January 8, 2008 Dinner Meeting

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.

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.

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.

In This Issue

THE CHAIR'S COLUMN

PMI-OC Enters Its 19th Year!

Time flies. It seems like we just finished celebrating our chapter's 15th anniversary although that milestone was in 2004, the same year PMI® celebrated its 35th anniversary. Our chapter has left some impressive tracks to date, especially relative to other PMI components, as well as to other professional associations. Thank you to everyone who helped make PMI-OC what it is today, and a special thank you to our 2007 BOD and volunteers for their efforts and achievements over this last year.

And this brings us to a new year! I hope you, your family, and friends all enjoyed the recent holidays. I am proud to be on the PMI-OC BOD again this year. I served in a variety of BOD positions over these past five years which I know will help me in my new role as Chair.

We have a great mix of professionals on our 2008 BOD – including five of us returning to the BOD (**Kim Fields, PMP; Sylvan Finestone, PMP; Nora Goto, PMP; Lora Lockwood, PMP;** and myself) and three new to the BOD (**Linda Keller, PMP; Tariq Shaikh, PMP**; and **Renata Weir**). As of writing this article, the Membership Director position remains open, and the BOD targets to appoint a replacement this month (January). Also, we have a number of strong volunteers continuing this year to help us achieve our chapter goals.

2008 Plans

Building on our achievements to date, we have exciting plans for 2008 to help us take our chapter to the next level. As you may have read in last month's *Milestones* article entitled "PMI-OC Plan for 2008 and Beyond," the focus of our 2009 Vision is to evolve a stronger community – specifically, to develop a stronger connection with our members, continue to deliver high-quality offerings, enable a decentralized and changing environment, and progress our chapter maturity. Our two strategic objectives, or desired outcomes for this vision, are: Differentiated Member Value, and Operational Effectiveness. Helping us achieve our vision and strategic objectives are our three strategic initiatives: (1) Enable Operational Leadership, (2) Redesign Governance Model, and (3) Recommend a Platform for Virtual Collaboration.

So, what does this mean to you as a member? Translation, we realize that as professionals these days it is even more difficult to maintain a balance in life while trying to achieve our business goals. As a result, the 2007 and 2008 BODs determined for our 2009 Vision and 2008 plans that we need to focus on delivering offerings relevant to your current needs and work environments and be innovative in what offerings we deliver and how we deliver them. Of course, we will be making improvements to our current offerings, how we are organized, and how we operate. One key example that impacts you more directly as a member is: with our crazy work and personal schedules and long daily commutes, remote offerings are in greater demand. One of our key projects this year is to redesign our website which will be a base for us to provide you new and improved communications and remote offerings. The first and in-process component of the new site is a new event calendar/registration capability. We will provide more information on these efforts throughout the year.

Another change is we are moving our monthly dinner meetings to the Doubletree Hotel Orange County Airport in Santa Ana. The target is April at this new venue. We will communicate more details soon.

We can always use additional assistance, i.e., volunteers! Volunteerism is a fantastic opportunity for you as a professional, and it is what has made our organization such a success. There are often openings that we have not yet posted formally, for pending projects, and to backfill existing positions. Contact a BOD member or volunteer lead for more information or to get involved. I look forward to working and connecting with you this year.

Victoria Flanagan
Chair/President

Ralph Dutra

This month I had the unique task of interviewing myself. It was challenging to schedule a meeting with myself to ask insightful, probing questions and to separate fact from fiction.

Ralph discovered PMI-OC during his research to identify a new career path. In July, an opportunity to work with the membership team presented itself. Since then, Ralph has served as your volunteer coordinator helping match members with volunteer positions. He has supported the ambassador program, participated in M/VOT sessions and assisted with the 2007 Spark of Love toy drive. Most recently, he planned and hosted a volunteer appreciation event for our special volunteers.

The volunteer experience continues to be enjoyable as his job search moves ahead. Volunteering continues to provide networking opportunities and new resources while supporting the chapter. Of course, Ralph referred to the **fun factor**. "Just gotta have fun. Otherwise, it's not fun. Am I right?"

Take a test to learn more about Ralph.

1. Ralph has:
   a. Resided in Southern California since 1988
   b. A supportive spouse of 38 years
   c. Two adult children and a 22 pound dog
   d. All of the above

2. The dog's name is:
   a. Fluffy
   b. Zoe
   c. Snowball
   d. Pmbok

3. Volunteering has resulted in:
   a. Lots of new lingo in Ralph's vocabulary
   b. Positive examples of the PM process in action
   c. Learning how the chapter works to support members
   d. All of the above

4. Which is not true about Ralph?
   a. Likes to meet members
   b. Enjoys hearing complaints from people unwilling to help solve problems
   c. Bathes regularly, except when camping
   d. Has goal of matching his skills and experience with a PM position

Answers: d, b, d, b

Ralph was sincerely appreciative of the recognition. He stated that it is always a positive experience to work with folks whom he respects and enjoys supporting.

Ralph Dutra

Left: Ralph receives a certificate of appreciation from PMI-OC Chair **Cornelius Fichtner**, **PMP**.

Below: Ralph leads the audience in "the wave."

Photos by Steve Goto, PMP

Membership

It's January, the month when people write about the year that just passed. Who am I to buck tradition? So here goes with the membership recap.

Our volunteer coordinator, **Ralph Dutra**, has brought energy and enthusiasm to his role. Many of you have enjoyed his public persona at dinner meetings, but few of you have seen the long hours and attention to detail Ralph contributes each month to keep up with the volunteer needs.

Thanks to **Sabina Horigan**, **PMP**, and her team of volunteers, the Spark of Love toy drive held in conjunction with the Santa Ana Fire Department at the December meeting was a big success. See article on page 7.

Our volunteer fill rate is at an all time high, with only a very few identified positions open, which is another successful achievement for Ralph Dutra. See current volunteer opportunities on page 7.

The Member Volunteer Orientation Training (MVOT), chaired by **Joe Paradiso**, **PMP**, has been offered six times this year. This event introduces our chapter and programs to new members while giving them a full view of the chapter's opportunities. With **Lillian Sibley** and **Lilly Brady**, **PMP**, Joe has also built a proactive member retention program to contact members coming up for renewal.

Our ambassador program under **Lori Shapiro**, **PMP**, has been re-invigorated this year. We have new ambassadors and a new mission for the ambassador program. If you would like to know more, please talk to Lori, **Brenda Breen**, or **Charlotte Salisbury**, **PMP**.

We have one final person who works remotely, but does a fine job of keeping our statistical data. **Evelyn Brooks, PMP**, lives in Los Angeles, but always helps us out with our monthly statistical reporting.

Sylvan Finestone, **PMP**
2007 Membership Director

Jacob, Sharman, and Snyder Named 2007 PMI-OC Fellows

For the fourth consecutive year, PMI-OC named new chapter fellows at the December dinner meeting. **David "Dave" Jacob**, **Kathy Sharman** (aka Kathy Sharman-Melgar), and **Cyndi Snyder, PMP** (aka Cynthia Snyder Stackpole, PMP) were awarded our chapter's highest honor: PMI-OC Fellow. These three individuals join seven others in representing the pinnacle of voluntary service to our chapter, PMI® Global, and the project management profession. Each honoree has made significant professional contributions through volunteering and leadership.

Now retired, Dave maintains a consulting practice, Doren Associates, and teaches project management at UCI. He and his wife, Isa, live in Irvine and he has two grown sons.

Dave's attitude about project management can be summed up by his 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."

David Jacob

Adrienne Keane, **PMP**, introduced **Dave Jacob**, citing how he had held several offices on the PMI-OC Board of Directors. He was President, VP Administration, and Trustee. During Dave's service on the board, chapter membership doubled and the chapter made many technological advances. He was the first to use e-mail to send the board minutes as attachments. The first PMI-OC website was created along with the *E-mail Blast* to members. As attendance at the dinner meetings increased from an average of 25 to 100, Dave supported the effort to change the venue to accommodate the increasing numbers of attendees. The chapter also increased the number of PMP® Exam Prep Workshops.

One of Dave's biggest contributions was his untiring and enthusiastic promotion of the profession of project management and PMI-OC. Many members of PMI are former students of Dave's who were influenced by his continuous references to the *PMBOK® Guide* and PMI. He consistently published articles for *Milestones* and has been writing the *Test Your Knowledge on PMP Questions* column for many years. Because of his many contributions, he was named Volunteer of the Month and Volunteer of the Year.

Dave is a member of the PMI College of Performance Management and has written many articles on using earned value in schedule forecasting. The University of Ghent in Brussels is currently assessing his approach. Dave graduated from Drexel University with a degree in mechanical engineering and received an MSME from Stanford, where he finished all the courses toward a PhD in engineering management.

Dave has been a project engineer, project manager, and program manager. He had the privilege of working for GE on the Polaris submarine project at the time they were first implementing the PERT technique. He worked for Beckman Instruments on the Viking project the first time that NASA mandated the use of a WBS for the project.

Kathy Sharman

"**Kathy Sharman** was there at the beginning," began **Frank Reynolds**, **PMP**, **PMI-OC Fellow**, who introduced her. Kathy was working in information technology at Pacific Life, trying to start a corporate PMO by relying on her own experience and readings. She discovered PMI and drove up to a meeting in Los Angeles. When she announced her desire to start a chapter in Orange County, the board laughed and said, "Who will come? There are no aerospace firms in Orange County." Kathy was a female, six months pregnant, and not in aerospace. When she contacted the PMI Regional VP, he took one look at her and tried to talk her out of it, because it would "take too much time and energy." But Kathy pressed on, and he begrudgingly signed the charter petition.

Kathy and **Julie Wilson**, **PMP**, **PMI Fellow**, found PMI members **Frank Reynolds**, **PMP**, **PMI-OC Fellow**; **Charlie Lopinsky**, and **John Bing**, **PMI-OC Fellow**, and they started a telephone tree to find others in Orange County who were interested. They networked like crazy and looked for anyone involved in project management. At the first meeting of potential members, they had more people attending than the LA chapter did! Kathy made a major commitment to ensure that PMI-OC was non-discriminatory and open, and that all were welcome.

Kathy served as the interim president during the chartering process and as the chapter's first president in 1989. Several years later, she was a trustee. Because of her efforts and the participation of many volunteers, PMI-OC was named Chapter of the Year in its first year.

Kathy has spent her entire career combining project management and application development. She has started several PMOs, but prefers to be in the thick of the action, managing projects and resources. During 17 years at Balboa Life and Casualty, she ran numerous projects that were vital to the organization, including

2007 PMI-OC Fellows

imaging and workflow on the company's first LAN system, Y2K, and creation of a system to support the new Homeowner product line. She is now Vice President of Application Development for Carrington Mortgage Services.

Kathy lives in Costa Mesa with her husband, Fernando Melgar. She has four children, the youngest of whom is 17. While she has many other pursuits and volunteer commitments, she is encouraged and inspired by the organization and professionalism of PMI-OC volunteers who continue to take ideas and make something worthwhile out of them.

Cyndi Snyder Stackpole, PMP

Because of professional commitments, **Cyndi Snyder** was unable to attend the presentation. **Julie Wilson**, **PMP**, a former PMI-OC president and a 2006 PMI-OC Fellow, reminded members in attendance of Cyndi's accomplishments during her two terms as chapter president. PMI-OC was named Distinguished Chapter, and Cyndi was honored as Outstanding Chapter President of the Year by PMI Global. Cyndi moved the chapter to a higher level of function as it experienced significant growth. She guided the board of directors in shifting from a tactical to a strategic focus.

With Cyndi's guidance, our chapter continued a legacy of PMI Global initiatives. These included instituting the Charles Lopinsky Scholarship Fund under the institute's fiduciary structure. Also on her watch, our chapter instituted the policy of funding the attendance of many board members and volunteers at PMI leadership sessions.

Cyndi continues her legacy of service at PMI as the project manager for the *PMBOK® Guide, 4th Edition*. In this role she manages a committee of over 300 volunteers responsible for every chapter in the *PMBOK® Guide*. She has served as the mentor for Region 7 and was a member of the PMI Standards Member Advisory Group from 2004 to 2006. She was also president of the Leadership Development and Excellence Committee, which acted as a liaison between PMI components and the PMI Global Board of Directors.

In her consulting, Cyndi specializes in assessing organizations' project management maturity and helping them advance their maturity across their organizations. Cyndi earned an MBA from Pepperdine, and she has broad experience in managing health care projects. She works with clients in the public sector and private industry. In 2006, she co-authored *Introduction to IT Project Management*, and *The Advanced Project Management Memory Jogger*. She teaches multiple topics in the project management certificate program at UC Irvine and other training institutions.

Cyndi is married to Michael Stackpole and lives in Idyllwild, California. She has a 15-year-old daughter, Talaya, and a love of animals and the outdoors. Cyndi always encourages people to take on a commitment to PMI. She says, "In this type of volunteer organization, you will gain experience you may not get anywhere else. Dream big, go for it, and you will be amazed at what you can accomplish!"

Janice Preston, PMP, PMI-OC Fellow
Frank P. Reynolds, PMP, PMI-OC Fellow

PMP Exam Questions

Test your knowledge on these sample questions.

1. You are assigned as a new project manager of a project that is 40 percent complete. You are assigned due to the departure of the prior project manager. You review the current issues logs and meeting minutes. You determine that there has been insufficient communication to the stakeholders and you immediately put in place:
   a. A lessons learned knowledge base
   b. A weekly face-to-face status meeting with key stakeholders until key issues have been resolved
   c. A quality audit
   d. A formal project review

2. The cost management process that aggregates the estimated costs of individual work packages is:
   a. Cost budgeting
   b. Cost control
   c. Cost planning
   d. Cost estimating

3. You are preparing a schedule for your project. Initially you need to do some resource planning and are told that a key resource will be available only on a specific date. In preparing your schedule, you state a date this resource will join the project. You have:
   a. Identified an assumption
   b. Identified a constraint
   c. Set up a milestone to be met
   d. Set up a task on your critical path

4. Which definition defines the Executing Process Group?
   a. Integrates people and other resources to carry out the project management plan for the project
   b. Defines and authorizes the project
   c. Formalizes the acceptance of the product, service or result of the project

Submitted by: **Diane Altwies, PMP**
OuterCore, Inc., www.outercoreinc.com

Scholarship Available

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

The annual scholarship is given in memory of **Charles Lopinsky**, **PMP**, **PMI Fellow**. Charlie left behind a legacy of service to PMI. Joining PMI in 1971, he was an active volunteer with both the PMI-OC and PMI-LA chapters, as well as with the institute itself.

Competitive scholarships are based on merit, as measured by academic performance, co-curricular and extra-curricular activities.

For more information, go to the PMI Educational Foundation's website at www.pmi.org/pmief.

Application deadline for this scholarship is May 30, 2008.

Spark of Love Toy Drive

The holidays have come and gone, but that doesn't mean we can't look back at the fond memories! The December 11th dinner meeting's **Spark of Love** was a huge success.

I must recognize each and every member who remembered to bring a toy to our meeting. With our busy lives, holiday events, and hectic shopping schedules, it is absolutely wonderful that our fellow PMI-OC members took the time to purchase a gift for a little boy or girl who would otherwise go without. Our table of gifts was overflowing!

The toys were presented to **Captain Chris Caswell** and his team, representing the Santa Ana Fire Department. **Ralph Dutra** did a fantastic job of welcoming them to our dinner meeting (including a little ribbing that both embarrassed them and made them laugh). It speaks volumes about our organization that we can come together during an incredibly busy and stressful time to reach out to others and give when many have already reached their thresholds.

So this month, give yourself a pat on the back. PMI-OC members, you deserve it!

Sabina Horigan, PMP

Above: Representing the Santa Ana Fire Department: *Left to right:* **Andy Ogren, J.R. Sterling, John Belles, Captain Chris Caswell, Herb Mahaffey**

Far left: Santa Ana Fire Department **Captain Chris Caswell** thanks PMI-OC for its support.

Left: **Sabina Horigan, PMP,** Spark of Love Toy Drive Chair

PMI

2008 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 2008 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 2008 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 2007 PMI Orange County Chapter Project of the Year was awarded to Edison SmartConnect™ Advanced Metering Infrastructure (AMI).

The final 2007 PMI Project of the Year was awarded to Fluor Corporation's Fernald Closure Project.

Electronic Project Documentation

Legal and Practical Aspects

PMI Orange County's December 11th dinner meeting speaker was **James G. Zack, Jr.** The topic he explored in his talk affects each and every one of us who use electronic documents of any sort. Even this review of his presentation is an electronic document because it is produced, reproduced, transmitted for reproduction, and distributed to the large membership of PMI-OC.

Mr. Zack began by giving some background information so that we all understood what he meant when he referred to electronic documents. Electronic documents include:

- Documentation retained electronically
- Project websites
- Project extranets
- Project collaboration websites
- Project portals
- E-mail

Each of the above items gives us easier access to documents, faster communication, and available up-to-date information.

His talk then turned to its primary purpose of exploring potential problems with this medium. The problems he covered were legal, practical, and used in litigation.

For example, websites used in conjunction with projects can contain updated plans and schedules, RFPs, submittal logs, cost reports, and many other project related documents available to all who have access. These websites can be partitioned so that certain areas can have restricted access in addition to the general access.

Because everyone has access to the most current information at all times, review cycle time is reduced and communication is faster.

Mr. Zack then spoke about electronic documents from a litigation point of view. He began by discussing how a "document" is defined within the area of litigation. It can consist of the following and much more:

- Issues documents
- Damages documents
- Contract documents
- E-mails
- Databases
- Word processing files
- Spreadsheets
- Voice mail (it is stored electronically)
- Tax reports
- Source codes

This list includes **all** information created, stored, or transmitted electronically. Mr. Zack then gave us an example of one litigation case for a $300 million project in litigation that had 25 million documents. His department has more storage for such documents than the accounting department; his department has some seven terabytes of storage space.

Because electronic documents have such a broad definition, some courts have ruled that hard copy of documents is not sufficient. In addition, courts have also ruled that **all** electronic data must be produced in some legal circumstances. Mr. Zack added that method of producing evidence is becoming much more common. Some courts also allow **opposing parties** access to electronic information stored in:

- Corporate mainframes and servers
- Laptop and notebook computers
- Personal digital assistants
- Home computers of key employees

In past cases, when data was destroyed, courts have not only fined and/or jailed people responsible, but have instructed jury members to assume that negative information was contained in the destroyed documents (electronic or hard copy). What is surprising is that this is all "old hat."

Mr. Zack says these current litigation rules go back to the 1970s. There is also the issue of metadata, defined as "data about data." Metadata contains such information as to who created, modified, examined, or was a party to destruction. It is ubiquitous, cannot all be deleted, and contains date and time information about all activities.

The example given to the audience was about a simple letter which could be revised and approved before being sent with limited changes. This simple letter can get reproduced into 12 or more copies in various computers of a company before it gets sent. Of course, the metadata would keep track of who did what and when. All of this information could be requested in litigation; to be clear, all 12 copies (deleted or not) could be requested and retrieved for use by the court. This led Mr. Zack to make the assertion that electronic documents are more permanent than paper!

Mr. Zack reminded the group that every person has certain legal obligations to preserve information that may be part of litigation. Normal document destruction policies are not acceptable to courts once litigation is being considered and is known by the destroying party. This non-destruction period can start years before the actual start of litigation. Everything must be preserved, including backups that would normally be rotated and destroyed after a certain time must be stored once litigation is being considered.

A rule of thumb was clearly emphasized, "If you don't think you would like to see what you write in the *New York Times*, don't write it!" Drafts that were routinely destroyed are in the computer system somewhere and will be found by experts.

Mr. Zack delivered a lot more information on the subject. Some of his examples were downright frightening to anyone who is careless about what gets recorded or doesn't know where the information is kept.

In summary, his presentation was concise and included three main points:

- Electronic project documentation offers many potential advantages.
- Electronic project documentation has unique problems and special risks
- Special precautions must always be taken!

John Sunderson, PMP

PMP Exam Answers

1. **b. A weekly face-to-face status meeting with key stakeholders is the most appropriate answer, as you are a new project manager with a project in trouble.**

   PMBOK® Guide 2004, Chapter 10, Section 10.2.2.1

2. **a. Cost budgeting**

   PMBOK® Guide 004, Chapter 7, Section 7.0

3. **b. A constraint is a restriction placed on the project.**

   PMBOK® Guide 2004, Glossary

4. **a. Integrates people and other resources to carry out the project management plan for the project**

   PMBOK® Guide 2004, Chapter 3, page 41

At the December Meeting

1

2

3

4

5

6

1. Registration desk
2. New PMPs, left to right: **Candice Sale-Rodriguez, Michael Bremser, Sabina Horigan, Rosa Holdeman**
3. Outgoing 2007 board members, left to right: **Cornelius Fichtner, PMP**; **Nora Goto, PMP**; **Brent Felsted, PMP**; **Victoria Flanagan**; **Pan Kao, PMP**; and **Francis Almaraj, PMP**
4. December Vendor Showcase: **Gaylord Nichols** and **Julie Anderson** representing Caltech Industrial Relations Center
5. **Frank Reynolds, PMP, PMI-OC Fellow**, and his wife **Giovanna**
6. **Paula Brookshire** and **Bill Secore**

Member Spotlight

New PMI-OC member and volunteer **Lara Deutchman** is taking all the right steps in her career transition from her current industry into project management.

Lara joined PMI-OC in December to learn more about the field and to tap into her desire to organize, mediate and solve problems.

When asked why she is interested in project management as her new career, Lara said she enjoys the challenge of bringing a team together to work toward the successful completion of a project. She added, "I find it rewarding to coordinate the various components of a larger initiative while managing the finances and adhering to the timeline."

Lara is currently a volunteer for the PMI-OC Board of Directors and the Marketing Committee. Some of her current responsibilities include working on the Project of the Year. She added that she would appreciate hearing from chapter members about the special projects with which they've been involved. Prior to volunteering with PMI-OC, she was involved in all stages of fund raising events for local groups such as the Guilds for the OC Performing Arts Center and Hoag Hospital's Club 552. She also has extensive experience planning and hosting networking receptions and client appreciation events from a previous position in the hospitality industry.

Lara is a California native, growing up in Northridge and currently residing in Newport Beach. During her spare time, she plays year-round soccer in a women's league on the "Second Wind" team. On an interesting note, Lara also dances throughout the year at Greek festivals, using lessons she learned over 20 years ago and enjoys reaching out to help other people who want to learn.

Some of Lara's future goals include a successful transition into the project management field and obtaining the PMP® certification. This goal doesn't seem to be out of her reach, as Lara has already succeeded in obtaining the Series 7, Series 66, Series 31, and the California State Insurance License in a condensed period of time.

Lara looks forward to ultimately finding an opportunity that will allow her to take the lead on large-scale eco-friendly projects.

So if you're interested in learning a few Greek dance steps or just want to meet a very outgoing person, be sure to say "Hi!" to Lara at the next PMI-OC event.

Bernice Valeriano

Bernice Valeriano and **Lara Deutchman**

Photos by Simon Hawkins, PMP.

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

Advanced MS Project
Part 2 Project Reporting

On December first, **Mike Graupner**, **PMP**, and **Gene Senecal**, **PMP**, presented the second in a series of advanced topics related to Microsoft Project. This seminar was truly an advanced topic because it dealt with not only the basics of project reporting, but also the reasons and motivations for reporting. As in the first seminar on Microsoft Project, Mike and Gene demonstrated the relationship between project management and the tools needed to do the job.

The first portion of this seminar was concerned with communication theory, since that is what reporting is all about. This first part covered the "Triple Constraints of Communication" (audience, message, and content), *Perceived vs. Intended Meaning, Neuro Linguistic Programming, Thinking Pattern Preferences, Body Language*, and *Metaphors*. That was a lot of material, but it was presented well. Mike and Gene were well prepared with examples and a set of slides that made the participants think. One such example is shown below.

Review of Core Communication Concepts

Intended Meaning — A's Reality

Shared Space
Verbal Message
Non Verbal Message

Perceived Meaning — B's Reality
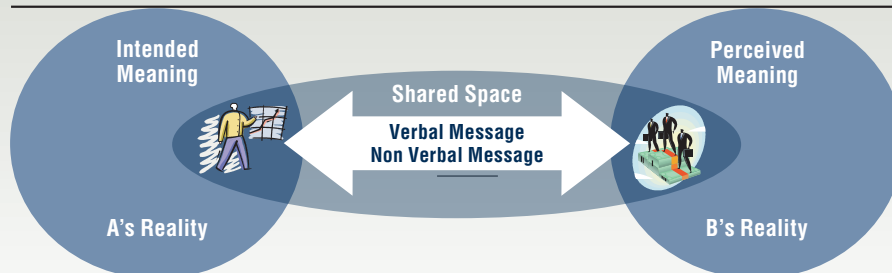
"I am a man of limited intelligence."
What does the above sentence mean?

Mike emphasized the importance of knowing your audience by using a multifaceted approach that encompasses all of the above factors. Just knowing that your intended audience is the CEO is not enough; you need to know whether that person responds to visual cues, auditory cues, or feelings before you can begin to create a report that really communicates.

Mike and Gene then reviewed various kinds of reports and discussed the pluses and minuses of what makes a really good report. There were 11 slides in this phase of the presentation alone. This was followed by the *Top Ten Reporting Mistakes and How to Avoid Them* segment of the presentation. Once again, there were generous slides and discussions to help the participants receive in-depth understanding. It is presentations like this make the Advanced Topics Seminars so valuable to those interested in project management.

The following segment covered *Earned Value Reporting* and demonstrated good and bad examples of reporting. Mike and Gene started with a brief review of earned value to insure that everyone had the same level of understanding. Earned value reporting is an excellent example of how jargon can obscure valuable information in a report. This subject was communicated with multiple slides showing various ways, both good and bad, to report earned value.

Next came exercises of various types that gave the participants hands-on experience with ways to report information from Microsoft Project.

There were three exercises:

1. Earned value using Microsoft Project
2. Working with Microsoft Project and other applications
3. Using Microsoft Access to report from Microsoft Project

Each of these exercises utilized the information from the preceding class instruction. The exercises started with simple examples and worked into complex and powerful reporting systems and tools. The third example was extremely well done, to the point of actually giving the participants some framework tools as a starting point for their own major reporting efforts.

The concise one slide summary was excellent and was followed by a question and answer period. PMI-OC extends its thanks to Mike and Gene for an excellent seminar.

John Sunderson, PMP

Photos by Louie Chanco, PMP

WANT TO BE PMP® CERTIFIED?

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

PMI Orange County Chapter Announces Its 2008 Winter Course

PMP Exam Preparation Workshop

Six Saturdays Beginning February 2, 2008

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

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

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

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

Where: **Laguna Hills** | **Costa Mesa** | **Brea**

Holiday Inn	**University of Phoenix**	**Embassy Suites**
Laguna Hills	South Coast Learning Ctr.	Brea, North Orange County
25205 La Paz Road	3150 Bristol Street	900 East Birch Street
Laguna Hills, CA 92653	Laguna Hills, CA 92653	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.

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, designed and facilitated by Dr. Jerry Brightman. The program is 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

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.

Photo at left:
The 2007 PMI-OC LI class
Photo by Benjamin Munson

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 per PDU For Members

Total PDUs: 50

Program will be limited to 25 participants.

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

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.

Special PMI-OC volunteer pricing: See www.pmi-oc.org.

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

Please help us improve our communication with you by verifying your mailing and e-mail addresses on the PMI® website.

Please go to **www.pmi.org/authent ication?s=false&r=www.pmi.org/ Pages/default.aspx** to check your membership information, mailing and e-mail addresses.

To access, you will be prompted for your PMI user name and password. If you do not know these, just continue to follow the prompts.

PMI-OC Dinner Meeting
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

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

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

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 Sunday, January 6, 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 Sunday, January 6, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast with Your SOX On
Thursday, January 10, 2008:

Doubletree Hotel, Irvine Spectrum
90 Pacifica Avenue, Irvine
Meritage Restaurant & Wine Bar
7:15 – 8:30 a.m.

Second Thursday of every month
Registration: **kevinmerr@earthlink.net**
Full breakfast buffet iis self paid.
Parking is validated.

PMI **OC**
ORANGE COUNTY CHAPTER

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