PMI® MILESTONES
ORANGE COUNTY CHAPTER

SEPTEMBER 2006 • Volume 18 • Number 9

The
7th Annual
Southern California Coalition
Technology Conference

Was a
Huge
Success

See pages 13 and 14
for story and pictures.

2007

Board of Directors Election

Meet the candidates on
pages 5 through 8.

SEPTEMBER 12TH PMI-OC DINNER MEETING

Business Continuity Programs:
Keep It Clean and Simple!

By Thomas Stein

The topic of BCP has been around for years, but with recent planned and unplanned events in Orange County and the world, businesses need to proactively develop plans to protect themselves and their associates. The statistics are staggering; up to 60 percent of small companies will collapse within a year after experiencing a major denial of their systems, their associates, or their facilities.

Tom will present an overview of the key facets of a successful BCP. Within his presentation, he will examine the BCP life cycle, components, methodology, tools, and BCP as it is addressed in the PMBOK®.

The overall success of BCP in your project, program, or company will be attributed to a sound and functioning set of development tools, proficient teams, and standard operation procedures.

Thomas Stein has more than 20 years of broad-based experience in program and executive operational management, Tom has successfully managed large-scale complex operations throughout the world and is presently working on the establishment of a North American Business Continuity Plan (BCP) for a Fortune 100 company. This effort will establish a program to improve business programs and processes and will protect the company's core business functions and revenues, exceeding $85 million a year. Tom is also the program manager for a Fortune 100 IT outsourcing desktop support contract.

Before entering Corporate America, Tom was a Lieutenant Colonel in the Marine Corps, specializing in the areas of information technology, logistics, and aviation.

As a program manager, Tom has held some of the highest achievable positions and designations in his field of expertise and has received numerous awards over the years.

Tom is currently Associate Professor for Embry-Riddle Aeronautical University and has been a member of the faculty since 1998. Tom has a Masters Degree in Information Systems and holds numerous certifications in information technology and aviation.

Tom's company, GreyHawk Enterprises in Orange, is broadly focused, but encompasses commercial airline safety, commercial aviation, aerospace, information technology, and the electronic industries.

September Vendor Showcase:
Compuware Corporation
www.compuware.com
See ad on page 4.

2006 CHAPTER BOARD

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THE CHAIR'S COLUMN

Growing Our PMI Community

The PMI Orange County Chapter fosters the local project management community in our small area of the world. We are the primary PMI® contact for the majority of members. We constantly strive to provide members with a wide variety of programs, events, educational materials, and networking opportunities to further their professional and personal goals.

Most members live or work in Orange County, thus we focus our deliveries here. We also have many members who find themselves out of town for extended periods of time: consultants, temporary assignments, or the "road warriors;" sometimes you may be out of town for just a week. If this describes you, what do you do at the end of your work day? Maybe you look for a place to eat dinner, drive around town, or return to the hotel and watch TV.

I want to suggest another option. During these times, I encourage you to visit other chapters to extend your PMI community and to help us with ours. While each chapter is charged with the same basic purpose, providing local PMI support for its community, each has its own personality that has evolved to meet the needs of its membership. Look for a local chapter and see if they have any events that interest you. For those who are PMP® certified, this is also a great way to pick up PDUs while you are on the road,

While exploring and experiencing other chapter events and meetings, I want you to bring back and share ideas that can add new value to our local project management community; this supports our chapter's purpose statement, "providing members quality professional development and networking opportunities."

As in past articles, I feel that I should lead by example. I was recently assigned to work in Scottsdale, Arizona. I called my peer, **Sash Dhar, PMP**, the Phoenix Chapter president. I told him that I was in town and arranged to attend the Phoenix dinner meeting.

At the meeting, it was great to see that the Phoenix Chapter had adopted some of the different ideas that Sash and I discussed earlier this year at the Region 7 meeting. We ended up talking until midnight, sharing ideas and challenges of our respective chapters. Overall, it was a great experience; I was able to provide some ideas about what they could do to help their members, and I came away with a few ideas that can benefit our chapter and members. It's a win-win, and I look forward to my continued discussions with Sash.

Other extensions of our community are the PMI Specific Interest Groups (SIGs) and PMI colleges. While there are many members who actively participate in these groups, there are also others who have little or no exposure to the groups' existence, purpose, and diversity.

To that end, one of my personal projects has been to create an outreach group to establish more formal relationships, provide our members value by establishing awareness of these communities, and promote the benefits that these communities offer. I have created a new committee that is charged with carrying out this task, and I hope to see the results of their efforts in the months ahead. See "Volunteer Opportunities" on the next page.

My hope is that we are able to create synergies between our chapter, other chapters, and the virtual community groups. Each would reach out to the other with value and benefits, ultimately delivering more value than any one group alone could achieve. I look forward to the evolution of our local PMI community through efforts from our chapter members, both as formal ties, as well as grass roots efforts.

Glen Fujimoto
Chair/President

PMI-OC Marketing Areas

Over the last months we've talked about volunteer opportunities, focusing on membership and programs, giving you many ways to make a difference to our chapter. This month we are going to discuss the marketing areas to describe the choices available to you as a volunteer.

Brent Felsted, PMP is PMI-OC Marketing Director. Brent and his team are responsible for marketing the chapter to the membership and to the community. These responsibilities include the vendor presentations at our dinner meetings, *Milestones* advertising, *E-mail Blasts*, and Project of the Year. Officially, he has three sub-committees, Communications, Public Relations, and Outreach, all designed to address the functional areas.

In August Brent supported the dinner meeting with a vendor presentation from the company where he works, UGS. During the course of the year we have been visited by a number of different vendors, all providing key information on their companies, goods and services.

Each month *Milestones* is full of advertising from companies such as Project Insight, RMC Project Management, ResourceXperts, UC Irvine Extension, and many others. We can thank Brent and his team of volunteers for the fine job that they do to obtain the ads and maintain vendor satisfaction.

Once again, we are beginning our search for the Project of the Year. Brent is assembling a team to evaluate the submitted projects and recommend the project to the board. This is a particularly exciting committee, one that is currently looking for volunteers. See the volunteer opportunities at the right.

Marketing is how we publicize our chapter at events. Brent and his team prepare the handouts, set up and man the PMI-OC booth at events such as the recent SCCTC Conference. We are very proud of our chapter's presentation at these events.

We are always looking for volunteers, and all of these opportunities are available, just let us know of your interest at Volunteer@pmi-oc.org.

Sylvan Finestone, PMP

Volunteer of the Month

Kim Fields, PMP

The PMI-OC Board of Directors unanimously selected **Kim Fields, PMP** as the Volunteer of the Month for August 2006. Kim was honored at the August dinner meeting by **Sylvan Finestone, PMP**, the chapter volunteer coordinator, who presented her with a Certificate of Appreciation.

Kim has been a chapter member since January 2001, earning her PMP® certification in July 2002. She volunteered with the Membership Committee and has moved on to work with the Programs Committee.

At last year's PMInAction event, she assisted with registration and has also been a volunteer at various conferences, recently supporting the "Day in the Life" series at the July 11 Career Fair.

Currently, she is the Dinner Meeting Chair, working with the Programs Chair. Kim has also volunteered with the Los Angeles Chapter, where she was a project manager for a PMP training class.

For the last seven years, Kim has been an IT project manager and Supervisor of the Packaged Application Group at Web Services Company

In selecting Kim, the board of directors recognized her long association with the chapter, leading, sharing and contributing to its teams, The board thanks her for always being ready to step up when asked and for her many contributions.

Sylvan Finestone, PMP

Volunteer Opportunities

Component Outreach Committee
Need project manager and team members to raise awareness and promote resources available thorough SIGs/colleges. Establish and maintain relationships with other non-chapter components (SIGs/colleges) for added PMI-OC membership value. Need four volunteers to drive this process. Membership in a SIG/college is helpful. **Contact Chair/President Glen Fujimoto.**

Project of the Year
Need project manager and team members to identify candidates and select the Project of the Year for 2006. Once candidates are identified, review the project packets, rank projects, and conduct interviews as required. This is a three or four person team. **Contact Marketing Director Brent Felsted.** Four hours a month for four months.

Membership Survey and Metrics Committee
Need project manager and team members to oversee the continuous feedback process for our membership. Design membership opinion and event satisfaction surveys. Survey the membership, collect survey results, and submit your survey analysis to the board. Track and report membership metrics, analyze the data, and communicate findings to the board. (Data is provided for the study.) **Contact Membership Director Rod Hendrixson.** Eight hours every other month.

Dinner Meeting Technology Volunteer
Support the dinner meetings by setting up the audio/visual equipment. This includes laptops, projector and microphones/speakers. Sound tests for the speaker's microphone is also expected. Post-meeting, all equipment is re-packed and stored at the volunteer's home. **Contact Programs Director Kristine Munson.** As required time commitment.

New Member Orientation Committee
Need project manager to work with membership director to plan and conduct the bi-monthly new member orientations. Using the event template and the support committee, ensure publicity, facilities, food, speakers and materials are all in place for the event. **Contact Membership Director Rod Hendrixson.** Eight hours every other month.

Records Committee
Need project manager and team members to support the effort to create a centralized repository for the PMI-OC records, including electronic data, assets and any other PMI-OC records. **Contact Operations Director Pan Kao**. Fifteen hours a month for three to five months.

Budget Review Committee
Need project manager and team members to assist the finance director in financial analysis of the budget and actuals of the chapter. **Contact Finance Director Stephen June**. Meets quarterly for four hours.

PDU Tracker for the Chapter
Assist the volunteer chair in tracking the PDUs earned and reported by the directors. Assist in the preparation and distribution of the PDU certificates. May also support the upcoming volunteer recognition day by planning and organizing on the day of the event. **Contact Membership Director Rod Hendrixson.** Two hours a month.

Earn 21 P.D.U.s

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2007 PMI-OC Board of Directors Election

August 10, 2006

To the PMI-Orange County Chapter Membership:

The PMI-OC Nominating Committee recommends the following candidate slate for the 2007 PMI-OC Board of Directors.

Chair-Elect	**Judy Quenzer, PMP**
Director at Large	**Kim Fields, PMP**
Finance Director	**Lora Lockwood, PMP**
IT Director	**Francis Amalraj, PMP**
Marketing Director	**Brent Felsted, PMP**
Membership Director	**Sylvan Finestone, PMP**
Operations Director	**Beth Williams, PMP**
Programs Director	**Pan Kao, PMP**

The Nominating Committee selected this slate from a pool of highly qualified applicants who have demonstrated a commitment to the chapter.

Each candidate submitted a questionnaire and resume to the committee. Each applicant's questionnaire responses were reviewed, discussed, and rated. A consensus approach was used to generate a single score for each candidate and question. If any committee members objected to the proposed score, the score was modified until no committee member objected. The Nominating Committee also validated the current membership status of each applicant.

The Nominating Committee thanks all applicants and encourages each PMI-OC member to participate in the upcoming election.

2006 Nominating Committee

Adrienne Keane, PMP
Janice Preston, PMP
Kristine Hayes Munson, PMP
Mike Graupner, PMP

Candidate Statements

Cornelius Fichtner, PMP

Chair
Current Chair Elect

Judy Quenzer, PMP

Chair Elect

PMI and PMI-OC Experience
PMI-OC member since 2000
Leadership activities:
- PMI-OC Programs Vice President 2000-2002
- PMI-OC Membership Vice President, a few months in 2003

Volunteer Activities
I have been a judge for Projects of the Year, advisor for the PMI-OC Programs Director, and member of the team for July 11, 2006 career fair and leadership event.

Related Experience
I am a highly resourceful, motivated professional with experience in project management, database design, training, human resources, operations management and event planning. I have proven myself as a team leader and problem solver with highly developed organization, communication and planning skills. I'm a high-energy team player producing results. I've served as liaison among business units, technical staff, employees and customers and understand diverse needs of internal and external customers, building long-term, quality relationships.

I was a member of the programs committee for a year at PCMA (Professional Coaches and Mentors Association) and have worked with teams to create programs for PMI-OC. I was volunteer chair for the 2005 PCMA conference, working with the conference chair and managing volunteers for the event.

I was Vice President of Education and President of Toastmasters, Inc. company club. I worked with members to schedule speeches, mentored members on speeches, set goals and created a strategic plan with the leadership team. The club recently achieved the Distinguished President's Club award from Toastmasters (highest club award) upon achieving the plan goals.

In 2006 I am serving as programs co-chair for PIHRA (Professionals in Human Resources), Orange County Chapter. I work with the programs chair to plan and organize meetings.

I have volunteered and served as a team coach with John Hall for two 21st Century career management classes,

While working at Ingram Micro, I initiated a project management interest club for project managers to share information, network and create tools. I presented a proposal to management and obtained executive sponsorship. I also participated as a team member to create a project management methodology, tools and templates for project managers.

Goals
To partner with and support chair and board members to achieve PMI-OC strategic plan and goals.

Final Thoughts
I have previous PMI-OC, PCMA, PIHRA and Toastmasters board, leadership and volunteer experience.

I realize the importance of professional and personal development for the members and leaders and want to be a part of the group that takes PMI-OC to the next level in the chapter maturity model.

Being a part of this group feels good and like a place I belong.

I have time and dedication to support and achieve the BOD goals for the chapter, including members, corporations, the community and guests.

I am a team leader and player, organized, respectful of others, people and results oriented, optimistic, enthusiastic and responsible.

Kim Fields, PMP

Director at Large

PMI and PMI-OC Experience
I have been a member of PMI since 2001 and PMI-OC since 2002. I began working on the Membership Committee and then moved over to the Programs Committee, where I worked on the team that developed the requirements, rules, and judging criteria for the proposed project management competition for the PMInAction event in 2005. I also assisted with registration for that event.

I have volunteered to help out in different ways at several chapter-sponsored events over the years, including conferences. I recently volunteered as the room monitor for the "Day in the Life" series at the Career Fair event in July, 2006. Additionally, I was instrumental in securing the location in north Orange County for the PMI-OC PMP® prep class, which is currently held at the University of Phoenix Costa Mesa Learning Center. I have also written an Advanced Topic Seminar review for *Milestones*.

Related Experience
I am currently PMI-OC Dinner Meeting Chair. I work with several volunteers who assist in putting on the monthly dinner meetings.

In 2005, I was responsible for the booth design and coordinating volunteers for staffing the PMI ISSIG booth at the PMI Global Congress in Anaheim, California. This involved holding and participating in virtual meetings via conference

Continued on page 6

2007 PMI-OC Board of Directors Election *Continued from page 5*

Kim Fields, continued . . .

calls, web conferencing, and e-mails. I was also a student coordinator for the PMI-LA Chapter PMP prep classes last fall. I am currently working on revising the operations of the PMI-LA PMP prep class process and am designing actual process flows that will help make this event run more efficiently.

I have been working in the IT field for over 20 years, serving in various capacities. I have been a project manager for about ten years and am currently a project manager of the ERP Custom Applications project and Supervisor of Packaged Applications Group (consisting of four developers) at Web Service Company, where I have worked for the past seven years. Prior to working on this ERP project, I was the project manager for Web's CRM implementation of Siebel.

Goals

The goals that I would like to achieve in this position include ensuring that PMI-OC meets the needs of the current membership, as well as understanding and focusing on what the organization, membership, and strategic direction will look like in the next three to five years. I would also continue to ensure that the chapter maintains strong business alliances in support of the chapter's goals, mission, and vision. Additionally, my goal would be to stay abreast of trends that could impact the membership of PMI-OC.

Final Thoughts

The skills that I would bring to the board include:

- Collaboration/cooperation
- Educational training
- Determination
- Perseverance
- Leadership

Lora Lockwood, PMP, CDP

Finance Director

PMI and PMI-OC Experience

I first joined PMI in 1996. I renewed my membership when I moved to California in 2003. I became active in the Orange County chapter at that time, and the first thing I did was look for something I could do as a volunteer. While on the Marketing Committee, I served as editor of *Milestones*, and I was chair of the 2006 SCCTC Conference board.

Related Experience

Project manager with over ten years experience:

- Establishing PMO procedures, methodology and artifacts.
- Mentoring project managers in process and framework methodology and practice.
- Managing "at risk" projects
- Volunteered for the State of North Carolina as an adult mentor for a teen mother.

Goals

I would like to document procedures. I would like to be able to spread some of the responsibilities to additional volunteers. I would like to work closely with the chair and former holders of the position to help achieve goals that have been conceived and discussed, but are not yet implemented. In this way, I can build on the expertise and experience of individuals who have held the position before me.

Final Thoughts

I am an experienced project manager with a background in starting with diverse project teams, hitting the ground running, and achieving success. I am a Phi Beta Kappa and graduated *summa cum laude*. I can learn and articulate processes. I work well with teams to develop solutions.

Francis Amalraj, PMP

IT Director

PMI and PMI-OC Experience

I have been a member of PMI and PMI-OC since August 2004 and have been involved as follows:

- Currently PMI-OC IT Director
- Co-instructor, PMP preparation courses
- Identified a vendor to provide PMI-OC with online balloting
- Chaired the committee for 2006 Board of Directors election. Committee was responsible for non-competitive election.
- Participated in the member feedback session and provided constructive input
- Currently chair of the chapter's Repository Committee, helping organize chapter records and facilitating a smooth transition from one director to another when the new board is elected

Related Experience

- Board member, Montessori International, a new non-profit organization providing Montessori education to young children
- Managing IT projects for the last six years

Goals

- Maintain and improve the chapter's IT infrastructure (includes website and various databases)
- Seek ways to use the chapter's IT infrastructure more efficiently
- Bring in more volunteers to help us with maintenance and development effort
- Leverage IT best practices, policies and potential possibilities to increase the value IT is providing to the board of directors and the members

Final Thoughts

- I have been an IT professional for the last 14 years, progressing from developer to director.
- I have volunteered with the operations director and understand the functioning of the chapter and the board.
- I have experience in implementing and maintaining billing and accounting systems.
- I have experience in developing and managing web applications.
- I was awarded my PMP in March 2005.

Brent Felsted, MSTM, PMP

Marketing Director

PMI and PMI-OC Experience

- Joined PMI-OC in summer of 1998
- Currently serving as PMI-OC Marketing Director
- Completed two terms as Volunteer Coordinator
- Organized three different volunteer appreciation events
- Organized PMI-OC toy drive for the Orange County Fire Department's "Spark of Love"
- Authored articles and taken photos for *Milestones*

Related Experience

- Experienced computing engineer; demonstrating and promoting software; developing and integrating complete computing solutions for customers
- Accomplished in coaching, consensus building, presentations, training, sales support, and diplomacy
- Experienced trainer, including ten years at University of California, Riverside Extension campus
- Lead small to midsize groups on hiking and mountain climbing (hiking) adventures
- Chaired publicity committee for church and running clubs
- Promoted event time and locations for bands in Orange County

Goals

- Get the marketing group fully staffed and running self-sufficiently
- Find and recommend new marketing director for next year
- Maximize chapter visibility in the Orange County area and beyond

Continued on page 7

2007 PMI-OC Board of Directors Election *Continued from page 6*

Brent Felsted, continued . . .

Final Thoughts
- Four to five years of experience working with present and past PMI-OC boards of directors
- Four to five years of experience in volunteering and working with PMI-OC volunteers
- Insight into working in the IT world
- Willingness to serve
- Desire to do what it takes to get the job done

Sylvan Finestone, MBA, PMP
Membership Director

PMI and PMI-OC Experience
I have been a member of PMI and PMI-OC since 2003. I began my chapter volunteering as the volunteer coordinator for PMInAction in 2005. Since January 2006, I have served as the volunteer coordinator in the membership area, revamping the position by adding a volunteer page in *Milestones* and PowerPoints at the dinner meetings. I have been updating and maintaining the volunteer register, participating in the new member orientations, as well as updating forms, policies and procedures to maximize the recruitment, utilization and retention of our volunteer base.

After receiving my PMP in March 2005, I have been an instructor for the PMP prep class, accepting teaching assignments in Quality (1), Scope (1), Introduction and Professional Responsibility (3), and have also conducted the Review Session (2). For the last class I rewrote the review session to bring in synchronization with the PMBOK® Guide. I have been active in the recruitment of students and instructors from both the workplace and the membership. I have volunteered to conduct additional study group sessions with students in the PMP prep class. I have also volunteered to teach in the PMI-LA classroom program.

Related Experience
- Senior manager and senior principal consultant in the finance and health care industries for over 20 years
- Recently began a new assignment in manufacturing, heading a PMO
- Successful Sarbanes-Oxley audit manager and senior project manager
- Project manager for the key project reviewed by the Software Engineering Institute to obtain CMM Level 3 accreditation
- Thirty years of professional training/mentoring experience, including in-house process trainer and mentor
- Highly-rated PMI-PMP course instructor
- Chairman HBCSD Bond Oversight Committee ($45 M capital improvements to city schools)
- Member Board of Directors, Seaview Little League, Chief Umpire, 1994-1996
- Member, Board of Directors, Huntington Beach City School District Educational Foundation 1994-1997, Founder, Treasurer and Chairman
- Member Board of Directors, Educational Enrichment Foundation, Huntington Beach Unified High School district 1997-2001, Treasurer
- Member Board of Directors, Congregation Bnai Tzedek 1991-1993, Vice President of Operations and Finance
- Other volunteer activities associated with school programs, youth coach, umpire and referee

Goals
My overall goal is to work with the other board members to collectively maintain and advance the chapter's strategic goals and operational activities. A complementary goal is to work with the other board members to assist them with meeting their own goals and objectives. The specific goal is to gain and utilize knowledge of the membership function to complete the membership responsibilities.
- Actively participate in the board activities, functions, meetings, and programs for the membership
- Provide support to all activities that will expand the viability of this chapter to our members
- Grow the membership of the chapter
- Evaluate all membership activities and determine if they should continue and expand or be reduced, eliminated, or replaced with alternative activities
- Bring all recommendations to the board for discussion and concensual action
- Continue to report the membership metrics, while examining those metrics to determine if there are other or better metrics to implement

Final Thoughts
During the last year, I have made it a point to learn as much as I could about the membership function, attending board meetings as the volunteer coordinator, learning board dynamics, the roles and responsibilities of each of the positions, and institutional knowledge. I also attended the Region 7 Leadership Meeting in May, learning about the membership functions as they are implemented at other chapters in the region.

My attendance at dinner meetings, participation in PMInAction, PMP preparation courses and board meetings has given me a unique knowledge of PMI-OC, the board and the intricacies of the organization.

In my work experience, as a senior program manager with expertise in governance, I have a well defined sense of the use of process and procedures and the knowledge of how to implement that in the workplace, and by extension, in the board environment.

Beth Williams, PMP
Operations Director

PMI and PMI-OC Experience
I have been a member of PMI and PMI-OC for one year. I began volunteering with PMI-OC in October 2005, acting in the role of hotel coordinator for the monthly dinner meetings. In February of 2006, I was able to assist with the Jerry Brightman leadership seminars. Since then I have had the pleasure of acting as the student coordinator during the spring PMP prep course held in Laguna Hills, I've helped out with the Career Fair/July dinner meeting, making name tags and compiling the PowerPoint slides for the presentation, and I worked the registration desk at the SCCTC Conference last month.

Related Experience
Recently, I've had a change of jobs and am now working as a project coordinator at Toyota Financial Services. In this role, most of my time is spent supporting large software projects. I am required to maintain accurate and timely records of meetings, business requirements, as well as facilitate communication between the PMO and project team members. I feel that these skills are complementary to those the operations director would need, not only to maintain the high standards already set for the PMI-OC chapter, but also to identify areas of improvement in processes and communication between PMI-OC members, volunteers, and sponsors.

Goals
In this position, I would like to learn more from the existing board about the established processes for elections and policies/procedures for the chapter. I feel that the operations director does a great service for the chapter and its members, and I would like to uphold the high level of standards that have been provided over the years. As the chapter grows in members, I would like to help the board find ways to get the members involved and help to streamline processes of the organization. This may be in the areas of communications from the board to the members or by offering education on new processes and procedures of the chapter.

Continued on page 8

2007 PMI-OC Board of Directors Election *Continued from page 7*

Beth Williams, continued . . .

Final Thoughts
Although I have been a member for only one year, I feel that I have learned so much already from being able to interact with sponsors, board members, and chapter members. I am very proud to be a member of PMI-OC and feel that I bring that enthusiasm to the events in which I am involved. I also have a great deal of respect for the professionals in the organization and how they take time from their lives and families to help develop the field of project management. Finally, as a student, I've learned the importance in keeping commitments and being timely with documentation, which I feel is important in a volunteer organization.

Pan Kao, PMP
Programs Director

PMI and PMI-OC Experience
- PMI member for six years
- PMI-OC member for five years
- PMI-OC Operations Director (2005-2006)
- PMI-OC website maintenance (2001-2004)
- Member of PMI Chinese PMBOK Guide Translation Committee (2004)
- 2007 PMI Leadership Master Class participant (2006-2007)

Related Experience
- More than 20 years of IT experiences as developer, trainer, business analyst, technical project lead, and project management consultant in various industries, including finance, automotive, and legal
- Toastmaster Club Officer of Club No. 1246 (2004-2005)
- Business partner of Chinese version of PM-PREPARE.com
- Real estate investor and broker
- Currently working on Ph.D. in Applied Management and Decision Sciences program at Walden University, specializing in leadership and organizational change

Goals
- Build 2007 programs based on the success of 2006 programs (e.g. Jerry Brightman Leadership Seminar, special Mark Adams event, and SCCTC Conference, just to name a few)
- Investigate alternative approaches to deliver values to every member of PMI-OC
- Grow leadership in volunteers of programs committees

Final Thoughts
A true experienced leader can look at an acorn and see a future oak tree. What I have learned from 2007 PMI Leadership Master Class is that a true leader, in addition to growing leadership on him/herself, will grow leadership on others as well.

We are pleased to announce that we will use electronic balloting again this year. **The online election will be held from September 15 through September 30, 2006.**

There is still time for you to become an eligible voter. To participate, you must be a member of PMI® and PMI-OC chapter as of August 31, 2006. Please sign up at www.pmi.org.

If you are already a member of PMI and PMI-OC, please update your personal profile at www.pmi.org. Make sure that your e-mail address is up to date. If you have any questions about how to update your personal PMI profile, please contact membership@pmi-oc.org, and if you have questions about the electronic election process, please contact operations@pmi-oc.org.

Test Your Knowledge on PMP® Exam Questions

Answers are on page 19

1. When using the earned value methodology, one can determine the cost variance (CV) to date:
   a. By dividing the earned value (EV) by the actual cost (AC)
   b. By subtracting the actual cost (AC) from the earned value (EV)
   c. By subtracting the actual cost (AC) from the planned value (PV)
   d. By dividing the earned value (EV) by the planned value (PV)
2. A detailed description of what something is and how it is measured in the quality control process is called:
   a. An operational definition
   b. A change control procedure
   c. A quality audit
   d. A configuration audit
3. Your company has undertaken a ten million dollar contract to develop and implement engineering modifications for a prescribed number of radar systems. As the project manager, you have determined that it is necessary to re-baseline the project because:
   a. A key component in the system is experiencing high failure rates under test, requiring additional engineering modifications
   b. The consumer price index increased 4.2 %, higher than the 2.6 % originally budgeted
   c. The cost performance index (CPI) is below 1.0 and trending lower
   d. Your customer has directed you to change the overall system design, for which the approved cost impact is $300,000.
4. A work breakdown structure is:
   a. A list of project tasks in chart form
   b. The same as an organizational breakdown structure
   c. A deliverable-oriented hierarchical decomposition of the work to be executed
   d. An input to the risk management plan

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PMI-OC 2005 Project of the Year

Women's Pavilion at Hoag Memorial Hospital Presbyterian

The evening was highlighted by **Mike Parris**, P.E., PMP, Director of Construction at Hoag Hospital (left), talking about the newly completed Sue and Bill Gross Women's Pavilion. This was PMI-Orange County's Project of the Year for 2005. This project has also been recognized by several other associations, winning awards for its outstanding planning, design, and implementation.

This wing of Hoag Hospital has become the main entrance for the facility. It opened two months early, in October, instead of December, of 2005. It also finished **under budget.**

So how did Hoag Hospital build an award wining quality building in the middle of a land locked, existing hospital zone, in Newport Beach, California? How did they accomplish all this ahead of schedule, while saving money?

Planning, planning, planning followed by collaborative work among all the partners on the project. Mike did say that he would bring on the contractor earlier next time. Mike was picked as project manager and brought on board at the end of the planning phase; the contractor joined the team after that. One of the lessons learned was to involve both earlier, in the planning phase.

What challenges are there in building a new hospital in the middle of an existing, working, hospital complex in the middle of Newport Beach? There was little to no extra room to work with. As a result, there was no extra space to store equipment or supplies.

This was truly a scheduling nightmare for all involved. The practice of "just in time" (JIT) delivery and installation was the norm. Because the hospital did not have storage room, everything had to be scheduled and delivered as it was needed. Once a delivery truck arrived, its contents were pulled off and put on the building. Steel for the building superstructure, concrete for the siding, and windows for the rest of the building's exterior; all this required a very large crane. The construction team used a crane with an 80 ton capability and a 230 foot reach. Some of the payloads were 20 tons, delivered to a parking lot about 100 yards away. This was standard procedure for the big items necessary to build the hospital.

***Below: Issam Khalaf** from Jacobs Facilities, Inc., construction manager on the project*

Once the building was complete, about one year before move-in, the interior needed to be finished with all the wiring, plumbing, and infrastructure for the computer systems. Then the outfitting of the furniture, 36 million dollars worth of chairs, tables, desks, beds, lamps, etc., began. Once again, the logistics and planning of each room, coordinating delivery of the furniture, moving from the truck to the rooms, and then setup, was no small task.

So how did Mike and his management team overcome all these obstacles? Such as being "land locked," working in an active hospital complex in Newport Beach, where they could not start before 7:00 a.m or work past 8:00 p.m., make any noise or dust **on a construction site!** How did they do this and still produce an award winning product?

The answer was a well planned project. The planning started as early as 1997, eight years before the project's end and four to five years before it started. They knew what they were doing, what they were up against, and what they wanted the end product to be. They created a great new 320,000 square foot women's wing at Hoag Hospital.

By the way, it is an equal opportunity hospital; the first patient admitted into the new women's facility was a man.

Brent Felsted, PMP

***Top to bottom:** Starting, November 2001; footprint of the building and the springs it sits on; harbor view of nearly completed project*

Project awards received to date:

- 2005 AGC Build America Merit Award
- 2005 AACE International Southern California Section Section Award 2005 Project of the Year
- 2005 PMI Orange County Project of the Year
- 2006 CMAA-SC Project Achievement Award Private Sector Constructed Value more than $100 Million
- 2006 IIDA Calibre Award-Healthcare

***Below:** Move-in, October 5, 2005*

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At the August 8th Dinner Meeting

Above left:
Judy Quenzer, PMP *checks in and discusses the upcoming election with* ***Lew Siegler, PMP.***

Above right:
Frank Reynolds, PMP *has a good time.*

Below:
New PMPs queue up to receive commemorative mugs from ***John Fuchs, PMP.***

Above:
September vendor showcase, UGS

"What was I thinking? Did I actually do that in public?"

Cornelius Fichtner, PMP *teaches the audience his now famous "sprinker dance."*

Mark Your Calendars Now

Sept. 9 Advanced Topic Seminar

Jan Birkelbach, PMP
Creating Effective Risk Responses
SEE PAGE 17.

Sept. 12 Dinner Meeting

Tom Stein
Business Continuity Programs:
Keep it Clean and Simple!
SEE PAGE 1.
Election Kick-Off

Oct. 7 Advanced Topic Seminar

Diane Altwies, PMP
Overcoming Team Dysfunction

It is a well-known fact that Information Technology professionals are typically not the strongest in soft skills. The dynamics of teams, especially when the team includes IT professionals, as well as business professionals, can be especially challenging. Diane Altwies discusses what it takes to get a team truly working together as a well-oiled machine. She brings together the theory of team dynamics and offers some real-world advice in dealing with dysfunctional teams. Join her for an educational, enlightening and fun experience that you can truly use back at the office.

October 10 Dinner Meeting

Craig Smith
Building the Great Pyramid,
Project Management 2550 B.C.
Annual Membership Meeting

October 19-21

PMI North American Leadership Meeting
Seattle, WA

October 22-24

PMI Global Congress
Seattle, WA

Nov. 4 Advanced Topic Seminar

Mike Cohn
Agile Estimating and Planning,
User Stories Applied

Dec. 3 Advanced Topic Seminar

Margaret Meloni, PMP

December 12 Dinner Meeting

Christine Fotheringham and
PMI-OC Fellowship Awards

Learn for Project Management

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

PROJECT MANAGEMENT ESSENTIALS
Mon., 6:30-9:30 pm, September 18-November 20
Reg #062-MBJ-J04

PROJECT SCHEDULING AND RISK MANAGEMENT
Tue., 6:30-9:30 pm, September 19-November 14
Reg #062-MBJ-J03

PROJECT MANAGEMENT PROCUREMENT
Thur., 6:30-9:30 pm, September 21-November 16
Reg #062-MBJ-J02

NEW PRODUCT DEVELOPMENT
Thur., 6:30-9:30 pm, September 21-November 30
Reg #062-MBJ-J01

PROJECT MANAGEMENT PROFESSIONAL (PMP) CERTIFICATION REVIEW PROGRAM
Tue.-Thur., 9 am-5:30 pm, October 10-12
Reg #062-MBJ-J05

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7th Annual Southern California Coalition Technology Conference

As I entered the luxurious Westin Long Beach, I could tell that the **7th Annual SCCTC Conference** would exceed those before it. All elements of a successful conference were carefully planned and organized, including the overall layout, speakers, keynotes and participating vendors. The conference was sponsored by the Orange County PMI® chapter, Los Angeles and Los Padres PMI chapters, the SCQAA chapters in Orange County, San Fernando, Inland Empire and Los Angeles, and the Quality Assurance Institute Worldwide.

Over the two day conference, attendees were treated to five informative keynote speakers, 35 different seminar breakout sessions in five categories, at least 13 vendor booths with an array of product offerings, Borders book table, four book signings, raffles and great food. The check-in process was quick and efficient. I took my conference program and made my way to the continental breakfast. The conference had five speaker tracks: leadership and professional development, tools and techniques, case studies, a bonus track, and a vendor track.

The leadership and professional development track contained seminars and speakers to help project managers improve their leadership skills, such as "How to Communicate Difficult Things Without Difficulty" by **Will Crist** and "Is CMMI Worth It for Small to Mid-Size Firms?" by **Jim Cisneros**. This track also had career oriented topics and speakers such as "From Lay-Off to Pay-Off: Job Search Secrets Revealed" by **Melanie McCarthy** and "Strategic Approach to Managing Your Career" by **Brenda Ingham**.

The case studies track incorporated the speakers' actual past experiences into the topic, while the tools and techniques track focused on specific methods and systems of benefit to conference attendees. While it is understood that track speakers are not allowed to promote a specific product, the vendor track was set up just for that purpose, with attendees viewing several project management, quality, and process offerings.

I started off with a vendor track, listening to **Ryan Dennis**, "The Process Innovation Era; the Evolving Role of Software Development Professional in Business Transformation." Ryan explained how companies are looking to process innovation to enhance business and how software development is moving from project-based to process-based. He discussed the methods of workflow management based on best practices and customer experience.

Following that was the first keynote speaker, **Nathan Petschenik**, discussing "The Formula for Success in System Testing." As the author of the book "System Testing with an Attitude," Nathan demonstrated his expertise in the topic. He explained that system testing success was not only technical excellence, but nurturing front-loaded quality. This means building in quality proactively and the importance of nurturing an attitude and culture conducive to testing. He also covered the practical limits of system testing, how to select test cases and ways to identify roadblocks. Ryan challenged us with his entrance criteria to the system test: "Developers must believe their software is ready for end-users on the day the software will enter the system test phase."

Next I listened to **Kristine Hayes Munson, PMP** our chapter's programs director, speaking on "Getting It Done." Kristine focused on how to effectively get a project done when you don't have direct line control and introduced a five step process: (1) prepare, (2) ask, (3) trust, (4) follow up and (5) give back. She provided informative advice on each step, including the importance of building internal relationships, asking for what you need while being respectful of others' time, removing obstacles, knowing when to escalate, and honoring commitments.

After a hearty lunch of soup, sandwiches and fresh fruit, was the next engaging and entertaining keynote, "Making Your Project a Success: Communication Skills," by **Steve Kaye**.

Steve explained how communication is primariily "the perfection of common sense" and that sending newsletters and memos only gives the illusion of real communication.

Steve discussed how to create a safe communication environment and gave numerous tips for improving phone and e-mail communications.

Continued on page 14

Keynote speakers, clockwise from left:
James Crawford *discusses the role of IT in healthcare;* ***Nathan Petschenik*** *reveals the formula for success in system testing;* ***Steve Kaye*** *examines communication skills;* ***Gopal Kapur*** *explains why it's never a good idea to mount afterburners on a mule; and personal trainer and fitness expert,* ***Trey Blaubach****, emphasizes the role of exercise in health and happiness.*

SCCTC Conference *Continued from page 13*

Following this, I heard **Chris Peduzzi** speaking on "Successful Navigation of Your PMO Ship in Cultural Waters." As a case study track, he spoke on his rich experiences of establishing PMO offices in company cultures that were very informal and not open to processes or project management. Chris outlined over a dozen success factors which included starting slowly, showing value to customers and building on success. He showed how to move from chaos to a managed environment without negatively impacting company culture.

Gopal Kapur, in his humorous keynote, "Mounting Afterburners on a Mule," showed how companies tend to buy expensive and often over-featured project management software while failing to provide the necessary training and foundation to support successful project management. He stressed the importance of training, soft skills and process first, then providing a tool that supports this environment at various levels: team, project management, general management, and sponsor.

The "Role of IT in Healthcare" keynote by **James Crawford** discussed how Kaiser Healthcare IT was transforming itself into an HRO; a high reliability organization. He explained how the use of technology was transforming a cumbersome, paper-based environment to an efficient system that improves patient care, speeds communication, curtails drug interaction problems and reduces cost.

Trey Blaubach's keynote on "Posture, Productivity and the Power of Determination" included high-energy audience participation as we learned the importance and benefits of exercise.

My interests led me primarily to project management topics, but for those with quality or security concerns, there was plenty to see. Topics included "How to Detect Project Fraud and Error," "Top Five Practical Methods for Securing Your Projects," "Is Your IT Function Meeting SOX Requirements?" and "Successful Software Reviews: the Key to Spending Less than Five Percent of Your Project in the Testing Phase."

Although there were many more speakers and lots more to see, I couldn't possibly cover all of it in this article. SCCTC was what a conference should be: relevant, educational and fun. As I drove away down Ocean Boulevard I couldn't help but think, "I can't wait until next year!"

Steven Sable, PMP

Chris Peduzzi

Above:
*SCCTC Conference Chair **Lora Lockwood, PMP** welcomes visitors.*

Representing PMI-OC

Above:
***Kristine Hayes Munson, PMP** is "Getting It Done,."*

Below:
***Marty Wartenberg** looks at "Scheduling and Managing Outsourced Projects."*

Left:
***Tom Cutting, PMP**, in full storybook regalia, talks about "The End of Fairy Tale Beginnings."*

Below:
A few of the dedicated sponsors and volunteers who made this conference possible.

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Six Saturdays Beginning September 16, 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.

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

September 16 October 14 October 28
September 30 October 21 November 4

Where:

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25205 La Paz Road
Laguna Hills, CA 92653

and

North Orange County
University of Phoenix
South Coast Learning Center
3150 Bristol Street
Costa Mesa, CA 92626

Cost: The workshop fee is per participant, payable at the time of registration. Classes fill very fast and cannot exceed 17 participants at each location (total 34, both locations). Get your registration and money in early to guarantee a seat.

Register by September 10 to receive a special discount!

- **PMI Member: $750 prior to Sept. 10, $800 after Sept. 10**
- **Non Member: $850 prior to Sept. 10, $950 after Sept. 10**

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.*

**Dates subject to change.*

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SEPTEMBER 9TH ADVANCED TOPIC

Creating Effective Risk Responses

Presented by Jan Birkelbach, PMP

Risk management becomes tricky as project managers attempt to interpret stakeholder risk tolerance and project characteristics in crafting effective risk responses.

In this seminar, we will review the considerations and a recommended process that can improve the effectiveness of risk responses in any type of project. The goal is to improve predictability when it pays to do so. The respective roles of people, process, technology and metrics as they impact our judgments and decisions will be examined as both sources of problems and solutions.

Attendees will be invited to apply some tools and techniques to a project scenario, so bring your calculators for more engaging problem-solving.

Jan Birkelbach, PMP manages and consults for a variety of project types, including business process improvement, computer hardware and software integration and deployment, strategic marketing initiatives and operational business planning, spanning more than 15 years.

He has managed in both staff and line functional capacities, as senior project manager, program director, managing consultant and in startup entrepreneurial roles. He started his career in the Peace Corps in Thailand. His industry experience is from his employment at Pacific Bell and financial services and technical professional services companies.

Mr. Birkelbach is an Instructor at the University of California, Irvine in Project Risk Management, Management of Multiple Projects, Business Analysis, Project Planning and Scheduling, Management of Information Systems Projects, Project Procurement Management, Earned Value, Project Evaluation and Selection, and PMP Certification Exam Preparation and Microsoft Office Project.

When:
Saturday, September 9, 2006,
8:00 a.m. to 12:00 p.m.

Where:
Keller Graduate School of Management
3880 Kilroy Airport Way, Room 207
Long Beach, CA 90807

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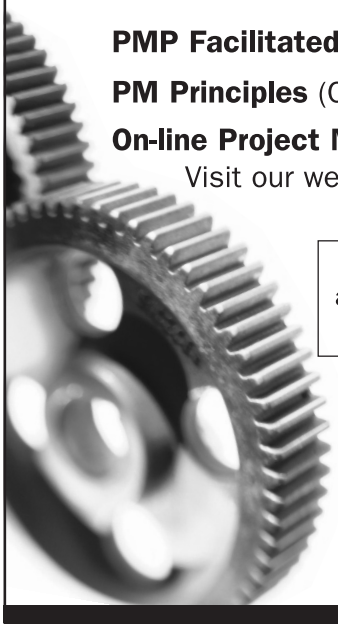

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Carolyn Wong

Thursday, September 21, 2006

Member/Volunteer Orientation Training

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 come join the Member/Volunteer Orientation Training session. Topics include:

PMI® Website	PMI-OC Website	Volunteer Opportunities
• Membership Profile	• Valued Programs	• Ambassador Program
• Components	• Event Registration	• Networking 101
• Logging PDUs	• Career Center	• More . . .

Meet the PMI-OC Board of Directors, your fellow members, and volunteers. We will present the value added benefits, professional development opportunities, and programs that PMI-OC offers to its members.

The number one benefit of your membership in PMI-OC is the vast pool of individuals to 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 these tips and pointers will improve your networking skills and enrich the experience measurably.

When: **Thursday, September 21, 2006**
6:00 p.m. to 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, Rooms C-110/111
Women's Opportunities Center/University Extension A UNEX (D7)
Quadrant D7, Building 232 on the UCI map:
Download map at http://today.uci.edu/pdf/UCI_06_Map.pdf

Directions: **Southbound:** Take 405 and make a **right** turn on Jamboree Road.
Northbound: Take 405 and make a **left** turn on Jamboree Road.
Next, make a left turn on Campus Drive, go past University Drive, past the Irvine Barclay Theater (on your right), and then turn right on Stanford into UCI parking lot SSPS. Then follow the yellow PMI-OC EVENT signs to the designated location.

Cost: Parking is $2.00 an hour.
Food provided at no charge.

Register: **www.pmi-oc.org**
Please register early. Space is limited to the first 40 members.

Questions: **E-mail: membership@pmi-oc.org**

PMI-OC Dinner Meeting

Tuesday, September 12, 2006

Program: **Business Continuity Programs: Keep It Clean and Simple!**
Presented by Thomas Stein

Location: **Wyndham Orange County**
3350 Avenue of the Arts
Costa Mesa, CA 92626

Schedule:
5:30 - 6:20 p.m. Registration/networking
6;30 - 7:20 p.m. Dinner
7:20 - 7:40 p.m. Announcements
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, September 10, to obtain the "in advance" price. Reservations made after 9:00 p.m. on September 10 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, September 10, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast Roundtable

Breakfast with Your SOX On

Thursday, September 14, 2006

Second Thursday of every month

Location: **Doubletree Hotel, Irvine Spectrum**
90 Pacifica Avenue, Irvine
Meritage Restaurant & Wine Bar

Time: 7:15 – 8:30 a.m.

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

Cost: Self-paid breakfast, parking is validated.

Photo Credits:

Page 3.....**John Fuchs, PMP**
Page 9.....**John Fuchs, PMP**
Page 11.....**John Fuchs, PMP**
Pan Kao, PMP
Pages 13-14....**Shirley Goodwin, PMP**

Friday, September 8

SoCal Pharma LIG Breakfast Meeting

The SoCal Pharma LIG is a new LIG that is getting established in this area. They will be holding breakfast meetings that are open to anyone who is interested in project management and works in the pharma, biotech, medical devices or life sciences industries.

They are free for PMI-OC members and free for non-members attending for the first time.

Presenters will be **Brenda Jenkins**, VP Clinical Operations, and **Charlotte Gardea**, Project Director at MDS. Topic will be Clinical Site Implementation: Insurance Policy vs. Contingency Planning.

When:
Friday, September 8, 2006
8:00 a.m. Breakfast
8:30 a.m. Presentation begins

Where:
Allergan
2525 Dupont Drive, Irvine, CA 92612

Future meetings will be held on October 13 and November 10 at locations that will alternate between Orange County and San Diego.

For more information, go to www.pmi-oc.org.

Answers to PMP® Exam Questions

From page 8

1. b. By subtracting the actual cost (AC) from the earned value (EV); CV=EV–AC
PMBOK® 2004, paragraph 7.3.2.3, page 173 [Controlling]

2. a. An operational definition
PMBOK 2004®, paragraph 8.1.3.2, page 186 [Planning]

3. d. Your customer has directed you to change the overall system design, for which the approved cost impact is $300,000.
PMBOK® 2004, paragraph 7.3.3.2, page 177 [Controlling]

4. c. A deliverable-oriented hierarchical decomposition of the work to be executed
PMBOK® 2004, paragraph 5.3, page 112 [Planning]

PMI Orange County MILESTONES
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Coming Events

SEPTEMBER 8 SOCAL PHARMA LIG
Breakfast Meeting
Allergan, Irvine
SEE PAGE 19

SEPTEMBER 9 ADVANCED TOPIC SEMINAR
Jan Birkelbach, PMP
Creating Effective Risk Responses
SEE PAGE 17

SEPTEMBER 12 DINNER MEETING
Tom Stein
Business Continuity Programs:
Keep It Clean and Simple!

SEPTEMBER 14 BREAKFAST ROUNDTABLE
Breakfast with Your SOX ON

SEPTEMBER 16 PMP FALL WORKSHOP BEGINS
South Orange County**:** Holiday Inn, Laguna Hills
North Orange County: University of Phoenix, Costa Mesa
SEE PAGE 15

SEPTEMBER 21 MEMBER/VOLUNTEER ORIENTATION TRAINING
SEE PAGE 18

OCTOBER 7 ADVANCED TOPIC SEMINAR
Diane Altwies, PMP
Overcoming Team Dysfunction

OCTOBER 10 DINNER MEETING
Craig Smith
Building the Great Pyramid, Project Management 2550 B.C
Annual Membership Meeting

OCTOBER 19-21 PMI NORTH AMERICAN LEADERSHIP MEETING
Seattle, WA

OCTOBER 22-24 PMI GLOBAL CONGRESS
Seattle, WA

LEGEND

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

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ORANGE COUNTY CHAPTER

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