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FEBRUARY 7TH PMI-OC DINNER MEETING

Strategic Portfolio Management: A Blueprint for Successful Implementation

By Steve Garfein

Over the last five years, server-based enterprise project management (EPM) systems have been introduced by a number of software companies. To date, the majority of these EPM implementations have been in IT departments. The infrastructure is ready; the PMP® population is growing rapidly; however, a major challenge remains: to increase executive awareness of this convergence in capabilities that can bring enterprise strategy formulation and execution to new levels of excellence.

This presentation will offer a blueprint for successful implementation of a strategic portfolio management system and suggest ways that executive leadership awareness of these capabilities can be increased.

Steve Garfein was a member of the management team that developed the Apache helicopter at the Hughes Helicopter Company (now a part of Boeing), where he established and managed the Hughes Enterprise Project Management Office (EPMO). In 1979, Steve founded RPM Systems Corporation, and for more than twenty-five years Steve and RPM have been helping organizations implement enterprise project management systems. In May of 1988, RPM began working with Microsoft on the development of what became Microsoft Project for Windows 1.0, and the firm continues to work with Microsoft today on future desktop and server-based EPM solutions.

Steve earned a BS from UCLA and an Executive MBA, with honors, from USC. He has lectured on portfolio strategy and enterprise project management at Oxford and Stanford Universities and is a frequent presenter at local PMI® chapters and at PMI Global Congresses.
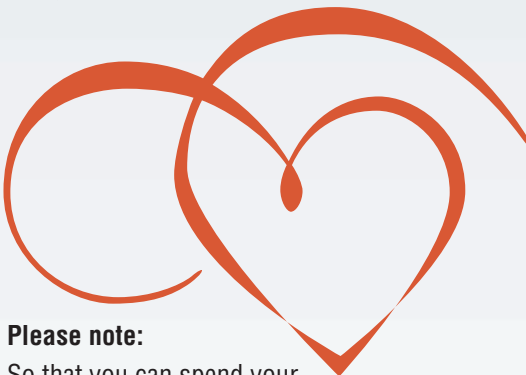
Please note:

So that you can spend your Valentine's Day with your own Valentine, PMI-OC's February dinner meeting date has changed to February 7, the **first**, instead of the second, Tuesday in February.

Vendor Showcase: **PROJECTinsight**
www.projectinsight.net. See ad on page 3.

INSIDE THIS ISSUE

Test Your Knowledge on PMP® Exam Questions

1. One of several key features/functions supported by a project management office (PMO) is:

   a. Contracts and commercial law
   b. Identification and development of project management methodology, best practices and standards
   c. Strategic planning, tactical planning, and operational planning
   d. Financial management and accounting.

2. The PMBOK® describes five process groups. Which of the following is not a process group?

   a. Initiating
   b. Auditing and evaluating
   c. Monitoring and controlling
   d. Planning

3. A project stakeholder is/are:

   a. An integrated project team
   b. The project manager assigned to the project
   c. Individuals and organizations actively involved in or affected by the outcome of a project
   d. Members of senior management of the organization

4. Which type of contract may transfer the most risk of cost growth to the seller?

   a. Cost plus fixed fee.
   b. Fixed price incentive fee
   c. Cost plus a percentage of cost fee
   d. Firm fixed price

THE CHAIR'S COLUMN
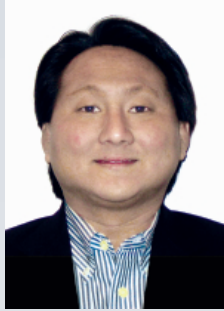
2006: The Road Ahead

Last month, I discussed a bit about myself, where the chapter has been, and an insight about where we want to go. To that end, I want to expand further on our goals for 2006.

PMI-OC Purpose Statement:
Providing Members Quality Professional Development and Networking Opportunities

This will be a recurring theme for us throughout the year, helping us stay focused on the areas that are most important to you, our members.

The Orange County Chapter has made great strides in the number and types of professional development activities that it offers to its members. Just a few years ago, the main professional development activity and networking event for members was the monthly dinner meeting, and the main professional development communication piece was the monthly newsletter. We also provided a PMP® workshop to assist others with their preparation for taking the PMP exam.

Since that time, the diversity and number of offerings has simply exploded to keep up with our chapter member population and the growing needs of different types of audiences. Taking a quick look at our current chapter calendar, the following events are scheduled for the next two months:

- Monthly dinner meetings
- Monthly advanced topic seminars
- Bi-monthly new member orientation (and soon to be added volunteer orientation)
- Monthly SOX breakfast meeting
- Monthly PMO-LIG (local interest group) breakfast meeting
- PMP workshop sessions (six week courses, held three times per year in two concurrent sessions)
- Special events, like the all-day event, "Unleashing the Leader Within," on February 25. See page 5.

How many of you knew about these chapter activities? Now that you know, I encourage everyone to try to attend at least one of these events in the next couple of months. If you currently attend one of our events, I challenge you to try out a different event.

Scheduling difficulties? We have morning, evening, and weekend events. Different interests? We have focused discussions, general overviews, in-depth presentations, and training to help prepare you for the PMP exam. New to PMI® or want to re-engage in chapter activities? We have a session for you as well.

Speaking about our events, another goal for this year is to expand our project management topics to include events that help our members with both hard skills and soft skills, in both management and leadership. As project managers, we do tasks like setting up plans, monitoring schedules, facilitating meetings and group sessions, tracking budgets, and assessing project risks. As leaders of our project teams, we need to mentor team members, communicate effectively within the team and with the rest of the organization, and furnish the team leadership and inspiration. You will see future PMI-OC events addressing these areas, like the all-day seminar this month, that will help provide a better balance of professional development opportunities.

Another area we will pursue is greater collaboration with the SIGs (specific interest groups). How many of you are currently a member of a SIG? What is a SIG? SIGs are communities of members who share a common interest that is not bound by a geographical area. Some share industry interests, like the automotive and government SIGs; others share organizational interests, like the HR and IS SIGs. Last year at the PMI Global Congress, I started to contact representatives from different SIGs. Watch for us to bring you SIG information in the near future.

VOLUNTEER OF THE MONTH

Catherine Ford, PMP Honored

A resolution was unanimously passed at the December 2005 board meeting of your chapter designating **Catherine Ford, PMP** as the **Volunteer of the Month** for **January 2006.**

PM-OC Volunteer Coordinator **Sylvan Finestone, PMP** honored Catherine at our January dinner by presenting her with a Certificate of Appreciation.

Catherine has been a member of our chapter for three years. She earned her PMP® in January 2001 and has volunteered her services as Assistant Treasurer for Registration for 2004 and 2005. She has attended chapter events during that time, including the PMInAction event in August of last year, where she directed all registration activities. Many times you have all seen her cheerfully doing the registration work and faithfully remaining in her post waiting for that last attendee to arrive.

Catherine is currently Director of Information Services for the California Regional Operations Center for the Apartment Investment and Management Company (AIMCO), the largest real estate investment trust (REIT) in the United States. She is responsible for 38 properties in California, training staff to use the corporate software and overseeing hardware issues at all locations. She interfaces between corporate and the regional operations center for all computer related issues.

Catherine will be unable to join us in February; she will be in Africa, specifically Kenya and Tanzania, participating in a safari. We look forward to her rejoining us in March.

Sylvan Finestone, PMP

The Chair's Column

The chapter is working diligently to continue delivering programs and events that further your professional and personal growth and provide networking opportunities and social contacts.

We continue to look for ways to improve service to our members and to increase the value of your membership. Although I have met many of you at different meetings and seminars, there are many more whom I have yet to meet. Please be sure to stop by and introduce yourself or drop me an e-mail. I look forward to meeting you.

*Glen Fujimoto
Chair/President*

PAGE 4 • FEBRUARY 2006 MILESTONES

A PMI-OC Exclusive Event!

A SPECIAL ALL-DAY 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 all-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. Dr. Brightman creates and delivers customized leader development programs. In addition to program design and facilitation, Dr. 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, Dr. 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.

Dr. 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., then left on Avenue of the Arts

Date/Time:
Saturday, February 25, 2006
8:00 a.m. to 5:00 p.m.

Register:
programs@pmi-oc.org.

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

Cost:
In Advance:
Before 9:00 p.m., Tuesday, Feburary 21
$75 for PMI-OC members
$80 for non-members

At-the-Door:
After 9:00 p.m., Tuesday, Feburary 21
$100 for members and non-members

Cancellation Policy: Members and non-members who cancel their reservations **before** 9:00 p.m. on Tuesday, Feburary 21, will receive refunds.

Members and non-members who cancel **after** 9:00 p.m. on Tuesday, February 21, will not receive refunds.

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.

Now What Do I Say? The Human Side of Communication

You pay meticulous attention to detail, could organize a beehive, and can juggle eleven bottles of nitroglycerine, but these are not the reasons you became a project manager. They are the reasons that you became a **good** project manager. Everyone else is content with a vision statement; you think in work breakdown structure. In short, you use the analytical half of your brain. You don't need the "touchy-feely" stuff.

Life for the project manager is seldom that simple and tidy. The fact is that the "touchy-feely" stuff includes such skills as **communication**. You know how important communication is when you're the recipient. It's equally important when you are doing the communicating. Project management needs both halves of your brain.

Kim Fields, PMP welcomes January speaker Steve Kaye.

Enter **Steve Kaye**, published author and poet, a Ph.D. in chemical engineering and an excellent teacher on the subject of communications. He began his talk with an example of how analytic thinking alone can lead you astray. See if this sounds familiar.

Each year the company would conduct an employee survey. This survey came back with a maddening result; the number one complaint was "management does not communicate with us." The executives met, and it was decided to launch a company newsletter, just loaded with all sorts of communication.

The year went by; the survey was issued again, with precisely the same result. Another executive review decided that (obviously) the newsletter needed to be improved. More money was spent; town hall meetings were held (and so on).

When the survey came out the third year, guess what? Yep. "Management does not communicate with us." Another mass mulling of the masterminds started with, "Who put this question on the survey?" "Who" was fired; a consultant hired. The consultant talked to the employees; just what did they mean by that? The answer, in 97 percent of the people, asked management to "tell me what my job is."

Steve puts it this way, "The foundation of good communication is *the perfection of common sense, goodness and compassion*."

Steve put a challenge to the audience. Just how would you let others know what they are expected to do? Why the failure? The answer, in a word, is **respect**. To illustrate this, Steve told us how the consultant managed to get results where the survey didn't.

Here's how:

• He arrived 45 minutes early. He didn't make the employees wait for him to enter; rather, he respected their time.

• He spent that time in small talk in the office. He introduced himself, engaged in small talk, and generally showed an interest in their ideas.

Charles Revson, the founder of Revlon Cosmetics, once said, "We don't sell cosmetics. We sell hope." When this consultant was through, he gave the employees some hope that their voices would really be heard. To generate that hope, the employee needs to be respected; otherwise, the communication is dust in the wind.

Just how would you let others know what they are expected to do? The answer, in a word, is respect.

OK, Steve, what happens if you don't respect them? You can predict that the employees will go through four stages:

1. There is a real loss of freedom. The employee understands that "thinking outside the box" is not permitted. His ideas, therefore, have no way to get from hope to installation. He's "inside the box" to stay.

2. That leads to a climate of fear. The employee may be asked for his ideas, but his perception will be that the question is asked to provide a list of good reasons for his layoff notice. Every communication from management now ends with, "I wonder what they mean by that?"

3. It doesn't take long for fear to grow into anger. To know that your ideas are worthwhile, to be certain you have a better way to do the job, and to know that your ideas *never* will be heard; these produce the cold anger of frozen hope.

4. Finally, malicious obedience sets in. The employees do what they are told and think no more. Management is frustrated by the lack of productivity, but has no way to break the paradigm.

Is there a way to avoid this? Yes. You need to create a safe environment, a channel which will allow positive communication, allowing management to tell the employees what is desired without implicit flogging, and also allowing employees to bring forward their ideas. How do you do that in a meeting?

• Smile. It's hard to be negative when your face is positive. Words spoken with a smile are more readily received. Steve had us test this by closing our eyes and listening to a partner speaking, once with a smile and once

Steve Kaye shares some of his communication materials.

January Meeting Revew

with a frown. The difference was obvious and easily understood.

• Talk friendly. Avoid the use of "not" or, even worse, "but." Put your comments into positive language. For example, saying "Yes, but…" is really a negative. Say "yes" in positive language; then ask the employee to improve on it. (He knows the "but" side too, but this shows the respect you have for him.)

Much of what Steve taught us is indeed common sense. The audience understood that. They also understood that sometimes an old idea that works is a good idea. Steve reminded us in a practical way of the value of good communication skills.

John Hendershot, PMP

AT THE JANUARY MEETING

Above:
Checking in and networking

Left and Below: *New PMPs receive commemorative mugs from* ***Ed Walker, PMI-OC Fellow*** *and congratulations from all.*

Above and left:
Raffle Coordinator ***Vempati Chandrasekhar, PMP*** *presents prizes to some of the lucky winners.*

Photos: ***Shirley Goodwin, PMP***

Earned Value Management and ANSI Standard 748

Project Management Professionals **Quentin Fleming** and **Janice Preston** spoke on the relationship between Earned Value Management (EVM) and ANSI-EIA Standard 748 at the Advanced Topic Seminar on January 7th. The seminar presented an overview of EVM and reviewed the 32 requirements for ANSI-EIA Standard 748.

The primary objective of the seminar was to impart an understanding of the requirements of EVM and ANSI Standard 748. To crystallize the audience's knowledge of the subject, Quentin and Janice devised a 30 minute exercise in which five breakout teams from the audience selected the 12 most important criteria of their organization's projects and presented their findings to "management." There was little variance among the breakout teams in the 12 criteria selected as most critical to project managers when compared to over 200 other teams that had participated in this exercise. The 12 dominant criteria are listed later in this article. Each seminar attendee received a copy of Quentin's book (co-authored by Joel M. Koppelman), *Earned Value Project Management.*

During your career as a project management professional, you may find yourself assessing a request for proposal (RFP) in which a key component is the "implementation of an earned value management system in compliance with the requirements of ANSI-EIA (American National Standards Institute-Electronics Industry Association) Standard 748."

Earned value management is defined as "a management methodology for integrating scope, schedule, and resources, and for objectively measuring project performance . . ." Earned value management focuses on "percentage complete, requiring an integrated baseline and accurate measurement," thus enabling the accurate forecasting of project completion.

The ANSI-EIA Standard 748 was issued in July 1998 and has 32 defined criteria. The standard is a rewrite of the 35 defined standards in the Cost/Schedule Control Systems Criteria (S/SCSC) that was developed in 1967 to enable closer oversight of cost reimbursable contracts.

Earned value management is simply "fundamental" project management, including the following components: (1) Define and decompose 100% project scope; (2) Plan, schedule, and budget to form control action plans (CAP); (3) Assign performance of CAPs to the functions; (4) Monitor performance and forecast final results; and (5) Manage changes and take corrective actions.

There are three dimensions to EVM: *Planned Value, Earned Value, and Actual Costs.* In the *Planned Value* component, two questions must be addressed: "What work has been authorized?" and "What is the budget for the work authorized?" In the *Earned Value* component, the following questions must be addressed: "What work has been accomplished?" and "What was the budget for work accomplished?" In the *Actual Costs* component, the "actual costs for the earned value" are addressed.

The challenge of earned value management is isolating the cost variance (CV) and schedule variance (SV). Project managers are familiar with the following equations from PMBOK® 3 (page 173).

- Earned value less the planned value = SV
- Earned value less the actual costs = CV
- Earned value divided by the planned value = Schedule Performance Index (SPI)
- Earned value divided by the actual costs = Cost Performance Index (CPI)

The 32 defined earned value management criteria fall into five categories: (1) organization, (2) planning and budgeting, (3) accounting, (4) analysis, and (5) revisions to baseline.

The Earned Value Management Criteria by Category

The *organization* category contains five criteria whose purpose is to scope the total project (including make or buy), integrate with a work breakdown structure (WBS), create control account plans (CAPs), and assign CAPs to a function for performance.

1. Define the project scope
2. Assign scope to an organization
3. Integrated management system
4. Indirect cost management
5. Integration of project and organization

The problems with these criteria include inadequate project definition and rejection of project WBS by functions.

The *planning and budgeting* category contains ten criteria whose purpose is to employ a formal scheduling and budgeting system and form a project measurement baseline.

6. A formal scheduling system
7. Indicators to measure progress
8. Performance measurement baseline

9. Budget all the authorized work
10. Budget small/short packages
11. Control account (CAP) budgets
12. Level of effort (LOE) budgets
13. Overhead budget control
14. Management reserves (MR) and undistributed budget (UB)
15. Contract budget base (CBB)

The problems with these criteria include lack of organizational discipline and front end rubber baselines.

The *accounting* category is comprised of six criteria whose purpose is to record all project costs as consumed or incurred, synchronize accounting data monthly to relate the schedule variance and the cost variance, and to measure direct labor hours.

16. Recording of direct costs
    Summation of direct costs:
17. When a work breakdown structure is used, summarize direct costs from the control accounts into the work breakdown structure without allocation of a single control account to two or more work breakdown structure elements.
18. Summarize direct costs from the control accounts into the contractor's organizational elements without allocation of a single control account to two or more organizational elements.
19. Recording of indirect costs
20. Accounting for unit and lot costs
21. Material accounting requirements

The problems with these criteria include difficulty measuring earned value for material costs and difficulty of performing "price" and "usage" variances.

The *analysis* category is comprised of six criteria whose purpose is to monitor performance against the baseline, analyze variances from the baseline, and forecast the estimate at completion (EAC).

22. Performance of CAPs
23. Project performance analysis
24. Analysis of indirect costs
25. Analysis by WBS and organization
26. Identify management actions
27. Estimates at completion (EAC)

The problems with these criteria include subjective measurement of performance, excessive level of effort (LOE), and management's influence on EAC forecasts.

The *revisions to baseline* category includes five criteria whose purpose is to manage all changes to the project baseline and incorporate changes in a timely manner.

28. Incorporate baseline changes
29. Reconcile to original baseline
30. Prohibit retroactive changes
31. Maintain contract budget baseline
32. Document all baseline changes

The problems with these criteria include work done without authorization, slow incorporation of changes, and poor or no estimate for changes.

As stated at the beginning of this article, there was little variance among the breakout teams from the 12 dominant criteria selected as critical to projects by project managers from over 200 teams. The 12 dominant criteria are:

1. Define the project scope
2. Assign performance responsibility
3. Schedule the defined work
4. Metrics to measure performance
5. Form a baseline
6. Budget all work
7. Direct costs to projects
8. Measure CAP performance
9. Analyze cost/schedule performance
10. Perform periodic EACs
11. Manage changes to baseline
12. Document all changes to baseline

When should the EVM methodology be employed and who should utilize EVM? Quentin states, "Whenever you underwrite the "risks of cost growth." Project managers should employ EVM "on all cost reimbursable type budgets" and "on all fixed-price commitments to (your) management." Project management professionals who employ the EVM methodology are compliant with the 32 criteria of ANSI-EIA Standard 748.

Steven Fernandez

*Photos: **George Meier, PMP***

Answers to PMP® Exam Questions
From page 2

1.b. Identification and development of project management methodology, best practices and standards
PMBOK® 2004, paragraphs 1.5.4 and 1.6.4, pages 15 and 18 [Introduction]. All other choices pertain to general management knowledge and skills.

2.b. Auditing and evaluating
PMBOK® 2004, paragraph 3.2, page 41 [Project Management Processes]

3.c. Individuals and organizations actively involved in or affected by the outcome of a project
PMBOK® 2004, paragraph 2.2, page 24 [Project life cycle and organization]

4.d. Firm fixed price
PMBOK® 2004, paragraph 11.5.2.1, pages 261 and 262 [Planning]

ADVANCED TOPIC SEMINAR

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

Location:
UCI, Building H, Room 168-170
Go to www.uci.edu/campusmap/
Click on "campus map," and see map grid
D8, building 236 in the red area.

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: In Advance
Before 9:00 p.m., Thursday, February 2.
$35 for PMI members
$40 for non-members

Cost: At-the-Door
After 9:00 p.m., Thursday, February 2.
$50 for members and non-members

Cancellation Policy: Members and non-members who cancel their reservations **before** 9:00 p.m. on Thursday, February 2, will receive refunds.

Members and non-members who cancel their reservations **after** 9:00 p.m. on Thursday, February 2, will not receive refunds.

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.

News from Headquarters

PMP named one of ten hottest certifications for 2006.

The Project Management Professional (PMP®) certification was recently ranked fourth in CertCities.com's **Ten Hottest Certifications for 2006**. Winners were announced Wednesday, December 14, 2005, on CertCities.com.

The PMP debuted on the CertCities.com list last year and has since moved from tenth place to fourth place. CertCities looks for certifications it thinks will be the most influential in the upcoming year, will grow the fastest, and will show the true future of IT certification.

Final results are based on CertCities.com's annual reader survey, which asks a diverse group of information technology profes-sionals which certification titles they plan to achieve within the next year. The reader interest score is combined with a "buzz score" from industry experts and contributing editors. View the entire story online at CertCities.com.

Who responded to the 2006 volunteer satisfaction survey?

The volunteer satisfaction survey was sent to 4,000 active PMI® volunteers. Nearly 1,000 surveys were completed. Here is a look at who responded to the survey.

• The majority of respondents serve components (54 percent) and PMI Standards Program teams (13 percent). Other volunteer roles include, but are not limited to, the PMI Board of Directors and standing committees (11 percent), and Member Advisory Groups (3 percent).
• Fifty percent of all respondents have held or currently hold at least one other volunteer role within PMI.
• Respondents are a mix of practitioners, consultants to the profession and executives.
• Thirteen percent are self-employed, retired or currently unemployed.
• The geographic spread of volunteers is similar to that of PMI's membership, with a growing percentage of volunteers who reside outside of North America.
• Over 80 percent of respondents hold the PMP credential, an increase over the 2004 survey findings.
• Sixty percent spend one to ten hours per month on volunteer activities.

Stay tuned for more results from the survey.

PMI-OC New Member Orientation

The New Member Orientation was held on the University of California, Irvine campus on Thursday, January 19, 2006. About twenty new PMI-OC members turned out for this event designed for "new" members. For most of the attendees, this was the first PMI-OC event that they attended. In fact, "new" encompasses those members who have recently joined, those members who want to re-engage, and all those who joined and are just now venturing out to see what PMI-OC is all about.

The meeting was arranged to help new members feel at ease and to allow them to get to know whom to contact when they have questions. Membership Director **Rod Hendrixson, PMP** started the meeting by introducing the volunteers who helped put the meeting together. Those volunteers included Ambassador Chairman **Myrna Bravo, PMP**; **Melanie McCarthy**; Volunteer Chairman **Sylvan Finestone, PMP**; Chair/President **Glen Fujimoto**; **Tammy Hawkins**; and **John Sunderson, CDP, PMP**.

Rod presented a slide show that featured many aspects of both PMI® and the PMI-OC chapter. The slide show included the PMI-OC Vision Statement:

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.

It also included the PMI-OC Mission Statement:

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.

A handout was also given to all attendees that listed the PMI-OC volunteer opportunities for 2006. The handout included the following volunteering opportunities available:

For Dinner Meetings
- *E-mail Blasts* announcing the meetings
- Registration
- Ambassadors
- Speakers, helping to line up or speak
- Setup/takedown laptop, projector, sound system
- Merchandising, running the table at the meeting
- Newsletter articles
- Photography

For Roundtables and Networking Sessions
- *E-mail Blasts*
- Session planning and execution

PMP Class
- Instructor and assistant instructor

New Member Orientations
- Preparation
- Presentation

Elections
- Nominating Committee
- Conduct the online election

Information Technology
- Database design and maintenance

***Milestones* Newsletter**
- Write articles
- Desktop publishing
- Coordination with the printer

Rod covered some of the statistics about PMI including the fact that PMI now has over 200,000 members in 125 countries. He said that PMI-OC is ranked 23rd out of over 200 chapters worldwide and the chapter has more than 1,600 members, including 850 PMPs. The presentation pointed out that there are more than 75 events each year in which to become involved. About 300 volunteers made those events happen last year, including three cycles of PMP preparation classes.

The second part of the orientation was devoted to networking. Melanie McCarthy of Resource Xperts presented the basics of networking.

Her dynamic presentation kept everyone on the edge of their seats wondering what aspect she would cover next. Her presentation included why and how to network. She concentrated on the essentials and connecting those members "looking" with people and places that would be productive. During the course of her presentation, she actually managed to make several connections just within the group attending.

Melanie indicated that there were six valuable tools for networking that everyone should be aware of.

1. 30 second commercial about yourself
2. Business cards, both a personal professional card and one from your current company (if available)
3. Name badge: create your own with company and title to wear on your right shoulder.
4. Resume, maximum two pages
5. Networking brochure
6. Cheat sheet with your accomplishments

Melanie stressed that networking should be viewed as a continuous grooming of contacts rather than a one-time event. Getting to know people and establish relationships is key to networking. Melanie said that you have a 70 percent chance of getting a job from someone you know.

From the survey that was taken at the meeting, most people came for an introduction to the chapter, thought the speakers were both excellent and knowledgeable, and enjoyed the networking and presentation on networking.

To learn more about events and to receive PMI-OC's *E-Mail Blast*, please visit www.pmi-oc.org.

John Sunderson, CDP, PMP
drbatch@acm.org

Scholarships Available

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

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 pursing a degree in project management.

Application deadline for this scholarship is **May 21, 2006**.

MAXIMIZING PROJECT SUCCESS

The Project Leader and the Change Leader

Every time a project is executed, something changes. You, as the project leader, manage both the project and team processes to create the deliverables. But who's leading the change process? When the change is large enough, like a merger, there will most likely be a core project team leading the change. However, if your team is the core project team, it's your job as project leader to be the change leader.

Why? Because resistance to change is one of the top reasons projects fail, no matter how good your deliverables are. So, if your role is to make sure the project is successful, you'll need to reduce this risk for failure due to resistance.

As a change leader, it helps to have tools that will support you in driving change with your stakeholders. So, here are five tools to help you lead change successfully:

1. **A list of roles and responsibilities for everyone impacted by the project.** From one employee to the division head, everyone has a responsibility to deal with the change you are creating. Employees need to accept the change or move on.

Division heads need to drive change within their units. Understanding each role and its responsibility will make it easier for you to anticipate and manage resistance so you reduce your risk of failure.

2. **Assess your initiative leader's readiness to lead the change.** In most cases, you did not initiate the change you're creating, so you need to assess this individual's commitment to the project so that you can be a success. Just like the charter is created to understand the project scope and vision, so should you assess their readiness. Ask yourself, "Are they willing to put themselves in the line of fire? Do they have a vision of what the future will look like after the change is implemented? Will/have they assigned energized people to support you? Are your sponsor and project team ready? Do you know who your change agents are?"

3. **Use five change coordinates for project leaders leading change. In change accountability,** change leaders are given eight coordinates to follow to be successful. In your role, you need five. Here they are:

(1) Collaborate with stakeholders on the anticipated and actual resistance and acceptance in their departments. You created the list of those impacted; use this as the guide for these discussions.

(2) Create a sub-project team to lead the change process. If your project will have a large impact, you should create a separate sub-project team focused specifically on the change process.

(3) Communicate, communicate, and communicate. The more people know, the easier it is for them to deal with change. Your initiative leader should be heading up a communication plan about what is happening and what is coming. If this becomes your team's responsibility, have the change sub-project team develop a communication plan.

(4) Notice the resistance and acceptance around you. Just because someone is on your project team, doesn't mean they won't resist change. Pay attention. If there is resistance among your team, it's a given that there's resistance in the stakeholder groups. This resistance is telling you something's wrong. Figure out what it is, and fix it.

(5) Guide your project team. As the project leader, you already guide the team and PM process. But it's important that you guide your teams on handling and leading change within their stakeholder groups as well.

4. **Involve Your Human Resources Team**. HR professionals are there to support the organization through times of change. When employees are impacted by change, negative behaviors surface. Instead of trying to deal with it yourself, have HR step in and help. Also, there are great change agents among HR as well, so try to have at least one HR representative on your project team.

5. **Evaluate You.** You'll evaluate your success as it relates to the project. But, you should evaluate your success at encouraging change and reducing resistance. During close-out, stop and assess yourself as a change leader. Did you collaborate with stakeholders to reduce resistance? Did you communicate enough? Did you guide your project team on handling and leading change? Did you fell respected as a change leader?

Are you ready to be the project leader and change leader? If you remember that resistance to change is one of the greatest factors for project failure, then it's your responsibility as project leader is to take on that role to ensure your project's success.

Cathy Cassidy and Paula Martin

PMI-OC Dinner Meeting

Tuesday, February 7, 2006

Program: **Strategic Portfolio Management:
A Blueprint for Successful Implementation**
Steve Garfein

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

Schedule: 5:30 - 6:20 p.m. Registration and networking
6:30 - 7:20 p.m. **Dinner. See menu at right.**
7:20 - 7:40 p.m. Announcements and vendor presentations
7:40 - 8:45 p.m. Presentation
8:45 - 9:00 p.m. Wrap-up and raffle

Cost: **Dinner and Presentation**
In Advance: *At the Door:*
Members $30.00   Members $40.00
Non-Members $35.00   Non-Members $40.00

Featured Presentation Only (Members and Non-Members)
In Advance: $15.00   *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, February 5, to obtain the "in advance" price. Reservations made after 9:00 p.m. on February 5 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, February 5, 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, February 9, 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, February 21, 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

February 7 Dinner Meeting Menu

Beginning this month, we will publish each month's dinner meeting menu in *Milestones*. Bon appétit!

Garden Salad
•
Chicken Florentine
*Baked Chicken Breast
Stuffed with Ricotta Cheese,
Mushrooms and Spinach*
*Served with Rice Pilaf
and Fresh Seasonal Vegetables*
•
*Chocolate Fudge Cake
with Raspberry Melba*
•
Vegetarian meals available upon request

PMI-OC Registration Fees

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

Advanced Topics Seminars
• **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 adjustments 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.

COMING EVENTS

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

FEBRUARY 9 BREAKFAST ROUNDTABLE
Breakfast with Your SOX On

FEBRUARY 21 BREAKFAST ROUNDTABLE
PMO-Local Interest Group (LIG) Breakfast Roundtable

FEBRUARY 25 SPECIAL FULL-DAY ADVANCED TOPIC SEMINAR
"Unleashing the Leader Within"
Dr. Jerry Brightman
Location: Wyndham Orange County Airport
See page 5.

MARCH 9 BREAKFAST ROUNDTABLE
Breakfast with Your SOX On

MARCH 14 DINNER MEETING
"Project Manager: Leader, Coach, Mentor"
Margaret Meloni, PMP

MARCH 21 BREAKFAST ROUNDTABLE
PMO-Local Interest Group (LIG) Breakfast Roundtable

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

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