory standard.

The ITIL framework can be characterized as a comprehensive body of processes or knowledge areas. The British government created the ITIL in the 1980s, publishing a ten book set of core processes, which are consolidated from existing guides. The ITIL processes are: Service Level Management, IT Financial Management, Capacity Management, IT Service Continuity Management, Availability Management, Incident Management, Problem Management, Change Management, Configuration Management, and Release Management.

In this seminar, service delivery and service support were emphasized. Robert states that "ITIL is all about operations; while we use projects to *change* operations, operations is about repetition and consistency." ITIL and project management are two distinct disciplines, though the two can coexist within an enterprise.

The overarching ROI or benefits of adopting the ITIL framework is increased operational efficiency and a higher quality of service. Hence, the following equations:

Operational Efficiency + Quality of Service → Customer Satisfaction
Customer Satisfaction = Expectation - Perception

Other important benefits of adopting ITIL are:

- Improved alignment with internal and external stakeholders
- Improved productivity through best practices and standardization of policies and processes
- Increased percentage of successful implementations
- Reduction of costs through standardization of processes
- Improved communication between stakeholders
- Clearly defined roles and responsibilities
- Increased visibility to data
- Reporting
- Single point of contact

These benefits will facilitate operational efficiency; therefore, customer satisfaction will increase.

As previously mentioned, the seminar featured an exercise in which breakout teams were assigned the task of designing and building a house of made of LEGO® bricks. The specific design requirements were: (1) six layers of bricks, (2) pitched roof, (3) one door, and (4) one window. In addition, the design must be structurally sound and esthetically pleasing. The ITIL processes were employed to accomplish the task. Integral to the execution of the ITIL processes are the roles and responsibilities assigned to each team member. Among the roles played by team members were service level manager,

service desk manager, customer, and users. The exercise challenged the PMI-OC members, and their competitive natures "kicked in gear" as the three teams sought to accomplish the assignment within their given roles. The take-away from the exercise was the importance of the team and the assigned roles which are important to successful execution.

Because of the increasing acceptance and adoption of ITIL in the United States, more companies require ITIL knowledge and ITIL Foundation certification of their employees.

There are three levels of certification: Foundation, Practitioner, and Master. The Foundation certification is a prerequisite for the Practitioner and Master certification levels. To attain Master Certification level, a candidate is required to pass two three-hour exams. The testing authority is based in The Netherlands; the licensed authority for North America is Loyalist College in Canada. Efforts are underway to allow the United States authorization to run ITIL certification tests. More information can be obtained by contacting the Information Technology Service Management Forum (ITSMF) chapters in the Los Angeles and San Diego areas.

Steven Fernandez

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UC Riverside offers a six-course certificate program in Project Management. Classes for Winter quarter are:

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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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UPCOMING ADVANCED TOPICS SEMINARS

January 7, 2006

Earned Value Management and ANSI-Standard 748: What is the Relationship?

Presented by Quentin Fleming and Janice Y. Preston, MBA, CPA, PMP

Your company receives a request for proposal which reads in part, "The winning contractor must implement an earned value management system in accordance with ANSI-Standard 748." Also, the same RFP references a new federal acquisition regulation (FAR) clause that sets forth the same requirement. What does this requirement mean to your company?

This seminar will present an overview of earned value management and then go into a detailed review of the requirements contained in ANSI-Standard 748. All 32 criteria will be reviewed. Then you will be broken up into teams where you will collectively choose which criteria you feel are most critical to the EVM process. At the end, you will understand the requirements of EVM and ANSI-Standard 748.

Note: Since some of this material is from the UCI Course "Earned Value Project Management," Management 474.7, anyone who has taken this UCI class may not need to attend this session.

Seminar cost includes the PMI® book "Earned Value Project Management," Second Edition. This book retails for \$34.95 from PMI. Sign up early; class size is limited.

When: Saturday, January 7, 2006

Time: 8:00 a.m. to 12:00 p.m.

Location: UCI, Building H
(Building 236 on UCI map)
Room 168-70

Parking: Social Science Parking Structure
\$7 a day

For more parking information go to
www.parking.uci.edu/permits/guestparking.cfm.

Register: www.pmi-oc.org

Questions: advancedtopics@pmi-oc.org

PDUs: There are four PDUs for this event.

Cost: \$35 for PMI members
\$40 for non-members

At the Door: \$50 for members and non-members

Quentin Fleming, PMI-OC Fellow is a solo practicing management consultant who specializes in earned value and procurement management. He was on the eight person core team that updated PMBOK® Second Edition released in 2000 and has written eight published books on project management. More detail can be found on his website, www.QuentinF.com.

Janice Preston, a principal with Vista Performance Group since 1991, has been managing projects for more than 20 years, as well as consulting and teaching about project risk management, earned value, cost control, procurement, team leadership and communication skills for many well-known companies in diverse industries.

Contact Janice at 949-859-7004, or jypreston@vistapg.com, or at her website, www.vistaperformancegroup.com.

February 4, 2006

Help! I'm Stuck in a Meeting, and They Ran Out of Donuts: How to Hold Effective Meetings

Presented by Steve Kaye, Ph.D.

Meetings are an essential part of your business. When you use them for planning, they determine your future. When you use them to find solutions, they determine your profitability. Yet, businesses waste an average of 20 percent of their professional payroll on bad meetings. This program shows how to hold meetings that end with results others support. You will learn how to hold fewer, shorter, more effective meetings. This program is a must if you want to look like a leader in your meetings.

Specifically, you will learn how to:

- Set up and plan meetings that produce results;
- Use group activities that make methodical progress toward a result;
- Select activities that match the type of result wanted from the meeting;
- Help groups reach agreements that everyone will support;
- Find creative and realistic solutions;
- Manage discussions so that everyone participates;
- Maximize everyone's participation in a meeting;
- Maintain control of meetings;
- Capture action items so that something happens after the meeting;
- Hold fewer, shorter, more productive meetings.



Steve Kaye, Ph.D. helps leaders hold meetings that make plans, reach agreements, and find solutions. His facilitation produces results that people will support. And his innovative workshops have informed and inspired people nationwide since 1992.

Steve is a Certified Professional Facilitator, author, and professional speaker. He has written two books and a booklet on effective meetings, published over 190 articles on leadership skills, and appeared on radio and TV. He has a Ph.D. in chemical engineering and 20 years of experience working for major corporations.

When: Saturday, February 4, 2006

Time: 8:00 a.m. to 12:00 p.m.

Other: See above

THURSDAY, JANUARY 19, 2006 NEW MEMBER ORIENTATION MEETING

WELCOME to Project Management Institute – Orange County Chapter, Inc. You have taken the first step toward managing your professional career network and developing relationships with local, knowledgeable project managers and like-minded professionals.

You are invited to join us for an informal orientation and networking session. Meet the PMI-OC Board of Directors and your fellow members. Let us show you the value added benefits, professional development opportunities, and programs PMI-OC offers its members. The number one benefit of your membership in PMI-OC is the vast pool of individuals you can network with. Networking is a powerful way to make new contacts and bolster your access to these resources when you need them. Networking also increases your professionalism and heightens your visibility with others.

We will present a brief overview of the techniques you can use to maximize the time you spend with fellow members. Utilizing the tips and pointers that **Melanie McCarthy** shares will improve your networking skills and enrich the experience measurably.

When:	Thursday, January 19, 2006, 6:00 p.m. – 8:00 p.m. Registration and food start at 6:00 p.m. Program starts at 6:30 p.m.
Where:	UC Irvine. Building 232 Women's Opportunities Center/University Extension A UNEX Rooms C-111. Park in lot SSPS, across from the building, and follow the PMI-OC Event signs. For UCI map: http://today.uci.edu/pdf/UCI_05_Map.pdf . UCI map quadrant D7. Directions from Campus Drive: turn on Stanford into UCI. Parking will be to your left.
Cost:	Food provided at no charge. Parking is \$2.00 an hour.
Register:	www.pmi-oc.org . Please register early; space is limited to the first 50 members.
Questions:	E-mail: membership@pmi-oc.org



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A SPECIAL ADVANCED TOPIC SEMINAR

Unleashing the Leader Within



Dr. Jerry Brightman of The Leadership Group (TLG)

PMI-Orange County is proud to present a unique opportunity for self-discovery and leadership development. You will not want to miss this special full-day Advanced Topic Seminar on **Saturday, February 25th**.

Dr. Jerry Brightman, designer and facilitator of PMI's first four Leadership Institutes, will present a customized workshop that will help you discover and unleash the leader within you to become a better project manager. This program mirrors leadership development programs offered by Fortune 500 companies by providing skill building, active learning sessions, personal development planning, peer networking, and one-on-one discussions.

Topics to be discussed include (1) creating common values, (2) leadership versus management, (3) creating a *leadership touchstone*, (4) exploring organizational behaviors and your role as a leader, (5) leading change, and (6) taking leadership to the next level.

Each attendee will receive a leadership learning journal to capture the experiences of the day and their on-going leadership journeys. A continental breakfast and lunch will be served.

Dr. Jerry Brightman is currently president of The Leadership Group (TLG). TLG is focused on helping leaders and their teams understand and actualize those behaviors that will make them great. Brightman creates and delivers customized leader development programs. In addition to program design and facilitation, Brightman does one-on-one coaching and mentoring, as well as presenting a number of speeches around the world related to leadership development, team learning, change management, dialogue, systems thinking and organizational learning.

Since founding TLG in 1996, Brightman has done work in Singapore, Italy, Russia, Colombia, Canada, the U.K., France, Costa Rica, Mexico, Argentina, Brazil, Venezuela, and throughout the U.S. He has worked with a number of prestigious global clients, including Wendy's International, Xerox, GlaxoSmithKline, GE Medical Systems, the Project Management Institute (PMI®), the Center for Creative Leadership, the Boston Consulting Group, the International Institute of Finance, Eli Lilly (Canada), OIE (Italy), Leonisa (Colombia), Sanofi-Synthelabo (France), and the Schott Foundation.

Brightman holds a Doctorate in Business degree from George Washington University, an MBA from American University, and a BA in Economics from Clark University.

Location: Wyndham Orange County Airport
3350 Avenue of the Arts, Costa Mesa, CA, 92626
714-751-5100

Directions: Take 405, exit at Bristol, turn onto Anton Blvd., left on Avenue of the Arts

Date/Time: **Saturday, February 25th, 8:00 a.m. to 5:00 p.m.**

Register: programs@pmi-oc.org.

PDU: There are eight (8) PDUs for this event.

Cost: In Advance: \$75 for PMI-OC members/\$80 for non-members.
At-the-Door: \$100 for PMI-OC members and non-members.

Cancellation Policy: Members and non-members who cancel their reservation for an Advanced Topics Seminar no later than 9:00 p.m. of the Thursday prior to the seminar will receive a refund. Members and non-members who make a reservation and do not cancel in due time or do not attend the seminar will not receive any refund.

Walk-in Policy: We welcome walk-ins. However, pre-registered attendees have preference. If you are not pre-registered, you may be turned away due to lack of seating, or you may have to give up your seat to a pre-registered attendee, even if they arrive after you have.

Scholarships Available

The 2006 PMI® Education Scholarship application is posted on the PMI Educational Foundation website, and the foundation is 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 sub-mission 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 extra-curricular 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 Merikkbayat**. 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.

Congratulations, Pornegin!

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2006

PMI PROJECT OF THE YEAR AWARD

It is not too late for you and your organization to showcase your excellence in project planning and execution!



All projects, regardless of size and industry, are encouraged to participate. PMI affiliation is not necessary. Other professional associations are invited to encourage participation.

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**.

WANT TO BE PMP® CERTIFIED?

Studying for the PMP Exam?
Need qualifying education contact hours?

PMI Orange County Chapter Announces its 2006 Winter Course



PMP EXAM PREPARATION WORKSHOP

Six Saturdays Beginning January 28, 2006

This workshop is intended for anyone who wishes to achieve their PMP certification, who meets the requirements as identified by PMI® (see <http://www.pmi.org/certification>), AND who has studied recommended PMI project management literature, specifically, the third edition of the PMBOK® Guide.

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: Santiago Canyon College AND Holiday Inn
8045 East Chapman
Orange, CA 92869

26205 La Paz Road
Laguna Hills, CA 92653

Cost: The workshop fee is per participant, payable at the time of registration. Classes fill very fast and cannot exceed 60 participants. Reserve your space now to guarantee a seat.

Register by January 20th to receive a special discount!

- PMI Member: \$575 prior to January 20, \$625 after January 20
- Non Member: \$725 prior to January 20, \$775 after January 20

Register: 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, January 10, 2006

Program: **Now What Do I Say? The Human Side of Communication**
Steve Kaye, Ph.D.

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**

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

Featured Presentation Only (Members and Non-Members)

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

Make your reservation by 9:00 p.m. on Sunday, January 8, to obtain the "in advance" price. Reservations made after 9:00 p.m. on January 8 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, January 8, or anyone who makes a reservation and does not attend, will not receive any refunds.

PMI-OC BREAKFAST ROUNDTABLES

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

PMO-Local Interest Group (LIG)

Tuesday, January 17, 2006

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

2006 PMI-OC Registration Fees



Due to increased costs, PMI-OC will be changing the registration fees for both the advanced topics seminars and dinner meetings.

Advanced Topics Seminars

See page 11. Beginning with the **January 7, 2006 Advanced Topic Seminar**, the fees for a half-day seminar will be:

- **In Advance:**
\$35 members / \$40 non-members
- **At the Door:**
\$50 members and non-members

Dinner Meetings

Beginning with the **February 7, 2006 dinner meeting**, the fees for the monthly meeting will be:

- **In Advance:**
\$30 members / \$35 non-members
- **At the Door:**
\$40 members and non-members
- **Presentation Only:**
\$15 both members and non-members for both in advance and at the door registration

PMI-OC strives to provide high quality networking and educational programming at an affordable price for its members. These fee increases will allow us to continue offering these excellent programs without incurring monetary losses. Please contact Programs Director **Kristine Hayes Munson, PMP** at programs@pmi-oc.org if you have any questions.

Answers to PMP® Exam Questions

From page 4

- 1. c. Fixed unit price**
PMBOK® 2004, paragraph 12.1.2.3, pages 277 to 278 [Planning]
- 2. a. Cost estimating templates**
PMBOK® 2004, paragraphs 7.1.1.2 and 7.1.2, pages 162 to 166 [Planning]
Cost estimating templates is an input, not a tool or technique.
- 3. c. External dependency**
PMBOK® 2004, paragraphs 6.2.2.4 and 6.2.2.5, pages 133 and 134 [Planning]
- 4. b. The critical path is the same as the critical chain.**
PMBOK® 2004, paragraph 6.5.2, pages 145 and 148 [Planning]

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the chapter or the Project Management Institute.

Subscription rate for non-members is \$15.00 per year for individuals with U.S. mailing addresses.

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PMI-OC, Inc.
Attn: Naomi Iseri, PMP
editor@pmi-oc.org

COMING EVENTS

-  **JANUARY 7 ADVANCED TOPIC SEMINAR**
"Earned Value Management and ANSI-Standard 748: What's the Relationship?"
Quentin Fleming and Janice Y. Preston, MBA, CPA, PMP
Location: UCI
-  **JANUARY 10 DINNER MEETING**
"Now What Do I Say? The Human Side of Communications"
Steve Kaye, Ph.D.
-  **JANUARY 12 BREAKFAST ROUNDTABLE**
Breakfast with Your SOX On
-  **JANUARY 17 BREAKFAST ROUNDTABLE**
PMO-Local Interest Group (LIG) Breakfast Roundtable
-  **JANUARY 19 NEW MEMBER ORIENTATION MEETING**
Location: UCI
-  **JANUARY 27 PMI® PROJECT OF THE YEAR**
Submission Deadline
-  **JANUARY 28 WINTER 2006 PMP® WORKSHOP**
Register at www.pmi-oc.org
-  **FEBRUARY 4 ADVANCED TOPIC SEMINAR**
"Help! I'm Stuck in a Meeting and They Ran Out of Donuts"
Steve Kaye, Ph.D.
Location: UCI
-  **FEBRUARY 7 DINNER MEETING**
"Strategic Portfolio Management: A Blueprint for Successful Implementation"
Steve Garfein
Wyndham Orange County Airport **Ballroom** (Please note special date and room)
-  **FEBRUARY 25 SPECIAL FULL-DAY ADVANCED TOPIC SEMINAR**
"Unleashing the Leader Within"
Dr. Jerry Brightman
Location: Wyndham Orange County Airport
See page 13.

LEGEND

-  PMI-OC Event
-  PMI® Event
-  Recommended Event
-  PMI-OC Sponsored Event

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



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