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March 11 Dinner Meeting

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Volunteer Opportunities
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Negotiation Skills

Presented Robert W. Kubacki

Over one hundred years ago, Americans were as good negotiators as you would hope to find anywhere in the world. The Yankee traders were legendary in the four corners of the world for their ability to negotiate a deal.

Our society and modern culture do not provide the opportunity to develop and use these skills; we simply have no models for them. In other cultures, negotiating is a way of life, from negotiating a midwife at birth to the cost of a funeral at death, and literally everything in between. But that is most certainly not the case in 21st century America.

This presentation will serve as an introduction to a possible seminar on negotiation skills. It will present some examples of the skills covered.

- Negotiation Fundamentals: Techniques, Tactics and Strategy
- Personality Type and Its Impact on Communication and Decision Making
- Critical Thinking: Analysis of Argument
- Advanced Techniques and Concepts: Preparing for the Unknown.

March Vendor Showcase:
MLM Project Services, Inc.
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Robert W. Kubacki is presently a senior project engineer at Mission Geoscience, Inc. of Irvine. In that capacity, he manages the generation of expert surveys and analyses in the fields of geophysics and geotechnology in anticipation of, and for, use in litigation.

The firm also has a substantial practice in environmental planning, analysis and remediation. Combining years of experience as a professional with years of experience as a teacher, Mr. Kubacki founded a consulting firm focused on a no-nonsense approach to relationship management.

Mr. Kubacki has been general counsel to a multinational manufacturer of electronic components and has held diverse management positions in the practice of law and engineering, primarily in technology and environmental management.



THE CHAIR'S COLUMN

NEW MEMBERS

Chandra Bose	Henry Robberson
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Siddhartha Biswas	Michael Starzyk
Tanya Bonelli	Randy Steuckrath
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Scott Fowler	Peter Wong
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Lori Higgins	
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Sandra Blanco
Jae Chang
Amir Chaudhry
Michael Daley
Soodi Fahimi
Suresh Krishnan
Peter Meisenzahl
David Willis



Tools... Addictions and Fit

Sometimes I wish more people and businesses went through rehab to cleanse themselves of their tool addictions and excesses. By tools, I mean gadgets, applications, processes, methodologies, resources, etc.—those business and project utensils that improve how we operate and what we know. The question rises as to the fit of a tool versus need and impact.

Gadget-wise, we see people with Bluetooth headsets glued to their ears and Blackberry devices as extensions of their fingers. While such tools can improve project communications, we also let them consume ourselves. In a recent client's program status meeting, a man sitting to my right was wearing a Bluetooth headset quietly playing a podcast and a woman sitting across from me was incessantly tapping on her Blackberry just under the table. This was distracting and rude... multi-tasking excess. I slid a note to the headset man politely asking him to turn off his headset. Although several people occasionally threw scorned stares at these offenders, no one asked them to refocus their attention to the meeting. Then I heard post-meeting grumblings from several attendees on how wasteful those meetings are. I believe you don't have a right to complain about a problem unless you are willing to be part of a solution.

On the application front, I have seen great companies try to adopt project software on such a large and detailed scale taking over two years to implement. The result is an over-engineered solution that is time-consuming to use with no improved behaviors or deliverables. No wonder project professionals hate PMOs and project methodologies. We have to ask ourselves whether we are helping or hurting.

Over-engineering a solution and not investing in the change impact are challenges we often face. In helping a client several years ago to rebuild their PMO, one of the first things I challenged was an overdue project to implement a large-scale project software solution. They liked the base software package. (Good first step. You have to like what you are using, otherwise, why use it.) So, we worked to slim it down based on what they really needed, issues they were facing, and changes they wanted for their projects. Then, I met one of their under-the-radar project teams using their own tools. What a find! In working with them, we integrated some of their tools with the new project software, processes, and templates for a great usable solution across their department. This was the key to implementing a solution with appropriate fit. Plus, that team's positive energy in sharing what worked for them helped make the implementation successful.

Out of all the project management tools that I love (project productivity checklists, templates, information resources, scheduling software, etc.), I admit that one of my favorites is still Microsoft Excel. It is readily available and known, tried and true, and has numerous uses. It can be a simple solution or you can beef it up programming macros and integrating with other tools. I have built up some Excel templates and workbooks that work effectively for me.

How about you?

What are your Coveted Tools and Addictions for Project Management?

In the spirit of knowledge sharing within our community, I want to hear from you. Your fellow project management professionals probably do too. What are your project management tools that you rely on heavily, cannot live without, think are hidden gems, or find very effective? Open up your treasure chests. Send me an e-mail at chair@pmi-oc.org with one or more of your favorites, how you use them, and what value they bring to your project and/or business. I will share key finds I collect.

Victoria Flanagan
Chair/President

In This Issue

March Dinner Meeting	1
New Members, New PMPS	2
The Chair's Column	2
PMI-OC Programs	3
Volunteer of the Month	3
Volunteer Opportunities	3
February Meeting Review	5
At the February Meeting	6
Member Spotlight	7
PMP® Exam Questions	7
Scholarship Available	7
PMI-OC Leadership Institute	9
Mr. Cap "M"	9
February ATS Review	11
Letter to the Editor	12
January MVOT Review	13
MVOT Notice	13
Coming Events	14
Upcoming Advanced Topics	14
New Dinner Meeting Venue	15
Monthly Meetings	16

PMI-OC Programs

Volunteer Opportunities

Marketing Director:
marketing@pmi-oc.org

Milestones Contributors

Write 300, 500, or 1,000 word reviews of attended chapter events for *Milestones*, the chapter newsletter. Clear and concise writing styles are required.

Milestones Photographers

Need talented and creative individuals with an eye for style to take photos of chapter events for *Milestones*. Must have a digital camera and a flash unit to take pictures at indoor and outdoor venues. Photos are sent electronically or mailed on CD to *Milestones* editors and graphic designer.

Membership Director:
membership@pmi-oc.org

Member/Volunteer Orientation Training (MVOT) Lead

Works closely with the membership director and the membership team. Responsible for publicizing, planning, and executing the MVOT meetings held every other month. Position requires coordination with membership team, BOD and other participants.

Responsibilities include booking meeting space, monitoring registration head count, assembling materials, actively communicating with participants, hosting the session and presentation of PowerPoint slides as needed.

Candidates for this visible position should enjoy meeting and engaging new and prospective members. Position provides opportunity to learn overall structure and mission of the chapter to serve members. Estimated time commitment is eight hours per session. Detailed position description is available.

Volunteer Coordinator

Work with the membership director to support ambassadors and board of directors by soliciting volunteers and identifying volunteer candidates as requested.

Present nominees to board for Volunteer of the Month and Volunteer of the Year. Present VOM at dinner meetings and write VOM articles for *Milestones*. Support MVOT sessions and assist in planning special events.

Judith Berman: bermanjh@yahoo.com
or 949-395-8990

Advanced Topic Seminar Reviewer

One individual from each ATS is needed to write an article for *Milestones* about the ATS they attended. Editorial specs for ATS reviews are: full page article at 1,000 words; photos and/or graphics may extend total submission length.

The advanced topic seminars take place the first Saturday of each month at Keller Graduate School of Management, 3880 Kilroy Airport Way, Room 227, Long Beach, CA 90806.

ATS reviewer earns free admission to the seminar. Regular cost in advance is \$45 for PMI-OC members and \$50 for non-members. ATS reviewer also earns four PDUs for each event.

On the Move and in the Groove

There is an old adage, "Many hands make light work." What a pleasure the last few months of providing leadership in the programs area have been. The team has worked cohesively and virtually together to create a collaborative vision of our 2008 programs. Positive momentum has been created as the programs team offers the following opportunities to its membership.

Through the diligent efforts of **Kristine Hayes Munson, PMP**, the 2008 PMI-OC Leadership Institute has officially kicked off its first session. Twenty select participants are enjoying their experiential journey of leadership with **Dr. Jerry Brightman**. The first two days of the seminar were this month (see page 9), and a group of complete strangers was transformed into a cohesive team of supportive learners embarking on a journey of self awareness. **Ed Nauman, PMP**, has enthusiastically agreed to assume the role of chairperson for upcoming leadership offerings.

PMP® prep classes are underway in Laguna Hills, Brea, and Costa Mesa. These classes are an excellent way to collaborate with your peers in preparing for the PMP exam. The chair, **Mike Graupner, PMP**, experienced an overwhelming response to the instructor training course offering for the PMP prep class. **Adri Estrada** and **Jim Monical, PMP**, deserve special recognition for their efforts as class project managers.

Continued on page 5

VOLUNTEER OF THE MONTH

Adri Estrada

We are proud to announce that February's Volunteer of the Month is **Adri Estrada**.

Adri was instrumental in opening the PMP® prep class in Brea. She campaigned for a workshop located in Brea to accommodate project managers who live and work in north Orange County.

Once her proposal was approved, she booked the location and coordinated the session logistics with the PMP prep team. Adri has successfully managed three workshops. Adri's initiative, dedicated effort, and positive attitude were responsible for 17 students in the September 2007 class successfully completing the session.

Adri has been a member of PMI-OC since August 2006 and works in the finance industry. She has a passion for communications and enjoys making sure that everyone has the right tools to succeed.

Adri said she enjoyed the empowerment and responsibility of making the Brea class happen and the outstanding support and encouragement she received from PMP prep team.

If awarded a million bucks as Volunteer of the Month, Adri's indulgences would include a personal trainer, a hybrid car, a gift for her parents, and a pair Christian Louboutin shoes, you know, the shoes with the red soles.

Most folks might not know about Adri's other passion. She sings classic jazz with a stand-up bass and drum trio. She says, "There is nothing more relaxing and exhilarating than to escape everything and melt into smoky liquid notes from the past."

Congrats and thanks, Adri!
Ralph Dutra



PMI-OC Membership Director **Thomas Cutting, PMP**, presents a certificate of appreciation to **Adrienne (Adri) Estrada**.



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Simplifying Complex Fast-Track Projects Using 4-D Scheduling

iving in The OC can make one a bit jaded when hearing about **Walt Disney Imagineering**. I had planned to view the presentation with a little “been there, seen that,” but this turned out to be an “E-Ticket” ride!

Frank Addeman; Vice President of Planning, Scheduling and Management Controls; brought a video clip titled, “Building a Thrill Ride: Expedition Everest,” about the migration of a ten-drawing concept to major attraction in around 18 months. The “vision” was exciting; the budget was tight; and the deadlines were killers. But the short clip did something unique; it sculpted a project in three dimensions.

Progressive elaboration took the original ten drawings to over 20,000 drawings.

Work breakdown identified the need for technologies (software, switching, animatronics) that had never been done on that scale . . . or had never been done at all.

Tasks lists coordinated the standard “build,” but the constraints of space caused different task groups to be sequenced and choreographed into a precise dance.

Risk management was not limited to just engineering and logistics . . . but to fidelity to the “vision” and the “story” of the attraction. It paired a project manager with a producer to meld schedule and budget risk with artistic risk and to manage the whole program.

Frank told a story about logistics that required:

- Up to 100 vendors to coordinate assemblies and fabrication in precise order,
- More than 5,000 tons of steel in two different structures that were only six inches apart, but which did not touch,
- Coordinated global deliveries from California, Canada and the Czech Republic to the Walt Disney World site in Orlando, Florida, and
- Deployment of a new software system that had fully half of its features developed “based on need” for this ONE project.

But the real “magic” was in seeing a **3-D communication plan**. In weekly vendor meetings, the next set of tasks was reviewed in three dimensional graphics, in the sequence in which they needed to be conducted, and color coded to identify the ownership by team. The plan was adjusted to reflect the CURRENT status of the build and was available as a reference document for the different contract teams to use as they prepared for each work segment.

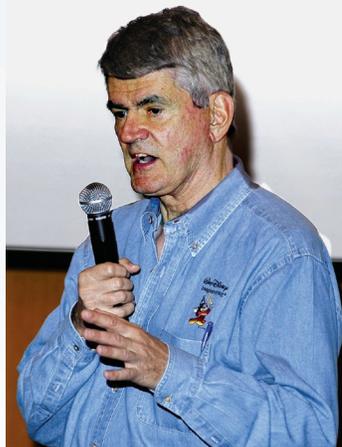
This communication plan was a “living” document that could be experienced, adapted, revised, and updated in real time, as the work progressed.

Earned value allowed the project manager to track the progress of the component elements along the critical path . . . but was not applied to all of the other tasks to conserve time and resources.

The presentation that followed held familiar Gantt diagrams and project schedules. But a multimedia, multi-dimensional project plan that could be accessed by ALL of the partners, and which could provide “pre-visualization” of the work just as it was to begin . . . well, I’ve never seen that done before.

It is really something to have someone present the “whole package” of project management, link it to the creative process, as well as to the mechanics of execution, and present it in an experiential format instead of oceans of paper. It was incredible to see what can be done with a project management framework, vision, and a little imagineering.

Barry Whitesides, PMP



Continued from page 3

Through the diligent efforts of **Derek Barraza, PMP**, and **Stephen Bach, PMP**, the newly formed dinner program speakers committee has some amazing speakers and topics lined up for the coming months.

Upcoming dinner meetings include topics such as *Selecting a Championship Team*, *Agile Methodology Panel Discussion*, and *Grabbing Authority*. Future dinner topics will also include a C-level panel discussion of the pros and cons of outsourcing and insourcing.

Alvin Joseph, PMP, and his team have established a pattern of operational excellence for the dinner meetings. This team also assisted in research for the new dinner meeting venue. (See page 15.)

Career fair planning for 2008 is underway, and **Susan Ashwell, PMP**, is heading up that initiative with the capable assistance of **Derek Barraza, PMP**, and **Melanie McCarthy**.

Advanced topic seminars are offered on the first Saturday of every month. Some exceptional topics, such as the continuation of the overwhelmingly successful MS Project sessions, are scheduled for the coming months. Kudos to **Judith Berman, PMP**, for her operational efforts and to **George Meier, PMP**, for his insightful speaker planning.

Planning for the renamed SoTec (formerly SCCTC) has begun. **Craig Wilson, PMP**, is the chapter’s contact on that front, and plans are progressing smoothly. Volunteers from PMI-OC are required to make this event a success.

With such positive momentum in the first half of the year, we expect to create a higher watermark for the last half of 2008. Items currently under discussion are one day seminars with stellar speakers to be announced later in the year. Another key initiative is to assess the feasibility of offering our programs virtually.

Our vision for 2008 is to provide succession planning and mentoring for future members of our team. Interested volunteers should contact programs@pmi.com.

As programs director, I am always open to suggestions for future sessions and offerings and welcome your input.

Renata Weir, Programs Director

At the February Meeting

- 1. **Melanie McCarthy** discusses the benefits of networking with **Monica Lin**, our guest speaker **Frank Addeman**, and **Kyle Crumly**.
- 2. Checking in
- 3. **Malissa Hamner**, **Anthony Garcia, PMP**, **Tyrone Jeffries**, and **Timothy Craig**



- 4. **Jerry Weathersby, PMP**, and **Philip Quigley, PMP**
- 5. February Vendor Showcase: **Gaylord Nichols** and **Julie Anderson** representing Caltech Industrial Relations Center



- 6. Dinner Meeting Technology Coordinator **Peter Librojo, PMP**
- 7. **Louie Chanco, PMP**, and **Linda M. Keller, PMP**
- 8. **Julie Anderson** from Caltech Industrial Relations Center discusses programs with **William Chiu**

Member Spotlight

I think project managers have wanderlust! Every time I talk to one, they tell me how they are traveling for work, or for the joy of it. **Khalida Parveen, PMP**, no exception.

Khalida was singled out of the large group of attendees at our February dinner meeting when we asked for new PMPs. She is a new PMP®, having passed the exam on December 8, 2007, and has been a member for about a year. After collecting her beautiful PMP mug, she agreed to talk to me and share some information about herself with us.

Khalida lives in Fullerton and works as a contractor for Southern California Edison. She is single and loves California! Well, most of California... let me explain. Khalida lived in Australia for ten years and has been in Southern California for the last two years. She says that sadly, California beaches cannot compare to Australian beaches. In Australia, the water is warmer, bluer, cleaner, the sand is whiter and cleaner, and the beaches themselves are bigger and less crowded. Do I need to go on? (Khalida, we love our beaches!!)

Okay, besides the beaches, she loves the people, the opportunities, and the weather that allows her to participate in lots of sports. She is learning to play golf and is going on her first ski trip to Mammoth in March. When our weather is not perfect, her passion is reading. She has traveled all over the world, having family in Pakistan (where she was born), a brother in Spain, and other siblings at points around the compass.

When I asked Khalida why she decided to get her PMP, she said that it was a requirement for her work on security projects, and that as a contractor, it was important for future opportunities in project management. But she was more expressive when she said that she enjoys the challenges of project management and was excited about learning the methodologies that comply with PMI® and PMBOK® best practices.

It was a real pleasure to get to know Khalida a little better. When you see her at the next PMI event, say "hi," and let her know how nice it is to get to know her.



New PMPs:
Carolyn Wong and Khalida Parveen

Linda M. Keller, PMP
Author and Fellow Skier/Golfer

PMP Exam Questions

Test your knowledge on these sample questions.

- _____ is a bar chart that shows a distribution of values.
 - Pareto
 - Histogram
 - Ishidawa
 - Flow chart
- Which is an output of the Scope Verification process?
 - Inspection
 - Recommended corrective action
 - Replanning
 - Deliverables
- A WBS dictionary will include detail descriptions of _____ and control accounts.
 - Sub-assemblies
 - Work packages
 - Project risks
 - Resources
- All of the following are major types of communication except for:
 - Non-verbal
 - Verbal
 - Graphic
 - Written

Answers are on page 10.

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.

Application deadline for this scholarship is May 30, 2008.

For more information, go to:
<http://www.pmi.org/pmief/scholarship/scholarship-lopinsky.asp>

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PMI-OC Leadership Institute 2008



Take the Lead!

Do you remember a time in your career when you worked with a true leader instead of just another manager? Would you like your chance to be a leader, even though you think such a transformation is impossible?

Dr. Jerry Brightman, creator of the PMI® Leadership Institute, is working his magic again on a select group of 20 Orange County PMI members fortunate enough to sign up early for his comprehensive leadership seminar. In case you missed it, please watch future *Milestones* issues for announcement of the next PMI-OC Leadership Institute.

“The skills that got us to where we are are not necessarily the skills we will need going forward.” This quote from Dr. Brighman provides a solid introduction to the world of learning for those who truly desire to lead their team/organization to the next level.

Participants in the first two days of the six day program learned that while many leaders are “born,” others are made: a notion that makes this course a worthwhile investment for all in attendance. Before the end of the first day, Dr. Brightman transformed a group of strangers into a cohesive team focused on a common goal: to help each other achieve and develop leadership learning milestones.

What is the key ingredient to success for today’s leaders? Dr. Brightman answers, “The foundation for great leadership is self-awareness. That’s good news! The bad news is that all of us are not as self-aware as we need to be in order to choose leadership. This is why this class is being offered: to provide you the information you’ll need to dig deeper to better understand yourselves and those around you.”

What should today’s leaders focus on in the workplace? Dr. Brighman says, “The leader’s new work is to create organizations that learn. When I say ‘learn,’ I mean create. So the work of the future is to create truly inspired organizations where people are inspired to come to work and do their best possible work.”

Why are you devoting so much time and effort in bringing your international leadership expertise to PMI? Dr. Brightman responds, “Project managers are the salt of the earth. They work harder than any other group of people I have ever met; they set incredible goals that they routinely meet, and they are incredible learners. Unfortunately, they are also in the position of receiving projects, the parameters of which have already been set by others, and so when there is project success, others take the credit, and when the project comes in over budget or over time, they get the blame. I want this to change. I want to transform project managers into project leaders. This is the intent and mission of this leadership institute.”

Dr. Gregory Thomas, CMC, PMP
got@agvalero.com



Mr. CAP “M”

Section 2.3

Organizational Influences on CAPM® Candidates



A series of columns by
Frank P. Reynolds, PMP

The Organizational Cultures and Styles section of the PMBOK® Guide (2.3.2, page 27) alerts project managers to the benefits of CAPM participants. Professional and social responsibility issues are absent from the PMBOK Guide, the sole source of exam questions. It’s easy to assume the “cultures” of this section include language, ethnicity, and technology. But what about the cultures within an organization? Consider three cultures struggling for recognition within any enterprise and how they might react to the changes demanded by an active set of projects.

Operations

The outcome of a project is a new capacity to produce important products or information. Project participants are often drawn from operational normalcy to work in a project setting. They’re involved in project conception, production, and implementation so they can bring the most benefit to the organization. This also requires them to change the way they work. Participants continue to perform their normal repetitive operational work, but also perform the contingent tasks that contribute to the progressive elaboration of the project’s work. This demands the cultural agility of a commuter between Zagreb and Singapore. In addition, operational responsibilities often pull them off their project work.

Maintenance and Repair

Implementing operational systems demands participation by users of the system involved in daily maintenance, upgrades, or repair. Maintenance is not repetitive operational work. Nor is it project work, where individuals depend upon the outcomes of preceding developments. Individuals from repair backgrounds are unfamiliar with work determined by precedent outcomes. Juggling maintenance and project work creates stress like that faced by a firefighter at a burning house who also works on fire prevention. Also, emergency repairs will pull them off a project.

Projects

Individuals working within a major project usually have other project assignments. Some are individual or small group projects in operations. The focus of critical expertise may result in conflict of priorities among concurrent project assignments. Task switching results in reduced overall effectiveness.

Answers to PMP Exam Questions

From page 7

1. **b. Histogram**
PMBOK® Guide 2004,
Chapter 8, Section 8.3.2.4
2. **b. Recommended corrective action**
PMBOK® Guide 2004,
Chapter 5, Section 5.5.4.2
3. **b. Work packages**
PMBOK® Guide 2004,
Chapter 5, Section 5.3.3.3
4. **c. Graphic**
Verma, pages 18-21

Submitted by
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A Long Term Approach to Implementing Organizational Change

Presented by Kristine A. Hayes Munson, PMP



One of a project manager's most challenging tasks is to facilitate organizational change. Many of us have managed projects where organizational change was a significant challenge and component. As project managers, we are all change leaders. We need to understand what is changing, why the change is being implemented, what is impacted, and the concerns of those who are impacted.

Kristine A. Hayes Munson, PMP, not only gave us plenty of tools and tips, but she did so while keeping us engaged and involved throughout the discussion. Kristine served on the PMI-OC Board of Directors for six years, including two terms as president/chair and was our 2006 Volunteer of the Year. She is a graduate of PMI's Leadership Institute Master Class and currently chairs the PMI-OC Leadership Institute committee. Her presentation drew heavily from her learnings from the Leadership Institute program.

Kristine helped bring change to a world-class technology organization. The change moved the organization toward its goal of managing projects consistently by implementing a defined methodology. The effort to implement the new methodology is never "done," but is always changing and improving. Kristine learned that organizational change often results in taking two steps forward and one step backward. Why?

Experiencing change is experiencing a loss. Kristine applied seven stages in a grief curve to help us understand the loss experienced by individuals when adapting to change. We discussed reactions and effective actions at each stage, then role-played the various scenarios. Because of time constraints, some stages were combined during our discussion.

1. Shock occurs when a mismatch between expectations and reality leads to a drop in confidence. Typical reactions are: feeling threatened, becoming immobilized, and lowered productivity. Effective actions are: showing support, providing new information consistently, building support networks, and communicating benefits clearly.

2. Denial that any change is necessary is characterized by an expression of anger, depression, withdrawal, and bargaining to return to old ways. Effective actions include helping people identify what they are holding onto, identifying areas of stability, and listening without judgment.

3. Awareness that change is necessary. **Acceptance**, or letting go, of past habits involves the expression of grief; **acknowledging** the value of the change; and the willingness to explore new possibilities. Effective actions include involving others to explore options, and employing participative decision making.

4. Experimentation with new approaches and **search for meaning**, or understanding reasons for success and failure, share typical reactions with **integration** of new skills and behaviors. Typical reactions include developing new routines and flexibility. Effective actions include the support of risk-taking, focusing efforts, raising standards, inspiring, and celebrating.

Kristine suggests that when leading an organizational change effort, determine where the members of your team are on the transition curve. Once you determine where each person fits on the curve, ask yourself how meetings might differ, what to say differently, and whether to behave or listen differently?

A change leader must also involve others in change planning. A quote from **Anthony Thigpen** illustrates this. "You never hand over the completed cake. Instead, you invite people into the kitchen to collectively bake the cake."

C. Otto Scharmer's "Theory U" is a tool to help us involve others by changing our listening styles as we move through the "U." Before we enter the "U," we employ a "downloading" listening style. This involves reconfirming old opinions and judgments. The left upper point of the "U" is at the **awareness** stage where our listening style transitions to *factual* listening (listening with an open mind, noticing disconfirming or new data), then to *empathetic* listening (listening from an open heart, seeing the world through the eyes of another), and finally, as we near **acceptance**, we exhibit *generative* listening, which allows us to see from emerging future possibilities.

Try this journaling exercise that Kristine took us through from C. Otto Scharmer. Answer these 12 questions:

1. In your current professional and personal situation, what are the key challenges and the emerging areas of possibility that your life asks you to address?
2. What questions, if explored more deeply, could help you to address your current situation better and to take the next step in your personal/professional journey?
3. When do you feel your heart opening? What do you truly love?
4. Imagine you could fast forward to the last moments of your life. Imagine yourself

Continued on page 12



Photo by Louie Chanco, PMP

February 2 ATS Review

Continued from page 11

at that moment looking back on your life's journey as a whole. What would you want to see in that moment? What would you want to be remembered for?

5. In your current situation, imagine that you could link to your highest or best future self, and then you could ask one question to which you would get a meaningful response. What question would you ask?

6. Now pause and listen to the response that your future self wants to give you. Write it down.

7. Crystallize your vision and intention. What vision do you have for yourself and your work? What are some essential elements of the future that you want to create with your work and life?

8. What would you have to let go of in order to bring your vision into reality?

9. Where in your current life do you experience the seeds and early beginnings of the future that you want to create?

10. Over the next three months, if you were to prototype a microcosm of the future in which you could explore by doing, what would it look like?

11. Who are the core partners and helpers who would enable you to bring it into reality and who could support you in your highest future intention?

12. If you committed to taking on the project of bringing your intention into reality, what practical first steps would you take over the next three to seven days?

Each of us compared our journaling experiences. Some of us focused on our professions, and others were more focused on their personal lives. Some of us transitioned from our professions to our personal lives.

We get so busy with our daily responsibilities that we often forget to think about what we want from life. Kristine not only helped us with tools for change efforts at work, but also gave us a means to identify areas where we might look for change in our own lives.

Patty Tutor, PMP

LETTER to the Editor

PDU questions submitted by
Sabina Horigan, PMP

1. What exactly is a PDU?
2. How many PDUs do I need to meet PMI's continuing certification requirements?
3. How exactly are PDUs reported?
4. How do I determine my continuing certification requirements (CCR) cycle time frame?
5. How do I earn PDUs, and how many PDUs are these activities worth?

Q1: What exactly is a PDU?

A1: You will typically earn one Professional Development Unit (PDU) for every hour spent in a planned, structured learning experience or activity. Fractions of PDUs may be reported in quarter hour increments following one full hour. When attending conferences spanning multiple days, one claim should be submitted for the whole event, although you still need to keep records of the specific sessions attended.

PDU activities completed prior to obtaining certification are not accepted toward the renewal requirements.

Q2: How many PDUs do I need to meet PMI's continuing certification requirements?

A2: PMPs must accrue a minimum of 60 Professional Development Units (PDUs) during each three year CCR cycle and comply with PMI's renewal requirements (including payment of a fee) to maintain their certification status.

Q3: How is a PDU reported?

A3: To report your PDUs, go to the online Activity Reporting Form on the PMI® website. Instructions are shown below.

- (1) Go to www.pmi.org.
- (2) On the top menu bar, click on "Career Development."
- (3) On the left-hand tab, click on "Certification & Credentials."
- (4) Click on "CCR Reporting Forms."
- (5) Click on "My Certification Records."
- (6) Enter your PMI identification number (membership number).
- (7) Enter your PMP® certification number located on your individual PMP certificate.
- (8) From here on, most of the recording process is just point and click.

Q4: How do I determine my continuing certification requirements (CCR) cycle time frame?

A4: Your first cycle begins on the date you successfully complete the certification examination and ends on December 31st of the third full calendar year following the year of your examination. For example, an examination date of July 31, 2008 results in an expiration date of December 31, 2011.

Q5: How do I earn PDUs, and how many PDUs are these activities worth?

A5: See PDU categories and limits below.

Category 1: Formal Academic Education

Generally one PDU per contract hour of project management course work (refer to the CCR Handbook on www.pmi.org for the calculation).

Category 2: Professional Activities: General

A predetermined number of PDUs may be earned by participating in specified professional activities. Options include:

- Author or co-author of articles and papers
- Speaker/teacher on a project management topic at an event, seminar, or symposium
- Writing a project management textbook or developing a project management training course

Professional Activities: Working in the Profession

A maximum of 15 PDUs per cycle may be earned by working as a practitioner of project management services.

- Practitioner of project management services for more than 1,500 project work experience hours per year. (Five PDUs per year)

Professional Activities: Self Directed Learning

Individualized learning projects involving personally conducted research or study. Learning may include informal activities, such as discussions or coaching sessions with colleagues, co-workers, clients or consultants. It may include reading/using articles, books, instructional manuals, videos, CD-ROMs, or other material resources. Qualifying self-directed learning activities must be relevant to project management, meet a specified purpose, and use knowledgeable resources. The *Self Directed Learning Activities Sheet* needs to be completed, as well as the *Activity Reporting form*. (Up to five PDUs per year)

Category 3: Courses and Events Run by PMI Registered Education Providers (R.E.P.s)

Generally one PDU per contract hour of project management related training, the R.E.P. will have the PDU credits for each certified course defined. (Includes attendance at most chapter meetings.)

Category 4: Courses and Events Run by Other Providers that are Relevant to Project Management

Generally one PDU per contract hour of project management related training. The PMP needs to keep records of the number of hours/PDUs.

Category 5: Volunteer Service to Professional or Community Organizations

Providing professional service or non-compensated project management services to non-employer or non-client customer groups (to a maximum of 20 PDUs per cycle). Examples of qualifying activities include:

- Serving as an officer or committee member of a project management organization (including PMI's standard development teams).
- Providing project management related services to a community or charitable group

Thank you for your questions, Sabina.

Marca Atencio, MBA, PMP, Asst. Editor

PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING

The January PMI-OC Member/Volunteer Orientation Training was held on the 16th of the month at the UCI Learning Center in Orange (near The Block). This meeting was particularly well attended; there were about 32 people, which, I believe, is a record. I attribute the turnout to new members joining as a New Year's goal, plus some who could not attend in November because of end of the year commitments.

The primary speaker at the event was our new Chair-Elect **Sylvan Finestone, PMP**. Sylvan explained the goals and programs of the Orange County chapter in detail and listed the benefits of membership. He also spent time describing the roles and responsibilities of the board of directors and taught the audience how to navigate the PMI® website.

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. Ralph described how new members can get involved and the benefits of volunteering: meeting new people, connecting with associates, and being part of a performing and growing organization, not to mention earning some of those nagging PDUs.

"It's all about networking," as **Melanie McCarthy**, from Resource Xperts, told the audience. One of the strengths of the Orange County chapter is the networking opportunity offered at the dinner meetings and other events. Melanie's presentation dealt with learning how to network while at these events and developing your networking skills. She described several valuable networking tools that everyone should know. Those in transition should consider attending this presentation in the future and take good notes. You never know when you will meet someone who will help you land that next job.

The meeting was concluded with a question and answer session and the opportunity for members to visit with one another, chapter directors, and the membership team.

The location for these meetings is easy to find, and directions are available on the PMI-OC website and in *Milestones*. There is always plenty of food and soft drinks available 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 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



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Thursday
March 20, 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:

Thursday, March 20, 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

Note: MVOT date may be subject to change.

Coming Events

March 11 Dinner Meeting

Robert W. Kubacki
Negotiation Skills
See pages 1 and 16.

March 13

Breakfast With Your SOX On
See page 16.

March 14 SoCal Pharma LIG

Breakfast Meeting
"Leadership in Pharma Development"
Location: B. Braun Medical Inc., Irvine
Presenter: Marty Wartenberg
See www.pharmalig.org for details.

March 20 MVOT

Member/Volunteer Orientation Training
See page 13.

April 5 Advanced Topic Seminar

Tim Hohmann, Galorath Incorporated
Software Estimation Workshop
See column at right.

April 8 Dinner Meeting

Jay Johnstone, raconteur, author, former major league baseball player
"How to Select a Championship Team"

SPECIAL NOTICE:

The April 8 dinner meeting is the first to be held at our new venue.
See page 15 for details.

April 10

Breakfast With Your SOX On

May 3 Advanced Topic Seminar

Mike Graupner and **Gene Senecal**
MS Project, Part 1
See column at right.

May 8

Breakfast With Your SOX On

May 13 Dinner Meeting

Lois Zells, Ajay Godhwani, Jack Bicer
Agile Methodology Panel Discussion

June 7 Advanced Topic Seminar

To be announced

June 10 Dinner Meeting

Thomas Cutting, PMP
Grabbing Authority

June 12

Breakfast With Your SOX On

Note: Coming events may be subject to change.

ADVANCED TOPIC SEMINAR

SATURDAY, APRIL 5, 2008



Software Estimation Workshop

Presented by **Tim Hohmann**, Galorath Incorporated

This workshop will cover the basic functions of gathering and assessing inputs, such as software size, people, process, and product, in order to develop an estimate of project budget, staffing, schedule, and risk. **Tim Hohmann** will walk you through a structured process with presentation, discussion, and extensive "hands-on" experience, showing you how to make use of the many features of SEER-SEM to increase reliability, traceability and efficiency.

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, MAY 3, 2008



Advanced MS Project

PART 1

Hands-On Training

Presented by **Mike Graupner, PMP**
and **Gene Senecal, PMP** (unpictured)

**Back by
Popular
Demand!**

Now that you have covered the basics of MS Project, **Mike Graupner** and **Gene Senecal** will walk you through the ten most common mistakes beginners make and help you build easy to maintain and useful project schedules.

- Does your project plan have a mind of its own?
- Does it take more time to manage the project plan than the project?
- Is printing your project plan more complicated than cold fusion?
- Does recalculating the plan make the schedule take off faster than a race horse?
- Do your co-workers gather around and chuckle when you start up MS Project?
- Is the undo feature your best friend?

If so, come learn from the battle hardened veterans who have made these mistakes and more. This will be a four hour session combining lecture and practical application on how to use MS Project as a tool to manage your projects, instead of making you a slave to Microsoft. This seminar is intended for those familiar with MS Project. Because of the limited time available, we will not be able to teach basic MS Project operation in this seminar.

Mike Graupner, PMP, is currently a project manager with Prescription Solutions in Costa Mesa. In 2006, Prescription Solutions completed both the required internal and external Sarbanes Oxley (SOX) audits without a single exception, for a clean 2006 audit of the internal controls. Part of Mike's duties include acting as the central interface between internal and external auditors and the IS organization.

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



Announcing PMI-OC's new Dinner Meeting Venue:
Doubletree Hotel Santa Ana/Orange County Airport
Effective April 8, 2008 onwards

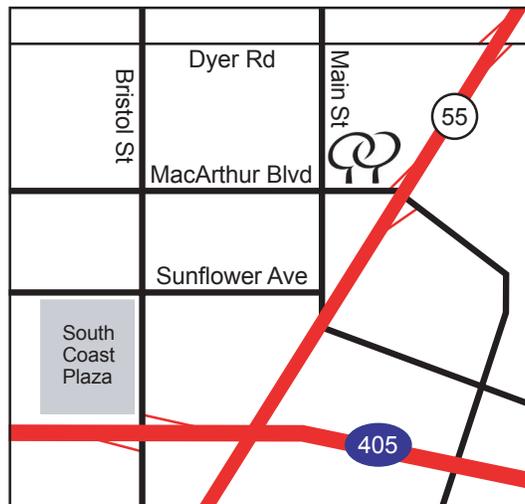


HIGHLIGHTS:

- Complimentary self parking
- Valet Parking available, \$10.00 PMI-OC rate
- Larger Ballroom
- Larger Networking area
- 1.5 Miles from Wyndham

LOCATION:

201 East MacArthur Blvd.
Santa Ana, California 92707
Phone: (714) 825-3333
Fax: (714) 825-3320
Toll Free: (800) 222-TREE



REMEMBER:

- March dinner meeting is at the WYNDHAM

FOR MORE INFORMATION:

- Dinner meetings: dinnerprogram@pmi-oc.org
- General inquiries: info@pmi-oc.org
- Hotel directions: (714) 825-3333

www.doubletreeocairport.com

**Located at MacArthur & Main,
near First American building**

PMI Orange County MILESTONES

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Editors: **Roger Lew, PMP**
John Sunderson, PMP
editor@pmi-oc.org

Advertising: **Jon Bianco, PMP**
advertising@pmi-oc.org

Design and Layout: **Jane Flynn**
jane-flynn@earthlink.net

Printing: **Sir Speedy, Long Beach, CA**

Inquiries: editor@pmi-oc.org

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Please go to www.pmi.org/authentication/?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, March 11, 2008

Program: **Negotiation Skills**
Robert W. Kubacki

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**

<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
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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, March 9, 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, March 9, or anyone who makes a reservation and does not attend, will not receive any refunds.

Breakfast with Your SOX On

Thursday, March 13, 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 is self paid.
Parking is validated.



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