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Three 2007 PMI-OC Fellows to Be Named

For the fourth straight year, PMI-OC will be honoring individuals who have demonstrated valuable and consistent involvement in our chapter by naming three PMI Orange County Chapter Fellows for 2007 at the December dinner meeting.

The first PMI-OC Fellow was **Edward Walker, PMP**, in 2004, followed by **John Bing, Quentin Fleming, and Marty Wartenberg** in 2005. **Janice Preston, PMP, Frank Reynolds, PMP, and Julie Wilson, PMP**, were 2006's chapter fellows. Julie is also a PMI® Fellow.

Recognition as a fellow is the capstone of a PMI-OC member's service. Each individual has made a significant contribution to PMI-OC and the project management profession. Fellows have volunteered in many ways, which may have included service on the board of directors, publication of articles, acting as mentors for the profession, encouraging others to become involved with PMI, presentation at the PMP® exam prep courses, serving on committees, sharing knowledge, connecting with other chapters, and taking part in PMI global activities.

Make a point of attending our festive December dinner meeting to find out who will be named. Meet the newest fellows and hear how you might enjoy the same advancement in your professional and personal life by your association with PMI-OC.

2007 CHAPTER BOARD

- Cornelius Fichtner, PMP**, Chair/President
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December 11 Dinner Meeting

Electronic Project Documentation: Legal and Practical Problems

Presented by **James G. Zack, Jr.**



James G. Zack, Jr. is Executive Director, Corporate Claims Management for Fluor Corporation, a \$20 billion per year engineering, procurement, construction and maintenance contractor with offices and projects worldwide. For more than 35 years, he has worked on construction projects and is a recognized expert in mitigation, analysis, resolution, or defense of construction claims.

Mr. Zack has worked throughout the United States, Canada, Egypt, China, Kazakhstan, and Trinidad and Tobago. He has been involved in more than 5,000 claims and has been designated as an expert witness in mediation, arbitration and litigation.

Mr. Zack is a Certified Construction Manager through CMAA, a Certified Forensic Claims Consultant through AACE International, a PMP, and is a Fellow of the Royal Institution of Chartered Surveyors.

The construction industry is rapidly evolving from paper to electronic project documentation. E-mail is replacing correspondence, meeting minutes, field memoranda, RFIs, etc. Filing cabinets are being replaced by local computer or web based servers. And, digital photography stored on computers is now taking the place of traditional project photography.

While electronic project documentation is technologically feasible with current hardware and software, it brings with it certain legal and practical challenges. This presentation will alert users to a number of legal issues surrounding e-documentation, address some practical issues that arise with electronic project documentation, and include a checklist of safeguards to avoid some of the potential pitfalls associated with project e-documentation.

December Vendor Showcase:
Caltech Industrial Relations Center
www.irc.caltech.edu. See ad on page 4.

Inside This Issue

| | |
|--|----|
| Spark of Love Toy Drive | 2 |
| The Chair's Column | 2 |
| January 8 Dinner Meeting | 3 |
| Mr. Cap "M" | 3 |
| Membership | 5 |
| Volunteer of the Month | 5 |
| New Milestones Co-Editor for 2008 | 5 |
| Project of the Year, Call for Nominations .. | 6 |
| November Dinner Meeting Review | 7 |
| At the November Dinner Meeting | 8 |
| 2007 PMI-OC Leadership Institute Review .. | 9 |
| PMP Exam Questions | 10 |
| November ATS Review | 11 |
| New Members, New PMPs | 11 |
| PMI-OC Plan for 2008 and Beyond | 13 |
| Volunteer Appreciation | 15 |
| PMP Exam Prep Workshops | 16 |
| Member/Volunteer Orientation Training .. | 17 |
| Coming Events | 18 |
| January and February 2008 ATS | 18 |
| 2008 PMI-OC Leadership Institute | 19 |
| Monthly Meetings | 20 |

Spark of Love



Right about now, you're probably feeling the stress of the holidays: the madness at the mall, the constant swipe of your credit card, the never-ending list of people to shop for... plus all the holiday pot lucks that have you cooking up a storm!

Now is the perfect time to step back and remember what's most important during the holidays. Maybe you love the tradition of having family all come together. Maybe you can't get enough turkey and all the fixings. Maybe you actually just enjoy having a week off work to go snowboarding.

Whatever the reason, now is also the time to remember what else is important during the holidays: giving to others. It may sound like a cliché, but helping bring a smile to a child or teen's face is one of the most important parts of the season.

The **December 11th dinner meeting** is the perfect opportunity to bring those smiles. By simply bringing an unwrapped toy or book, you will help PMI-OC and the Orange County Fire Authority's **Spark of Love Toy Drive**, which donates toys to thousands of needy families in the community.

To give you an idea of the need, the Orange County Fire Authority has distributed over 300,000 toys in a single season! Living in "The OC," it's easy to see the designer purses and luxury cars, but we need to look beyond that to the neighbors in our community who need a little extra help at this time of the year.

So join us in our toy drive by bringing an unwrapped toy or book for children/teens to our December dinner meeting. Give a little and gain a lot for the soul in return.

Tip: the toy drive is in extra need of toys for kids 8-14, who are often overlooked by toy drives.

Sabina Horigan, PMP
sabinaim@yahoo.com



Likelihood and Impact

It is hard to believe that a year has gone by since I became Chair/President of PMI-OC and began writing this column to share my experiences with you. This is my last column, and it is customary for the chair/president to write about the year in review. However, I have been struggling all day with that. You see, so much has happened to me personally since I last wrote to you that I find it hard to return to writing on the topic of project management and governing our chapter. My life has been upside down for almost four weeks, and I hope you will forgive me for deciding to use this space to write about that experience instead.

Have you ever considered the likelihood and impact of a disaster in your life? If you practice risk management on your projects, then you have probably thought about the likelihood of adverse events occurring and what impact they will have on your delivery date. But have you ever considered what effect such a disaster could have on you personally? Well... my wife and I did. We thought about it, and we planned for it. But when it struck, it hit me harder than I would have thought possible.

We moved to Orange County four years ago. We quickly realized that we were "country pumpkins" who couldn't live in a planned community like Irvine. So we looked around and found and bought a nice house in Silverado Canyon. We soon realized that even though there had never been a major fire in the canyon, it was only a matter of time. So we immediately enrolled in a disaster preparedness course put on by the local fire station. We prepared our emergency kits, made copies of all our important documents, and stocked up our food and water supply. We were ready.

On October 21st at around 6:00 p.m., I got two calls from colleagues who told me that the mountains were ablaze. I drove to the entrance of the canyon to take a look, turned around after just a glance, and 55 minutes later we had our car packed and were driving out. In moments like this, you just don't take chances. Especially if you have a sick wife and a guest at home.

Over the next two weeks, our lives became an emotional roller coaster. At first glance, it looked like the fire was heading away from our house, but because of a lack of resources that were deployed elsewhere, the fire was able to jump Santiago Canyon Road, destroy 15 structures in Modjeska Canyon and then slowly creep toward Silverado Canyon. The situation changed by the hour, and we were never quite sure whether or not our house was going to go up in flames. In the end, the fire stopped 400 yards from our home.

But when it rains, it pours. While we were evacuated, we had the good fortune to stay with close friends in Mission Viejo. Though they live in a nice, upper middle-class neighborhood, I woke up one morning in the second week to find my car window smashed and a bag stuffed full of recording equipment missing. It took a lot of restraint to hold back the tears of frustration. Instead, I just sat on the floor in a daze until the police arrived.

When we were allowed to return home, we found our house still standing. With the exception of a light dusting of ash throughout, there was no damage to the building that couldn't be repaired. However, the emotional damage is permanent. Having to spend two weeks in constant agony about whether or not you will lose all of your possessions is bound to leave a scar.

My deepest thanks go to the firefighters. Without them, we wouldn't have a home.

Cornelius Fichtner, PMP, Chair/President
Fire is the test of gold, adversity, of strong men.

What Happens When We're All PMPs?

Presented by Frank P. Reynolds, PMP, PMI-OC Fellow

Did you know that ninety-seven percent of PMI® members worldwide are PMPs?

What does that mean for the project management profession? What are the future problems and opportunities for individual PMI chapters? Where does the Certified Associate in Project Management (CAPM®) fit in? How do the numerous other project professional certifications impact others working in a project setting?

Frank's dinner meeting presentation will explore the implications of these questions and the future of project management, as well as summarize and evaluate concepts presented in his July 7th advanced topic seminar.

The July ATS considered the CAPM certification as a tool for spreading the influence of project professionalism and presented valid data about problems and opportunities confronting our profession and chapters. Project practitioners who create, publish, and/or present ways to gather and analyze data about our profession will accrue PDUs for their efforts. The ATS session began with introduction to a data-gathering tool that Frank developed to describe ten different roles of participants working in a project setting. The second activity introduced the variety of certifications promoted by nearly a dozen societies for professionals who work in a project setting. The third activity reviewed the CAPM program's importance to, and impact on, the diverse careers of project participants.

The concluding activity, which takes place at the January 8, 2008 dinner meeting, will give the July ATS participants an opportunity to share their experiences and discuss how they want to continue studying the questions raised.



Photo by Louie Chanco, PMP

Frank P. Reynolds, PMP, is one of the 2006 PMI-OC Fellows.

Under the title of Mr. Cap "M," Frank writes a quarterly column about the PMI-sponsored CAPM certification program. (See column at right.)

Frank has been an independent project management consultant since 1985. He is a principal with OuterCore Professional Development, LLC, and has consulted and trained extensively throughout the U.S., as well as globally, with frequent visits to China, Brazil, Poland, Spain, France and Dubai.

He earned a BA with Honors in Economics and an MS in Business Administration from CSULA.

Note:

Because of holiday printing schedules, January 2008 Milestones will not be delivered until after the January 8th dinner meeting.

See page 20 and www.pmi-oc.org for January dinner meeting information and registration.

Mr. CAP "M"

Section 2.2 Most Project Stakeholders are CAPM® Candidates

A series of columns by
Frank P. Reynolds, PMP

Consider this *PMBOK® Guide* excerpt, section 2.2, page 24.

"Project stakeholders are individuals and organizations actively involved in the project whose interests may be affected as a result of project execution or project completion."

Consider the *PMBOK® Guide* assumption that projects are often undertaken by one organization (the performing organization) to benefit another. CAPMs may also work in projects achieving the outcome in the customer project organization. The customer's job is to assure achievement of benefits from the project following project completion. CAPMs may also work in organizations performing sub-projects resulting from procurement by the delivering project organization and/or its client.

Consider the eight key stakeholders enumerated on page 26.

1. Project Manager. This stakeholder is the only one of eight currently expected to hold a PMP® certification.

2. Customer/User. In their roles in the acquisition of the project's product or in using the project's product, these individuals may benefit from a CAPM working as an SME (subject matter expert), a technical lead, a project lead, or in administrative roles.

3. Performing Organization. This organization may have some PMPs while offering opportunities to CAPM holders.

4. Project Team. In customer and provider project organizations, members may be required to hold CAPM certification.

5. Project Management Team. Participants are PMPs and CAPMs.

6. Sponsor. Owner and champion are complementary roles to the sponsor. PgMP®, PMP, and CAPM may be found in these responsibility areas.

7. Influencers. There is no question that individuals working in the customer, supplier, or performing organizations "can influence, positively or negatively, the course of the project." Such individuals are increasingly feeling the demands for understanding how to influence work conducted in a project setting.

8. PMO (Project Management Office). The executives and staff of such an organization may well have a career lattice progressing through CAPM, PMP, and PgMP



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Membership

Thoughts from the 2007 Membership Director

Remember, the Orange County Fire Authority **Spark of Love** toy drive is this month. (See article on page 2.) Please bring an unwrapped toy valued at \$10.00 or more to the December dinner meeting. This is a real two-for-one. (1) You get to meet the heroes from our recent fires, and (2) you can support their annual toy drive through your contributions.

Finally, I would like to tell you what a great experience it has been serving as your membership director this past year. As a chapter, we have made great strides, and I want to express my appreciation to everyone on the membership team who has worked so hard to make 2007 a successful year.

Sylvan Finestone, PMP

2008 Membership Director Position is Open

Cornelius Fichtner, PMP, recently tendered his resignation as the 2008 PMI-OC Membership Director. We thank Cornelius for his past contributions and look forward to continuing to work with him in the future.

The membership director holds a critical position: responsibility for strategic and tactical oversight of volunteer coordination, membership retention, the ambassador program, and member surveys. Each of these responsibilities is currently delegated to a leader with a dedicated group of volunteers supported by documented programs and processes.

The 2007 membership director will continue to serve until we identify a replacement. He will be available to transition all material to the new membership lead and will be available as a mentor.

If you want to be considered for the 2008 membership director appointment, please contact the Nominating Committee no later than December 15, 2007. Please submit the following information to nominations@pmi-oc.org: **name, contact information, PMI® number, and qualifications.**

Prior to submitting their information, all potential appointees should review and familiarize themselves with the PMI-OC Bylaws, which are posted on the PMI-OC website, www.pmi-oc.org, in the *About Us* section. The Nominating Committee will contact you to verify qualification status and to review the roles and responsibilities of the position.

New Milestones Co-Editor for 2008



As the editor of *Milestones*, I would like to announce that **John Sunderson, PMP**, has accepted the position of co-editor in 2008.

John and I will share the *Milestones* editorial responsibilities in order to maintain the high quality of the publication, to broaden our experience bases, to expand our resources, and to bring in more ideas with a fresh perspective to produce our very successful chapter newsletter.

John has been a dedicated PMI-OC volunteer. This year John has held the key position of volunteer coordinator.

Since last June, John has been assisting with the reviews for the PMI-OC advanced topic seminars and dinner meetings, proofing articles, and obtaining photo identifications for the dinner meetings and other events. John is eager to be a part of the *Milestones* team.

I am looking forward to continuing to work with John on *Milestones* in 2008. I am also looking forward to another great year for our PMI-OC newsletter.

Roger Lew, PMP

VOLUNTEER OF THE MONTH



Deen Patel, PMP

This month we continue the tradition (two months in a row) of recognizing a PMP® with global experience, **Deen Patel, PMP**.

Deen came over to the colonies in 1995 from the U.K. A member since January of this year and a PMP since June, PMI-OC recognizes Deen for his excellent job in managing this year's election process.

Deen worked with the election site vendor, board, Nominations Committee, and others to ensure all materials made it onto the site, and the site functioned throughout the election period. Finally, election results had to be collected and communicated to the board.

After receiving an overview of the project, Deen organized a team and kept the board up to date on progress. Deen's organization and communication skills have set a new standard.

Over the past eight years, Deen has been a VP of software development at two successive tech companies that were built almost from the ground up and successfully sold to larger, well established public and private software companies. He currently works as a director for the company that recently acquired the latter venture.

Deen's proactive approach and his willingness to assist others are evident. His infectious enthusiasm is communicated through the slight accent that he has retained. The Southern California weather also contributes to his sunny disposition. Deen does not miss the weather in the U.K. **Good show, Deen!**

Ralph Dutra

Photo by Steve Goto, PMP

CALL FOR NOMINATIONS



2007 PROJECT OF THE YEAR

The PMI Project of the Year (POY) Award recognizes the accomplishments of a project and the involved project team for superior performance and execution of exemplary project management.

Nominated projects must

- Have been completed and accepted as complete by the owner or client prior to nomination,
- Have met or exceeded owner or client needs as evidenced by a supporting letter from the owner or client,
- Have met or improved upon budget and schedule performance when compared to original budget and schedule goals,
- Have applied project management techniques in an original way, including innovative application of practices,
- Have advanced the technical aspects and image of the project management profession as demonstrated by effective application of the principles set forth in *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*, and
- Have utilized special management team actions to overcome the complexity of the project and unusual conditions, issues and barriers.

There are three levels of competition for the 2007 PMI Project of the Year.

Preliminary (Chapter) Level:

POY nominations must be submitted to PMI-OC no later than **January 27, 2008**. A PMI-OC panel of judges will select the chapter's nominee no later than March 3, 2008. The PMI-OC POY project manager will submit the nomination to PMI no later than March 17, 2008.

Semi-Finalist Level:

A PMI panel of judges will select three semi-finalists from nominees submitted by individual PMI chapters. The three semi-finalists will be selected no later than May 12, 2008 and will be submitted for finalist judging no later than June 2, 2008.

Finalist Level:

A final PMI panel of judges will select the 2007 PMI Project of the Year from the three semi-finalists. The award recipient will be selected on **July 17, 2008**.

For detailed project criteria and specific submission instructions, go to: <http://www.pmi.org/WhoWeAre/Pages/Project-of-the-Year-Award.aspx>

For chapter level details, visit www.pmi-oc.org, or e-mail POY@pmi-oc.org.



Deadline for Nominations:

Preliminary chapter level submissions are due no later than January 27, 2008. They are to be submitted to PMI-Orange County Chapter.

Who Should Participate:

Projects from throughout the world are encouraged to participate, regardless of size, industry type or location. PMI® affiliation is not necessary.

Who Can Nominate:

Anyone. Initial nominations should be made to PMI-OC.



The 2006 PMI-OC Project of the Year was awarded to Edison SmartConnect™ Advanced Metering Infrastructure (AMI).

The 2006 PMI Project of the Year was awarded to Kaiser-Hill Company's Rocky Flats Closure Project.

Seeing the Future of Leadership in the Present: Implications for Project Managers

On the evening of November 13, **Dr. Jerry Brightman** led members of this chapter through a dialogue to explore the attributes and assumptions that have been built around “leadership.”

To launch the discussion, Dr. Brightman challenged participants to think of a recent meeting they had attended. Who had played the greatest role in guiding the decisions that were made in that meeting? Was it the members who talked the longest, or the members who thoughtfully considered the information that was presented? What does this say about the efficacy of this decision making model? What does this say about our approach to communication?

Dr. Brightman’s position is that we can all become more effective leaders if we will just take the time to ask a few questions. To illustrate his point, he asked participants to divide into pairs and hold a discussion, structured as follows: Participant number one would launch a discussion by stating something he/she felt passionate about. Participant number two was permitted to only ask questions. At the end of the exercise, participants were encouraged to share their observations:

(1) It is easy to find common points of interest; (2) energy levels rise; (3) it is easy to engage someone when you show interest by asking the “good” question.

Dr. Brightman encouraged the audience to begin asking good questions, and asserted we would learn many new and interesting things. In fact, if one were to ask two more questions than normal, he would soon become a better leader.

From years of working with project managers, Dr. Brightman is convinced that we consistently under-rate our abilities and contributions. We normally consider ourselves “average,” whereas those who work with us will normally place us in the top 20 percent. This is important because self-awareness is the foundation of leadership.



Becoming a leader is a creative process. It is very hard to become a good leader, and that is why there are so few around. In fact, there is a critical lack of leadership today; just look in any newspaper. Why is this?

- Few companies take the time to develop leaders. Most people are hired because of a definitive set of skills, and they are promoted on their ability to survive within the corporate structure.
- Most of us are taught, at a young age, to conform to expected standards of behavior and thought. At around seven or eight, all of our creative essence is sucked out of us.
- We lose the trust that is so necessary to realizing our fuller selves. Trust is a magic elixir that helps people come to grips with their own personalities, with their own strengths and weaknesses. As we become more self-aware, we gain the freedom to grow. Without knowledge of our weaknesses, how can we leverage our strengths?

What traits mark a leader? Imaginative leaders make a company great, rather than just somewhat better. Managers are short-term and marginally effective. Leaders think longer-term and inspire people to see the larger picture.

Dr. Brightman described *The Fifth Discipline Field Book* as one of the greatest books ever written on leadership. In this book, the author, **Dr. Peter Senge**, discusses the five disciplines of a learning organization:

- 1. Personal Mastery.** Self awareness of who I am and what I stand for. Leaders know the difference between espoused

Continued on page 8



November Meeting Review

Continued from page 7

values and applied values. Leaders know what they stand for.

2. Building Shared Vision. It isn't so important what the vision "is;" it is what the vision "does" that makes the difference. A good shared vision will empower others. It is the role of the leader to share meaning and to create alignment within his team.

3. Mental Models. All assumptions need to be challenged. Only through open discussion can positions be examined, purified, and corrected.

4. Personal Mastery. The discipline of clarifying one's personal vision. It surpasses competency; it is what one is called to do or be.

5. Systems Thinking. This is the discipline that unifies all of the others as a single set of principles and practices. The lack of systems thinking explains why the IQs of a group always seem to be significantly lower than the average IQ of the participants.

All five disciplines need to be played together like an orchestra. Most of us fall short because we think in linear terms. We have such busy lives, and we struggle to get through the day; few of us take or have the time to go back to the beginning of a problem to see if we framed the original question correctly.

Make (not take) some free time to hold a discussion with your spouse or children. Make the time to get to know yourself, and you will become a better person and a better leader.

We need each of you to step up and choose to become a leader. Change something. Make something happen.

Norman Naylor, PMP

At the November Dinner Meeting



1. Lora Lockwood, PMP and Stephen June, PMP at the registration desk
2. Steve Matten, Ed Knopf, and Gregory Scott, PMP
3. Lynn Drury, PMP, Dan Husiak, and Caroline Jurado, PMP
4. Robert Perrine, PMP
5. Kerry Paulin and Jenny Zeleznik, PMP
6. Sabine Jenkins, PMP
7. Brian West, PMP and a colleague
8. Donald Barr, PMP, Brenda Breen, and Laura Deutschman
9. Steve Goto, PMP

PMI-OC Leadership Institute 2007



It's October 19, and we're gathering together to begin the final session of the 2007 PMI-OC Leadership Institute program. It's almost like attending a reunion; the initial hesitation and quietness from the first day are long gone. People greet each other much like missed friends, bonding over the shared disclosures and experiences. It's been an interesting journey, and we were now approaching the final two days of the class with eagerness and anticipation.

It's hard to describe exactly where this class will take you. The passage is different for each person, and the more you are willing to invest yourself, the more that you will learn and discover.

This session, entitled "Towards Leadership Wisdom," began with a review of our homework assignment to introduce ourselves via pictures, any type of picture. This exercise personalized each of us, presenting our private, not just professional, selves and set the tone for the next two days.

Throughout the two days, there were various breakout sessions and the opportunity to work with each of the 18 participants. These exercises ranged from discussions of what is leadership wisdom and how do you know you have it, to describing the eulogy at your own funeral, to coming to terms with your inspired self. Each of these discussions allowed us to explore our own personal character and the self-awareness needed for good leadership within a safe, non-judgmental environment.

The exercise, "Lost At Sea," was particularly insightful in addressing the value of group consensus. You're adrift on a sinking private yacht in the South Pacific; the yacht's on fire, and you have no clue about your location. There are 15 items that survived, and you must rank them in order of importance. First, we ranked them individually, and then we formed groups and worked through the necessary compromises to create a priority list.

The exercise highlighted value of group thought and determined which one of us you would want to be stranded with in a dire situation.

The two prior sessions were "Leadership Can be Taught and Can be Learned!" and "Discovering the Leader Within." Two great articles on each of these sessions appeared in the March and July issues of *Milestones*.

The 2008 PMI-OC Leadership Institute begins February 8. See page 19. Consider registering. It's an experience that can change your view of yourself, your career, your life.

Leadership isn't just taught; it lies inherent within us all. Are you willing to tap into it?

Here's to my fellow classmates, who are pictured below. We have truly become a community of leaders and learners.

Betsy Carey, PMP



Front row, left to right:

Lyn Shearer, PMP
Maryann Y. Yu, PMP
Chenni Sun
Kit Meader Brown, PMP
Luis E Orona, PMP

Second row, left to right:

Elizabeth "Betsy" Carey, PMP
Kristine Hayes Munson, PMP (*Chair*)
Linda Keller, PMP
Christopher Taylor-McCune, PMP
Susan Thompson, PMP
Carolle Dalley, PMP
Jack Zita, PMP
Victoria Flanagan

Third row, left to right:

Philip Chap, PMP
Brent Felsted, PMP
Tom Wilhelm, PMP
Dr. Jerry Brightman (*Facilitator*)
Ed Nauman, PMP

Not pictured:

Sharon Welden, PMP
Nick Saikali, PMP, (*participant only*)

Photo by Benjamin Munson

Test Your Knowledge on PMP Exam Questions

Here is a sample of some questions:

1. You are managing a project under contract to provide a client with a high-speed wide-area network, involving interoperable personal computers, servers and data storage systems, as well as the development and customization of the requisite software. Since there are periodic progress payments, your client requires comprehensive, but easy-to-understand, progress reports. However, during project execution, your client informs you that there is an abundance of detailed technical computer-related jargon, which obscures an understanding of what has been accomplished. This situation could have been avoided by:
 - a. Applying an organizational breakdown structure
 - b. Applying the risk management plan developed for this project
 - c. Developing a mutually-agreed upon communications plan
 - d. Retaining an expert report writer
2. Municipal regulations require that before excavation can commence for a new shopping mall, approval is needed for an environmental impact report submitted by your company. Based on past experience with similar situations and because time is of the essence, as project manager, you have decided to take the risk of starting the excavation effort two weeks before approval is expected to occur. This scheduling technique is called:
 - a. Management by exception
 - b. Resource leveling
 - c. Fast tracking
 - d. Crashing
3. Your company was just awarded a contract for upgrading a nuclear power plant. Expected project completion is about four years. You and your client have mutually agreed that it would be difficult to plan too far into the future. It is further agreed to decompose the project into phases and perform detailed planning only for the near-term work, about 12 to 18 months. Additional planning for the next phase will commence as better

visibility of progress manifests itself. This process is repeated for all subsequent phases. This technique is sometimes referred to as:

- a. Long-term planning
 - b. Resource leveling
 - c. Rolling wave planning
 - d. Multiple project planning
4. A workaround is:
 - a. A proactive, planned method of responding to risks
 - b. An unplanned response to a risk event that was unidentified or accepted passively
 - c. A specific response to risks defined in the risk management plan
 - d. Applying an existing contingency plan

Answers are on page 13

This is my final PMP® Exam Questions column for *Milestones*. It's been a long and fruitful journey, and I've enjoyed it immensely.

This column is in harmony with my personal mission statement: "To internalize a feeling of accomplishment by sharing the hard-won wisdom I have acquired in my life; and as my legacy to embed that wisdom into as many critical thinking people as I can influence."

Dave Jacob

Editor's note: Dave Jacob has been providing the PMP Exam Questions since 1999, soon after the first PMBOK® was published. I have benefitted from Dave's questions before and after becoming a PMP.

Beginning with the January 2008 issue, **Diane Altwies, PMP**, will submit the PMP Exam Questions column for *Milestones*.

Roger Lew, PMP



Happy Holidays from
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Treating Innovation as a Project

On November 3, **Martin (Marty) Wartenberg, PMI-OC Fellow**, presented an outstanding Advanced Topic Seminar for PMI-OC. His opening brain teasers included:

Everyone in the class knew that Marty's presentation was going to contain some thought provoking ideas. His presentation was an encapsulation of how innovation and creativity can be used to invigorate an organization via the use of its project management team.

**Step
it**

Marty asked the class to examine the difference between "creative" and "innovative." Creativity is important to an organization to keep it evolving and generating new products or services. Innovation is necessary to produce products better and faster than the competition. Another aspect of a project is selecting team members when you do something new. When you start a project, having negative people on board can be instrumental in creating the project charter, but only for creating the charter. For most of a project, you want to always select positive people. Creativity and innovation flourish in positive people.

Marty told us a lot about a company called IDEO, Inc., that develops ideas into useful products like the iPhone. He also presented several research results that demonstrated how creativity is more predominant and frequently used until about age eight. Society generally inhibits creative and innovative urges, but they surprisingly re-surface around the age of 60.



Top of page: Innovation as a mirror of the project manager

Above: **Marty Wartenberg** in action; Marty and **Moshe Cohen, PMP**, recall a project known for its innovation; the ATS team: **Bob Pettis, PMP**; **Reza Bourbour, PMP**; **Louie Chanco, PMP**; **Judith Berman, PMP** and **John Sunderson, PMP**

Photos by Louie Chanco, PMP



This presentation was both interesting and enjoyable. It included information about the creative process, such as the "Four Stages in the Creative Process" (awareness, incubation, illumination, and verification). Marty's experiences at multiple companies where he has worked add real world validation to the information he presents. The class exercises brought his points home in a "first hand" manner.

John Sunderson, PMP

NEW MEMBERS

Sandra Blanco
Richard Bown
Tim Bryan-Montanez
Jeffrey Carter
Daniel Cicchetti
Linda Davies
Robert Domenick
Marshall Gibson
Sandra Haine
Bradly Hansen
Richard Hendry
Rachel Joy Ingel
Harvey Kertland
Sergey Krasnov
Tongyue Li
Otoniel Lopez
Lan Lu
Michael Merchant
FNU Milligan-Hammer
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PMI-OC Plan for 2008 and Beyond

Every year the chapter follows a formal strategic planning process, seeking input from our membership, volunteers, and other resources. We want to update you on our progress and summarize the 2008 PMI-OC strategy.

We began the annual planning process with our membership survey to understand your needs. Then we assessed the survey results and our current chapter state to refine our long term vision for 2009.

After which, the 2007 and 2008 boards of directors conducted an off-site planning session in Santa Ana on Saturday and Sunday, November 3 and 4. Given that the purpose of this annual off-site is to set the strategy for 2008 and to integrate new board members, this is a critical step on our annual planning process. The weekend was filled with group and breakout working sessions and team building exercises. As a result, we confirmed our 2009 vision and defined the 2008 strategic objectives and initiatives.

One key change this year was the addition of our volunteer leaders (second tier) to the Sunday afternoon session. The purpose of this special afternoon session was to jump start individual area planning, help empower the second tier, facilitate understanding of the chapter strategy, and include them in creating the plans. Currently, the 2007 and 2008 boards are in the process of creating 2008 area plans and budgets, which are to be finalized by the end of 2007.

Our 2008 PMI-OC Strategy

In creating our strategy, we adopted the guiding principle of KISS: Keep It Short and Simple. This was inspired by our advisory council coaches and intended to help us create a focused strategy and manageable set of strategic and operational projects. Each strategy component builds on and aligns with the others.



Our 2009 vision defines what we want our chapter to look like by the end of 2009. Our vision is to evolve a stronger community by developing a close connection with our members, continuing to deliver high-quality offerings, enabling a decentralized and changing environment, and progressing our chapter maturity. As the diagram at the left depicts, we identified priorities for each of the four "spokes" of this vision: member value, members, offerings, and infrastructure.

Two Strategic Objectives to Achieve Our 2009 Vision

- 1. Differentiated Membership Value.** Professional relationship building, professional development, member-specific benefits
- 2. Operational Effectiveness.** Franchise key business processes, develop/empower operational leaders, enable internal collaboration, and enable strategic and operational balance.

Three Strategic Initiatives to Accomplish Our Vision and Strategic Objectives

- 1. Enable Operational Leadership.** Create an operational environment that is consistent, efficient, supports leadership succession, and focuses on processes and documentation.
- 2. Redesign Governance Model.** Change our organization structure and governing processes to empower operational areas while enabling strategic focus.
- 3. Recommend a Platform for Virtual Collaboration.** Analyze opportunities to provide remote offerings and enable online collaboration to increase member value and operational efficiencies.

To achieve our vision and strategy, the directors are now working on the plans for their specific areas. They need resources to staff these plans. Be part of our vision! Help make this vision a reality. Contact a board member to help get us started now.

Kim Fields, PMP, Director at Large
Victoria Flanagan, Chair-Elect



Top to bottom: Chair-Elect **Victoria Flanagan**; 2008 Marketing Director **Linda Keller, PMP**; Key Volunteers **Bob Pettis, PMP**; **Derek Barraza, PMP**; **Deen Patel, PMP**; **Roger Lew, PMP**; and 2007 Marketing Director **Brent Felsted, PMP**

Photos by Steve Goto, PMP

PMP Exam Answers

From page 10

- 1. c. Developing a mutually agreed upon communications plan**
PMBOK® 2004, paragraph 10.1.3.1, page 227 [Planning]
- 2. c. Fast-tracking**
PMBOK® 2004, paragraph 6.5.2.3, page 146 [Planning]
- 3. c. Rolling wave planning**
PMBOK® 2004, paragraph 6.1.2.3, page 128 [Planning]
- 4. b. An unplanned response to a risk event that was unidentified or accepted passively**
PMBOK® 2004, paragraph 11.6.3.3, page 267 [Monitoring and Controlling]

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Volunteer Appreciation

Special volunteers were invited to attend an event on Monday, November 5th, to honor, recognize, and thank them for their contributions to PMI-OC.

Honorees were treated to a recognition dinner at Dave and Buster's at the Block in Orange. Despite the traffic challenges, attendees arrived in good spirits and in a festive mood. Although the crowd was a bit smaller than expected, they made up for it with enthusiasm. Happy hour may have also contributed.



are being withheld to protect the innocent and the not so innocent.

Thanks to all of our special volunteers and a special thanks to those who were able to participate and enjoy an event in their honor.

The caliber of our volunteers is testimony that volunteering contributes to quality professional development and networking opportunities for our members.

Your Volunteer Coordinator
Ralph Dutra

Our Special Volunteers

Front row, left to right:

Brent Felsted, PMP
Linda Keller, PMP
Charlotte Salisbury, PMP
Joe Paradiso, PMP
Nora Goto, PMP
Ralph Dutra
Carla Poulin, PMP
Sabina Horigan, PMP

Back row, left to right:

Robert Pettis, PMP
Judith Berman, PMP
Roger Lew, PMP
Peter Librojo, PMP
Patty Tutor, PMP
Lori Shapiro, PMP
John Sunderson, PMP
Louie Chanco, PMP
Mary Kipinski, PMP
Glen Fujimoto
Cindy Pham, PMP

Photos by Steve Goto, PMP



The event was hosted by our venerable membership director, **Sylvan Finestone, PMP**. Your volunteer coordinator served as the MC. The program began with opening remarks and a welcome by Sylvan, who touched on the value of our volunteer contributions. The MC then began the "formal" slide presentation, starting with administrative notes, rules, and regulations. He reminded the crowd to be camera ready at all times, and to ask themselves an important question, "Why did I volunteer?" and to have FUN.

Not wanting to miss an educational opportunity, a slide was presented that depicted the volunteer management cycle, which is the central idea of volunteer management theory. This was intended to be a thought provoking slide to add perspective to why we volunteer. However, the crowd's enthusiasm was visibly diminished for a few moments. One PDU was verbally awarded by the MC to those who were able to view the slide rather than turn away. Enthusiasm and smiles were quickly restored.

A brief discussion on volunteerism was presented. A Garfield cartoon portrayed the value of our volunteers. A reclining Garfield thinks, "If you're patient and you wait long enough, nothing will happen." Without our volunteers, nothing would happen. THANK YOU, volunteers, for answering the call rather than sitting back and letting somebody else do it.

Before moving on to volunteer recognition and the prize raffle, each attendee was asked to jot down a brief response on a note card to answer the question, "Why did I volunteer?" Each raffle winner would be required to present a completed note card in order to collect a raffle prize. Note cards became the property of the PMI-OC Volunteer Coordinator and may be used to encourage continued volunteerism.

The raffle prize drawing was well received, and valuable insight was gained from the note cards presented. The "F" word was used in several of the responses. Of course, I mean FUN. One response simply stated "because it feels good." Names of respondents

Learn for Project Management

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

MANAGEMENT OF INFORMATION TECHNOLOGY PROJECTS

Wed., 6:30-9:30 pm, January 9-March 12, 2008
Reg #073-MBJ-J01

QUALITY AND PERFORMANCE MANAGEMENT

Thurs., 6:30-9:30 pm, January 10-March 13, 2008
Reg #073-MBJ-J05

PROJECT LEADERSHIP, COMMUNICATION AND TEAM BUILDING

Tues., 6:30-9:30 pm, February 19-April 22, 2008
Reg #073-MBJ-J03

NEW PRODUCT DEVELOPMENT

Thurs., 6:30-9:30 pm, February 20-April 23, 2008
Reg #073-MBJ-J04

All classes are taught in Riverside.

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PMI Orange County Chapter Announces Its 2008 Winter Course



PMP EXAM PREPARATION WORKSHOP

Six Saturdays Beginning February 2, 2008

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

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

February 2 February 23 March 8
February 9 March 1 March 15

Where: Laguna Hills

Holiday Inn
Laguna Hills
25205 La Paz Road
Laguna Hills, CA 92653

Costa Mesa

University of Phoenix
South Coast Learning Ctr.
3150 Bristol Street
Laguna Hills, CA 92653

Brea

Embassy Suites
Brea, North Orange County
900 East Birch Street
Brea, CA 92821

Cost: The workshop fee is per participant, payable at the time of registration. Classes fill very fast, so get your registration and money in early to guarantee a seat.

Register by January 15 to receive a special discount!

- PMI Member: \$750 before Jan. 15, \$800 after Jan. 15
- Non Member: \$850 before Jan. 15, \$950 after Jan. 15

Register at www.pmi-oc.org

Information at www.pmi-oc.org or e-mail programs@pmi-oc.org



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

PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING

November PMI-OC Member/Volunteer Orientation Training was held on the seventh this month at the UCI Learning Center in Orange, near The Block shopping area.

Although there were fewer attendees than usual, the room was filled with enthusiasm. It is always encouraging to see new and returning members eager to learn what PMI® and the Orange County chapter have to offer. In addition to the members, there was a non-member in attendance who appeared to have more interest in joining after the event than before. Personally, I found this response to be rewarding and what makes volunteering well worthwhile.

In addition to this diverse and dynamic group, four very supportive and dedicated volunteers attended, and without them this event would never be successful. When one has a cause that they feel is so beneficial and helpful, there is no better feeling than having the team at your side to help support your cause. This level of satisfaction is what volunteering is all about.

Speaking of volunteers, we have to remember that the “V” in MVOT is all about volunteering. **Ralph Dutra**, our volunteer coordinator explained how to become a volunteer, the current opportunities, and why this organization depends on volunteer involvement to run as well as it does.

Victoria Flanagan, our chair-elect, discussed the new PMI website and what services PMI has to offer at a global level. There were several questions about special interest groups (SIGs), which Victoria discussed in detail.

One of the strengths of the Orange County chapter is the networking opportunities available at the dinner meetings and other events. To learn more about how to network while at these events and develop your networking skills, **Melanie McCarthy**, from ResourceXperts, is the expert. Melanie explained that there were several valuable tools for networking that everyone should know. Especially, those of you in transition should attend this presentation and take good notes, because you never know whom you will meet and who will help you land that next job.

The meeting was concluded with questions and answers of all types with ample opportunity for members to speak one-on-one with each other, directors and membership staff.

The meeting location is easy to find by following the directions on the PMI-OC web site or the URL at the right. There is always plenty of food and soft drinks for those coming straight from work, and quality of the food is always tops.

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

See you at the next MVOT.

Joe Paradiso, PMP
Membership Committee Chair

Wednesday
January 16, 2008

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 join the Member/Volunteer Orientation Training session.

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.

When:

Wednesday, January 16, 2008

6:00 p.m. to 8:30 p.m.

Registration will begin and food will be served at 6:00 p.m.

Program starts at 6:30 p.m.

Where:

UCI Learning Center, Orange Room 203

200 South Manchester Avenue
(Corner of Chapman and Manchester)
Orange, CA 92868

A map can be found at the following URL:

<http://unex.uci.edu/services/contacts/locations/ucilc/>

Cost:

None. Parking is free, but required permits are available on the second floor.

Register:

www.pmi-oc.org

Please register early. Space is limited to the first 40 members.

Questions: membership@pmi-oc.org

Coming Events

December 11 Dinner Meeting

Jim Zack, PMP
Electronic Project Documentation
Spark of Love Toy Drive
PMI-OC Fellowship Awards
See page 1.

December 13

Breakfast With Your SOX On
See page 20.

December 14 SoCal Pharma LIG

Breakfast Meeting: Amylin, San Diego
Webcast: MDS Pharma, Irvine
For information and registration, go to:
http://www.pmi-oc.org/spevent_detail.asp?Ev_ID=594

January 5, 2008 Advanced Topic

Tim Hohmann, Galorath Incorporated
Project Portfolio Management Planning
See column at right.

January 8, 2008 Dinner Meeting

Frank Reynolds, PMP
What Happens When We're All PMPs?
See page 3.

January 10, 2008

Breakfast With Your SOX On

Jan. 11, 2008 SoCal Pharma LIG

Breakfast Meeting: Details TBA

January 16, 2008

Member/Volunteer Orientation Training
See page 17.

February 2, 2008 Advanced Topic

Kristine Hayes Munson, PMP
The Sixth Time's a Charm
See column at right.

February 2, 2008

PMP Exam Prep Workshops Begin
Laguna Hills, Costa Mesa, Brea
See page 16.

February 8, 2008 Special Event

PMI-OC Leadership Institute 2008
Facilitated by Dr. Jerry Brightman
See page 19.

February 12, 2008 Dinner Meeting

Frank Addeman, Walt Disney Imagineering
Simplifying Complex Fast Track Projects
Using 4-D Scheduling

February 14, 2008

Breakfast With Your SOX On

Note: Coming events may be subject to change.

ADVANCED TOPIC SEMINARS

SATURDAY, JANUARY 5, 2008

Project Portfolio Management Planning

Presented by **Tim Hohmann**

Information technology (IT) departments are between a rock and a hard place these days. Budgets are shrinking while the dependence on IT products and services is increasing. The pressure to choose the right projects that will save money, increase sales, or result in enterprise-wide efficiencies is greater than ever. And yet, the majority of Global 1000 companies are still prioritizing project funding either by the first come/first served method, the squeaky-wheel method, the highly political method, or the ever popular cost/benefit method.

This seminar describes techniques and tools for choosing which IT projects get funding based on more than just one or two parameters; rather, each project should be analyzed holistically, looking at a number of factors: cost, life cycle, scope, risk, effort and return/utility being just a few. By analyzing projects holistically, they can be more accurately prioritized when compared to business goals. CIOs, IT directors and project managers can then make wiser and more insightful decisions about which projects will contribute to an organization's financial and long-term business success.

Tim Hohmann has over 25 years of experience in estimation and management of technology projects. He is currently Director of Professional Services and Training at Galorath Incorporated, a leading provider of parametric estimation and decision support tools. He offers training and consulting support in estimating scope, schedule and effort requirements for large scale technology programs.

SATURDAY, FEBRUARY 2, 2008

The Sixth Time's a Charm

A Long-Term Approach for Implementing a Successful Organizational Change

Presented by **Kristine Hayes Munson, PMP**



Have you ever been told the only constant in the business world is change? When was the last time you led a change in your organization, such as implementing a PMO or rolling out a new

application? Was that change successful? Senior management expects technology professionals to successfully implement organizational change as part of their daily responsibilities. Together, we will discuss tactics to continuously introduce small, iterative changes rather than a "big bang" change, including how to help individuals deal with change-related loss and implementing Theory-U in change planning. Be prepared to share your success stories, as well as your learning experiences.

Kristine Hayes Munson, PMP is a leader with seventeen years of experience in successfully completing IT projects in the finance, printing, and construction industries. Kristine currently leads a quality assurance/configuration management team for a 125-member financial services IT department.

Kristine is an active PMI-OC volunteer. She served on the board of directors for six years in various roles, including two terms as chair/president. She currently chairs the PMI-OC Leadership Institute committee and was named the 2006 Volunteer of the Year in recognition of her efforts.

Where: Keller Graduate School of Management
880 Kilroy Airport Way, Room 227, Long Beach, CA 90806

PDUs: There are four PDUs for this event.

When: First Saturday of every month, 8:00 a.m. to 12:00 p.m.

Cost: In advance: \$45 members, \$50 non-members
At the door: \$60 for both members and non-members

Information: www.pmi-oc.org

PMI-OC Leadership Institute 2008

BEGINNING FEBRUARY 8



The Project Management Institute-Orange County Chapter and The Leadership Group are proud to announce the second annual PMI-OC Leadership Institute.

The PMI-OC Leadership Institute is a year-long advanced leadership training program offered to PMI-OC members and non-members to enable them to become more competitive in a global environment.

The program is designed to build core leadership depth and will provide valuable leadership feedback from an objective 360-degree basis. Participants will develop the comprehensive coaching and feedback skills needed by future global leaders.

The PMI-OC Leadership Institute will reflect leadership development programs offered by Fortune 500 companies, including personal leadership assessment, skills building, peer networking, discussion and mentoring.

Program Structure

February 8-9, 2008, Session One 16 PDUs

Foundations: Leadership Can be Taught and Can be Learned!

An introduction to many leadership aspects, including understanding of self, knowing personal and organizational values, creating a shared vision, developing successful strategies, and systems thinking.

360-degree Assessment Debrief 1 PDU

One-on-One Debrief

Participants complete a SKILLSCOPE® 360-degree assessment instrument. Results will be discussed in individually scheduled hour-long coaching sessions with our facilitator, **Dr. Jerry Brightman**.

May 16-17, 2008, Session Two 16 PDUs

Discovering the Leader Within

Participants will begin to build effective and meaningful leadership development plans based on 360-degree instrument results, in addition to delving deeper into different leadership aspects.

October 3-4, 2008, Session Three 16 PDUs

Towards Leadership Wisdom

Participants now become involved in action learning. They will be able to apply newly discovered skills acquired and learned throughout the program.

November 11, 2008, Leadership Success 1 PDU

Leadership Success. Participants will be recognized for their successful completion of the program at the November 11, 2008 PMI-OC dinner meeting. The keynote speech will be delivered by a recognized leadership speaker.

Dr. Jerry Brightman, designer and facilitator of PMI's first four Leadership Institutes, is president of The Leadership Group (TLG). TLG helps 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 worked with a number of prestigious global clients in Singapore, Italy, Russia, Colombia, Canada, the U.K., France, Costa Rica, Mexico, Argentina, Brazil, Venezuela, and throughout the United States.

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.

We are honored to welcome Dr. Jerry Brightman as facilitator of PMI-OC's second annual Leadership Institute.

Only
\$50.00
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For
Members

Total PDUs: 50

Program will be limited to 25 participants.

Total cost: PMI-OC members: \$2,500
Non-members: \$2,900
PMI-OC volunteers: \$2,000

PAYMENT OPTIONS. Three separate payments or one large payment.

Three payments: Your credit card will be charged for the first payment only. When registration opens, the same card will be charged for the additional fees.

Payment breakdown: Members: Session One and 360 Review, \$1,200; Session Two, \$650; Session Three \$650.

Non-members: Session One and 360 Review, \$1,400; Session Two, \$750; Session Three, \$750.

Go to www.pmi-oc.org for registration information.

PMI Orange County MILESTONES

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PMI-OC Dinner Meetings

Tuesday, December 11, 2007

Program: **Electronic Project Documentation: Legal and Practical Problems**
James G. Zack, PMP

Tuesday, January 8, 2008

Program: **What Happens When We're All PMPs?**
Frank P. Reynolds, PMP, PMI-OC Fellow

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

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

Cost: **Dinner and Presentation**

| | | | |
|--------------------|---------|---------------------|---------|
| <i>In Advance:</i> | | <i>At the Door:</i> | |
| Members | \$30.00 | Members | \$40.00 |
| Non-Members | \$35.00 | Non-Members | \$40.00 |

Featured Presentation Only (Members and Non-Members)

| | | | |
|-------------------|---------|--------------------|---------|
| <i>In Advance</i> | \$15.00 | <i>At the Door</i> | \$15.00 |
|-------------------|---------|--------------------|---------|

Parking: \$3.00 per car

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 the Sunday before the dinner meeting for the "in advance" price. Reservations made after this time will be charged the "at the door" price.

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Anyone who cancels their reservation after the Sunday before the dinner meeting, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast with Your SOX On

Thursday, December 13, 2007

Doubletree Hotel, Irvine Spectrum
7:15 – 8:30 a.m.

Second Thursday of every month
Registration: kevinmerr@earthlink.net



Project Management Institute
Orange County Chapter, Inc.
P. O. Box 15743
Irvine, CA 92623-5743