



MAY 2008 • Volume 20 • Number 5

### 2008 CHAPTER BOARD

**Victoria Flanagan**  
Chair/President  
949-888-2839  
chair@pmi-oc.org

**Sylvan Finestone, PMP**  
Chair-Elect  
714-612-1550  
chairelect@pmi-oc.org

**Kim Fields, PMP**  
Director at Large  
562-712-8255  
atlarge@pmi-oc.org

**Lora Lockwood, PMP**  
Finance Director/Treasurer  
562-426-2919  
finance@pmi-oc.org

**Tariq Shaikh, PMP**  
IT Director  
949-302-4494  
it@pmi-oc.org

**Linda M. Keller, PMP**  
Marketing Director  
714-389-0052  
marketing@pmi-oc.org

**Thomas Cutting, PMP**  
Membership Director  
714-262-2303  
membership@pmi-oc.org

**Nora Goto, PMP**  
Operations Director/Secretary  
714-322-3299  
operations@pmi-oc.org

**Renata Weir**  
Programs Director  
programs@pmi-oc.org

**Volunteer Opportunities**  
Volunteer@pmi-oc.org

**Advertising Opportunities**  
Advertising@pmi-oc.org

## May 13 Dinner Meeting

# AGILE METHODOLOGY PANEL DISCUSSION

**A**s agile methods continue to make inroads beyond the early adapters, more and more organizations have become interested in discovering the best practices that work. They are also interested in knowing what pitfalls to avoid. Come hear three agile methodology experts participate in a panel discussion that should be stimulating as well as enlightening.



### Lois Zells

is an international author, lecturer, and business consultant in product engineering, specializing in project management and product development methodologies and techniques.

Lois has authored the best seller, *Managing Software Projects*, and contributed to *Total Quality Management for Software* and *The Program and Project Management Handbook*.

Lois' most popular courses are "Successful Project Management," "Managing Emerging Technology Projects," and "Effective Strategic Systems Planning."



### Ajay Godhwani

is Tallan's director of development for the West Coast. Tallan, a nationwide professional services firm, develops advanced, business-critical IT software solutions.

Ajay is a specialist in the disciplines and skills of technical project management, with a focus on the Scrum methodology.

In addition to his current role, Ajay oversees Tallan's offshore development and testing projects. Ajay also leads a workshop for project teams on the practical application of the Scrum methodology for on-time delivery.



### Jack Bicer

is CEO and CTO of Septium Corporation, a hybrid off-shore custom web software development company, combining offshore cost savings with U.S. management expertise.

Prior to Septium, Jack held several CTO roles in Internet companies and implemented the sale of 1GlobalPlace to VeriSign.

A 28 year software industry veteran, Jack is an industry expert in SaaS/web software, web software, new product development, offshoring, technology strategy, and management.

Panel Moderator:  
**Derek Barraza, PMP**

**NOTICE:** We are returning to the Wyndham starting with the May meeting. **Self-parking is now free!** When entering the self-parking garage, let the attendant know that you are coming to the PMI-OC meeting.

May Vendor Showcase:  
**Embry-Riddle  
Aeronautical University**  
www.erau.edu  
See ad on page 4.

# THE CHAIR'S COLUMN

## NEW MEMBERS

Teresa Ashley	M. R. Ravipati
Jeff Bennett	Richard Rodriguez
Diane Bogle	Gregory Savage
Victor Bonacci	Uttama Sharma
Lisa Brown-Conte	Michael Shea
Glenn Coles	Amanda Staloch
Sid Conner	Lane Tateyama
Babatunde Deru	James Thomas
Larry Duford	Heather Tomley
Suki El-Ali	Daniel Vicario
David Fauls	Miguel Villasin
Trish Fettig	Cathy Wang

Fred Figueroa  
Peter Gettinger  
Ruyue Gong  
Tim Haider  
Alberto Hernandez  
Akili Jones  
Joon Jung  
Bernard Kilcoyne  
Arthur Laski  
Audry McGillicuddy  
Laurie Moore  
Elsie Mustaller  
Mark Nebeker  
Argelio Olivera  
Barry Patton  
Tanja Peterson

## NEW PMPS

Kenneth Baker  
Kent Bingham  
Pongsakdi Cady  
Pat Castro  
Gloria Chen  
John Garabedian  
Ken Lask  
Wendy Nodari  
George Stephens  
Randy Steuckrath  
Bob Stuart



## Changes and Opportunities

If you have been following the Chair column this year and read about our 2008 PMI-OC Plan (December 2007 issue), you may recall that the chapter is making changes to leverage new technologies, improve operational activities, and increase cost-effectiveness to deliver more membership value.

One key resulting change is the Board decided to deliver our *Milestones* newsletter in digital format only and discontinue mailing hardcopies after the July issue. Over the years, *Milestones* has evolved into a key communication vehicle and high-quality newsletter which chapters worldwide reference as a best practice. So, we weighed this decision carefully, considering a number of factors and opportunities.

To start, more businesses are shifting to digital only format for newsletters, magazines, etc. Coupled with this is the fact that there is increased member interest in the *Milestones* digital format, especially from members who travel extensively, prefer to work paperless, and are more eco-conscious. Another driver is the significant rise of printing and mailing costs, which already exceed \$2 per copy per month and *Milestones* postage increased over 50% in the last year alone. While PMI-OC is financially solvent, we need to ensure we invest chapter funds wisely. From an opportunity perspective, we are building a new web site enabling us to leverage its newer technology to further evolve *Milestones* and deliver more benefits.

What this means to you:

- July 2008 issue will be the last members receive via postal mail.
- *Milestones* quality will not change, only the primary delivery medium.
- *Milestones* will remain accessible and printable in color by you at [www.pmi-oc.org](http://www.pmi-oc.org).

Benefits include:

- Provides timely delivery of information digitally without dependence on the post office.
- Frees over \$15,000 this year (\$40,000 next year) to invest in other member services.
- Allows us to increase the *Milestones*' content and distribution without additional costs.
- Enables us to add more functionality, such as direct links, in the future.
- Helps reduce the carbon footprint on our community.

The Marketing area is in the process of implementing this Board decision over the next several months. Another key change mentioned earlier is the release of our new web site scheduled for the end of May. Look for more information on these initiatives in our e-mail blasts and in the next *Milestones*.

The success of such initiatives is due to the dedication of our chapter volunteers. With so many active volunteers, it is difficult to thank each person sufficiently. At our April dinner meeting, we recognized our 2007 Volunteer of the Year (Roger Lew, PMP) and top performers (Alvin Joseph, PMP; Stephen June, PMP; Joe Paradiso, PMP; Cindy Pham, PMP; and John Sunderson, PMP). Refer to the "Volunteer Recognition 2007" article for details. Congratulations to these and all of our volunteers!

### Dinner Meetings Return to Wyndham Hotel as of May 13

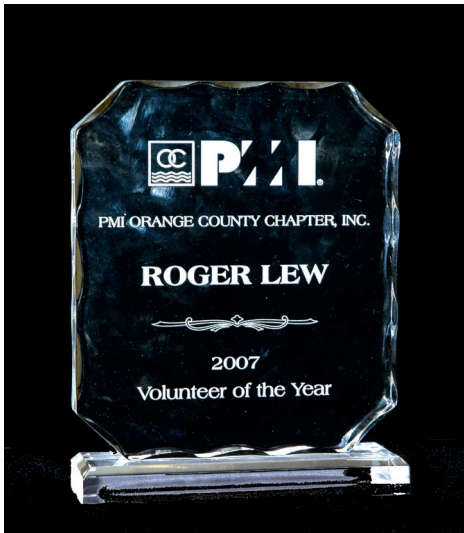
Unfortunately, our April dinner meeting attendees experienced significant parking challenges at the Doubletree Hotel OC Airport. Even though the larger meeting space and food received positive reviews, the Board considered the parking situation unacceptable and acted immediately to resolve. The Doubletree released PMI-OC from our contract because they could not meet their parking commitments as originally agreed. We decided to return to the Wyndham given our existing strong relationship and their ability to accommodate us so quickly. I want to recognize the diligent efforts of Alvin Joseph, Julie Wilson, and Renata Weir in resolving this issue in such a short period of time and negotiating the resolution with very minimal financial impact to the chapter. As a thank you for the inconvenience, PMI-OC decided to absorb the parking costs. FREE parking for attendees!

**Victoria Flanagan**  
Chair/President

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## Volunteer of the Year 2007



Roger Lew, PMP (right) with Milestones Co-Editor John Sunderson, PMP and Marketing Director Linda M. Keller, PMP

## Roger Lew, PMP

Roger Lew was named **Volunteer of the Year for 2007**. Roger's volunteer adventure began in early 2006 as a member of the Marketing and *Milestones* Teams, and he was honored as Volunteer of the Month in February 2007.

As a member of the Marketing Team, Roger has served as editor of *Milestones* for the past two years. He has organized and assembled a "crackerjack" team and made *Milestones* the "best in show" as a local professional publication.

As a second tier manager for the Marketing Team, Roger attended the Board of Directors strategic planning session at the start of this year. He was a major contributor to the presentation on reducing costs for *Milestones* and the option of making it an online publication.

Roger has been the guy responsible for the planning and production of *Milestones*. The quality and content of *Milestones* is the direct result of the team he has led.

Ralph Dutra

## VOLUNTEER OF THE MONTH

### Lori Shapiro, PMP

At her first dinner meeting, **Lori Shapiro** met Mr. Membership, **Sylvan Finestone, PMP**. Sylvan told her about the wonderful volunteer opportunities available within the PMI-OC organization.

At the time, Lori was on the boards of other organizations. Sylvan saw a volunteer in the making. Lori's priority was to gain her PMP® certification before she could volunteer. Our PMP prep classes were just the ticket. She earned her PMP in 2007.

Lori led the ambassador training meeting team, resulting in a revitalized program. Since then, she has been responsible for communicating and assigning ambassadors to events. Lori has complemented her ambassador lead role with her ongoing contribution to planning, prep and presentation of the MVOT sessions.

Lori works in the IT industry for a value added reseller and solutions integrator. She works on many different projects as a senior project manager in the professional services organization. Her responsibilities have provided a variety of different projects that allow her to keep up with the latest and greatest technologies.

For Lori, the benefits of volunteering include meeting outstanding people, which makes coming to PMI-OC events that much more fun! Making new friends and professional contacts is another benefit.

Lori is also a certified scuba diver. She has participated in a research project that studied killer whales in Puget Sound. She also loves to sail. I wonder if she ever had a crush on Jacques Cousteau.

Congratulations to Lori Shapiro, the "connect the dots" lady.

Ralph Dutra

## Volunteer Opportunities

**Marketing Director:**  
[marketing@pmi-oc.org](mailto:marketing@pmi-oc.org)

### Milestones Contributors

Write 300, 500, or 1,000 word reviews of attended chapter events for *Milestones*. Clear, 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 for both indoor and outdoor venues. Photos are sent electronically or mailed on CD to *Milestones* editors and graphic designer.

**Membership Director:**  
[membership@pmi-oc.org](mailto:membership@pmi-oc.org)

### Volunteer Coordinator

This could be a shared position. 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.

**Programs Director:**  
[programs@pmi-oc.org](mailto:programs@pmi-oc.org)

### Advanced Topic Seminar Reviewer

One individual from each ATS is needed to write a *Milestones* article 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 are on the first Saturday of each month. ATS reviewers earn free admission to the seminar and four PDUs for each event.

### Venue Coordinator

This is an ongoing position with responsibility for reserving venues and arranging food service for PMI-OC programs. Potential venues are already identified. The venue coordinator will make contacts, confirm space and date requirements, obtain contracts, arrange catering and parking, and report to stakeholders. One to two hours per month.

**Operations Director:**  
[operations@pmi-oc.org](mailto:operations@pmi-oc.org)

### Operations Deputy

Supports the operations director in preparing for board meetings (agenda, minutes, auditing, updating, and e-storage of documents) and should be available to attend board meetings. Four to ten hours per month. Word processing and excellent writing and communication skills are necessary.



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# Volunteer Recognition 2007

**T**his year the PMI-OC Board of Directors recognized one chapter volunteer as Volunteer of the Year (see page 3), as well as five outstanding individuals as our top-performing volunteers. To all our other dedicated volunteers, we offer our sincere thanks and appreciation for your contributions in 2007.

Each of our worthy recipients made significant, consistent, and noteworthy contributions to the chapter during 2007. They represent the diversity of volunteerism and the quality of our “can do” core of volunteers.

## Top-Performing Volunteers

### Finance: Stephen June, PMP

Stephen worked with the IT team to develop the PMI-OC website and online registration. In addition, he supported other activities, such as dinner meeting registration, the Affiniscape roll-out, and the merchant service integration.

Stephen says volunteering has enabled him to become more skillful in working with people. He has enjoyed performing different volunteer jobs over the years, including finance director, IT director, ambassador and PMP® prep instructor, to name a few.

Stephen is a member of the Santee Sioux tribe. Stephen's grandfather was a full-blood Sioux.

### IT: Cindy Pham, PMP

Cindy has played an active role in the PMI-OC website replacement project. She contributed to the identification and documentation of critical issues with our existing website and evaluated software and solutions from several vendors for the new website.

She continues to actively participate in the development, implementation, and customization of the new website, scheduled for launch during the second quarter.

Cindy said that she has enjoyed working with the IT team and is thankful for the chapter's many volunteering opportunities, even for busy people like her.

### Marketing: John Sunderson, PMP

John currently serves as *Milestones* co-editor. He has proven to be a valuable addition to the marketing and *Milestones* teams. John helped improve the production processes for *Milestones* and was a key team player at the PMI-OC strategic offsite planning meeting in the fall of 2007, where he shared his ideas for the marketing team.

Previously, John was the chapter's volunteer coordinator and supported the Member/Volunteer Orientation Training (MVOT) sessions. He has also served as recorder at the dinner meetings, and has contributed advanced topic seminar reviews.

### Membership: Joe Paradiso, PMP

Joe has been an active volunteer on the membership team. Working closely with the membership director, Joe has been the lead for the chapter's membership recruiting and retention efforts.

You may also recognize Joe as the lead for our very important MVOT sessions. After participating in a supporting role for a number of sessions, Joe filled the position as MVOT lead. In that role, he has been largely responsible for the continuing improvement, quality, and success of the sessions.

### Programs: Alvin Joseph, PMP

Alvin has served as the lead for our dinner meeting team. This is not a role for the faint of heart. Alvin has taken the task and run with it. To most, his role might not be visible. However, if it were not for Alvin, your dinner meetings would not be well-organized and professional events.

Alvin said he volunteered to meet people and to network. His role has allowed him to participate in activities, such as event management and venue selection, that he does not normally perform in his “real” job.

Alvin was born and raised in Africa, attended engineering school in India, and earned an MBA in the U.S.



Left to right: Joe Paradiso, Alvin Joseph, John Sunderson, Stephen June, and Cindy Pham

**Ralph Dutra**

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\*with Clinton Keith

#### Boulder

May 12-13

Certified Scrum Product Owner\*

\*with Ken Schwaber

#### Washington, DC

June 3-4

Certified ScrumMaster

June 5

Agile Estimating and Planning

#### La Jolla

July 29-30

Certified ScrumMaster

July 31

Agile Estimating and Planning

#### San Jose

October 13

Effective User Stories

October 14-15

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October 16

Agile Estimating and Planning

# How to Select a

# CHAMPIONSHIP

April 8  
Dinner Meeting Review

## Team

Little to no selection went into forming the high school championship teams for which **Jay Johnstone** played. There weren't enough boys in his school for any of them to not be on the teams. They did the best with what they had. The best they could, together. It worked. They made it work.

Jay is the local boy from West Covina who made good. He is a U.S. sports hero, philanthropist, speaker, actor, writer, and entertainer. He volunteers for 400 non-profits, setting up sports memorabilia for silent auctions. He brought some of these items to the PMI-OC meeting to sell, with the proceeds going to the Boys and Girls Club. The list of his accomplishments is long and varied. The list does not tell the story; Jay does.

### The Stories:

- Why he wanted to play football instead of baseball
- How he still ended up in baseball despite many offers in football
- Why he joined the Marine Corps
- Locking Tommy Lasorda in his room to make him miss breakfast
- Cutting up a player's underwear
- Drinking apple juice from a urine sample cup to shock the team nurse

I am no baseball fan. I won't even play softball. I could induce nose bleeds to avoid playing softball in high school and the agony of being the last picked for a team. I was a nerd. Still, I loved this talk and really got into the stories about the teams and players, excited about the wins and losses. Jay used vivid imagery of the play on the field, exchanges with umpires, road trips on buses, the personal lows, and team highs.

Topics covered during the evening included teamwork, making the best with what resources you have, learning from whatever situation you are in (the Marine Corps taught him to survive), self motivation, team motivation, breaking up cliques (they are counterproductive to teamwork), the link between team and self, how to deal with the slump times, low productivity, poor performance, the importance of persistence, practice, commitment, sacrifice, getting people engaged in their work by eliciting strong emotion of any sort, and more.

The experiences that Jay recounted were about sports. I was able to relate the emotions and performance challenges to my own workplace. I think it would be hard to pull some of the stunts he did on my colleagues at work and still have a job the next day. However, it has inspired me to think about what I can do to get similar increased enthusiasm and performance in my team members and in myself. I will have to do it my own way, as Jay found his way. I hope everyone else at the meeting left as inspired as I did. His final advice: "Become really good at what you are good at. Don't try to be good at everything. Be excellent at what you do, and you will be happy. If you are happy, it is no longer work."

### Question and Answer Session:

**Q:** How do you build team chemistry when it is lacking?

**A:** You must lead by example. You do the very best that YOU can. Don't dwell on the past. Concentrate on today and today's goals. Be successful. Make someone happy. Use the mirror test; look in the mirror and see what you have done and what others will see.

**Q:** How did Tommy Lasorda motivate players?

**A:** By lying. This got each player believing in himself. When self-doubt creeps in, you can't do it.



**Q:** Did you use visualization and other current techniques in your training?

**A:** No. My teammates and I did not do training as we understand it today. Visualization wasn't used. Weight training was not allowed. Each had to figure out what to do on his own, without a trainer walking him through it. Each player had to work it out for himself. This also caused the players to pull together. They had no money. They had to do things together to survive. Now players go everywhere by themselves,

arrive at events in separate limousines. What I learned from the old system is that you have to figure out what works for you. It won't necessarily be what works for others.

**Q:** How much emphasis was there on team and individual statistics?

**A:** What is needed to win is individual effort with your teammates. Don't think about your own stats when you play. Think about the strategy needed for you and the team to win. Now, agents want to emphasize individual stats. Your stats are not important to your teammates. What is important is for the team to win.

**Q:** How do you deal with those putting pressure on you, such as writers and umpires?

**A:** You must set goals and a tempo for yourself. You control your destiny. Be upfront and honest and nice about your need for your own time. They will respect this. Don't be a jerk and alienate others, including your teammates. You control it. Be nice.

**Q:** What is your work ethic, your attitude for practice?

**A:** I practiced like I didn't have just one game each day, but as if I had two games every day. I practiced as if every day I would play a double-header.

**Annamarie R. Wheeler, PhD, PMP**

# Member Spotlight

This month we would like to introduce **Joshua Yoon**, first-time attendee at the PMI-OC April dinner meeting. Joshua is a California native who grew up in the Bay Area, but, interestingly, also lived in Taiwan for seven years. After moving back to California, he attended UCI and majored in math.

Joshua is not only new to PMI-OC, but is also new to the project management field, having worked in it for just a little over a month! When asked why he attended the April meeting, he replied that his employer, Metafuse Inc., recommended he attend and become more familiar with the Orange County chapter.

Joshua intends to learn how project management comes into play in a company's everyday operations, particularly in the area of sales. With plans of growing with his company and gaining more experience in the sales world, Joshua's long-term goal is to transition into the financial investment world.

According to Joshua, working in the project management field has helped him understand the complexity of large projects and how work breakdown structures divide them into several manageable activities. Joshua said that this concept has changed his way of thinking about goal setting, task completion, and resource management.

When asked what he hopes to gain from being a member of PMI-OC, Joshua said he looks forward to networking, meeting others in the project management field, and gaining insight into other members' best practices and lessons learned.

So, at our next PMI-OC meeting, remember to stop by and say, "Hello," to Joshua!

**Bernice Valeriano**



**Bernice Valeriano and Joshua Yoon**

## At the April Meeting



**1. PMI-OC Fellow Janice Preston, PMP; Sylvan Finestone, PMP; and Adrienne Keane, PMP**

**2. PMP-OC Fellow Julie Wilson, PMP and Rodger Clawson, PMP**

**3. Bernadette LaPorte; Donald Barr, PMP; and Lynn Drury, PMP**

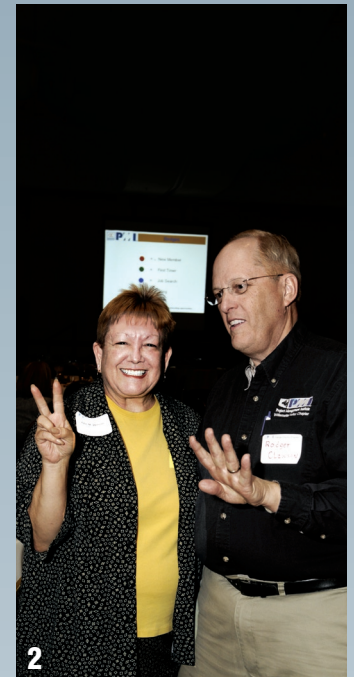
**4. Kristine Hayes Munson, PMP and Shirley Goodwin, PMP**

**5. Josephine De Los Reyes and Francis Cheung, PMP**

Photos on pages 3, 5, 7, and 8 by Steve Goto, PMP



**5**



**Bob Lambert** from Deltek, April vendor showcase



# Software Estimation, Management, and Control

This month's advanced topic seminar, "Software Estimation, Management, and Control," was presented by **Dan Galorath**, of Galorath Incorporated. Although tired from travel, Dan was enthusiastic and gave us a fantastic presentation.

First, Dan reviewed basic definitions and terminology. According to the *Free On-line Dictionary of Computing*, software "includes both source code written by humans and executable machine code produced by assemblers or compilers . . ."

He then proceeded to explain how accurate estimates are imperative for project success. An "estimate" is the most knowledgeable statement you can make at a particular point in time regarding cost, effort, schedule, staffing, risk, and reliability. Poor estimates and inadequate plans are the root causes of program risk. Dan noted that the most important business decisions about a software project are made at the time of minimum knowledge and maximum uncertainty. So a reputable process and reliable checkpoints are critical in project planning.

After discussing estimating and risks incurred as a result of poor estimates, Dan covered parametric modeling using SEER software analysis tools.

Dan then steered the presentation toward the "Ten Step Software Estimation Process." This process is applicable to both quick and detailed estimates.

### Step 1: Establish Estimate Scope and Purpose

In this step, the project manager must define and document estimate expectations, scope, and purpose. This becomes a living document which helps reduce misunderstandings and contradictory assumptions. As new information becomes available, it should be documented and factored in to maintain the project's integrity. Estimate scope is important because it allows the project manager to know what needs to be done before anyone needs to do it.

### Step 2: Establish Technical Baseline, Ground Rules, and Assumptions

What is a ground rule? It is a given requirement of the estimate. What is an assumption? Any factor related to the scope, whether it is known or not.

Documenting assumptions will assist the project manager later in understanding the basis of the estimate. The PM must not forget to include software functionality in his/her estimate. If this detailed functionality isn't known, the PM must document what is and is not included in the estimate.

In the early stages of a project, assumptions and ground rules are preliminary and full of uncertainty. They must be documented, as they'll be reviewed and redefined as the estimate moves forward.

### Step 3: Collect Data

There are several key considerations to remember when collecting data for software development.

1. Provide clear definitions and recognize that some providers may not read them.
2. Identify which data are required, highly desirable, or desirable.
3. Confirm data with in-person interviews.
4. Grade the data to indicate confidence in its accuracy.

### Step 4: Software Sizing

Size is the most important metric because better size estimates equal better cost estimates. The size projection process includes:



The Galorath family: **Ton Dekkers, Dan Galorath, Chris Hutchings, and Tim Hohmann**



1. Defining a baseline of size metric
2. Defining a set of sizing objectives
3. Outlining plan data and resource requirements
4. Identifying and evaluating software requirements
5. Using varied techniques and independent sources
6. Tracking estimates against performance

### Step 5: Prepare Baseline Estimate

To create the baseline estimate, it is critical that skilled and experienced people use proper technology and tools. Using your chosen methodology, do a first run to create the estimate. Never report preliminary results. Instead, do a sanity check for completeness. Then review with "fresh eyes" (whether a colleague's or your own after a night's rest).

Don't forget to update and refine estimates as more specific information becomes available down the road.

### Step 6: Quantify Risks and Risk Analysis

Approximate the odds that a particular risk will occur, what the cost of that occurrence would be, and determine how the risk can be mitigated. This statistical risk analysis should be a part of your schedule and work estimation process.

Continued on page 10

### Step 7: Estimate Validation and Review

Have a third party review the estimate. Part of this review includes validating estimate assumptions are realistic and ensuring that ground rules are consistently applied. Dan stated that failing to verify the estimate can result in additional project costs, or even a failed project.

### Step 8: Generate a Project Plan

Dan demonstrated using his SEER-SEM project estimate (where he input product WBS). He was then able to import the WBS into MS Project to create a project plan, saving himself hours of work.

### Step 9: Document Estimate and Lessons Learned

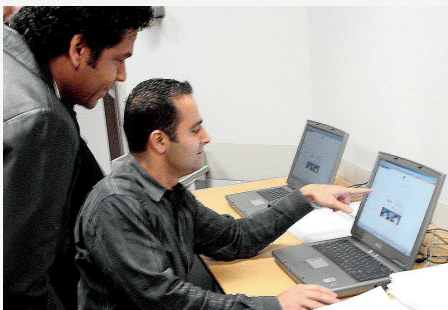
This step should occur when the final estimate is complete and also when the project closes. The project manager needs to document missing information, risks, issues, and problems that arose and how the process addressed them. The most effective lessons learned sessions are held as soon as possible after project completion, while the project team members' memories are still fresh.

### Step 10: Track Project Throughout Development

Throughout the project, the project manager should continue to refine estimates. These estimates are the basis for performance measurement and project control; monitoring the actual results ensures the project under control.

At the end of the seminar, the team at Galorath Incorporated allowed attendees to test out their SEER software on workstations they provided. This was a valuable and informative session for project managers interested in better managing risks and estimates on software development projects.

Sabina Horigan, PMP



ATS photos by Louie Chanco, PMP

# LETTERS to the Editor

**From a Reader:** I want to implement a new project management system in my company. How can I ease everyone into this transition?

**Editor:** Change of this magnitude will have many positive long-term effects, but can be a real challenge to implement. Managers typically develop their own project management methodologies and become comfortable with them. Often, methodologies differ in type and complexity from one business unit to the next and are not compatible with each other. The real benefit of an enterprise project management system is that one uniform system will increase efficiency and productivity by enabling the units to work together and to communicate more effectively. The obstacle is the usually high level of resistance to changing familiar ways and a refusal to comply with the new system. The key to any successful project management system change is the support and mandate of upper level management. This support must be unwavering and ongoing throughout the planning and implementation phases of the process.

When existing tools and techniques conflict with the new system, managers are reluctant to take time away from their daily tasks to make this change. Some ways to overcome this challenge are to seek the input of these managers from the beginning and to begin the implementation at the start of their project planning cycles, not in the middle of them. While managers may see the value of enterprise project management as marginal at best, it helps to measure benefits and communicate them to the managers throughout the process.

Examples of measurable benefits include the ability to consolidate project plans (and stop wasting time working on them separately) and a decrease in the time it takes to resolve open issues. Web-based collaborative project management results in documentable reduction in time and cost. For example, cost reduction can be measured by time spent on different project phases and money spent on items such as courier and paper costs. Raising awareness of these increased efficiencies will help sell the plan to current managers. A good planning and training program for all employees will help as well.

Critical success factors to any project management implementation are (1) the appropriate selection of technologies, tools, and techniques to support the analysis, design, development, implementation, and maintenance of the tool; (2) senior management support and commitment to the tool; (3) extensive training focused on task completion; and (4) the organization's willingness and ability to work in a web-based project management environment. This last includes adapting the organization's people, technology, work environment, culture, systems, and processes.

Implementing a web-based project management system is not a comprehensive solution to issues associated with the project management process. It does not ensure adequate employee or client input; it will not automatically resolve issues such as ownership of resources, nor will it guarantee management support. Any change of this magnitude requires a cultural change in the organization and is associated with many difficulties.

It requires extensive planning, management backing, availability of resources, and accurate monitoring of performance. In other words, it requires all of the ingredients for completing a project on time, within budget, according to specifications, and meeting customer expectations. (*Challenges to Implementing a Web-based Project Management System*, George Sifri, November, 2002).

Vinita Jha

Assistant Milestones Editor

### To our readers:

*This column is not only for questions and answers. It is also available to members, persons interested in project management, and persons associated with our chapter. It is meant to be a forum for feedback on chapter activities, plans, and possible improvements. We invite all readers who would like to express an opinion to write Milestones at editor@pmi-oc.org. The editors will select correspondence that tastefully expresses opinion, responds to previous Milestones content, or (as above) inquires about subjects relevant to PMI®. The editors reserve the right to choose what appears in the column, but we will attempt to print any letters received within the limitations of space available and editorial guidelines for Milestones.*

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Linda M. Keller, PMP  
Marketing Director

## PMP Exam Questions

Test your knowledge on these sample questions.

1. Your project is nearing completion, and you have scheduled a deliverable review meeting with your customer for next week as part of a scope verification process. Scope verification includes:
  - a. Obtaining the stakeholders’ formal acceptance of the projects deliverables
  - b. Organizing and defining the total scope of the project
  - c. The project deliverables
  - d. Assuring that all requested changes and recommended corrective actions are complete
2. The three major project documents are:
  - a. Project Charter  
Project Management Plan  
Project Communication Plan
  - b. Contracts  
Project Management Plan  
Project Schedule
  - c. Project Charter  
Project Schedule  
Project Risk Register
  - d. Project Management Plan  
Project Charter  
Project Scope Document
3. The technique that can improve duration estimates by considering the amount of risk in the original estimate is called:
  - a. Reserve analysis
  - b. Three-point estimates
  - c. Rolling-wave planning
  - d. Decomposition
4. All of the following are tools and techniques of Activity Duration Estimating except:
  - a. Resource leveling
  - b. Parametric estimating
  - c. Reserve analysis
  - d. Three-point estimating

Answers are on page 15

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# PMI Hosts Tri-Chapter Seminar

## LOCAL GOVERNMENT GETS INVOLVED

PMI-OC, along with the Los Angeles and Inland Empire chapters hosted the “**Greater LA Project Management and Leadership Seminar**” at the Cerritos Sheraton last month.

The purpose of this event was to raise awareness of the major challenges facing organizations and to explore how industry experts are working to find and adapt solutions to specific business needs. The seminar was well attended by PMI® members and also drew a large non-member government audience, which made up 62 percent of the attendees. Sponsors included Adobe Systems, Novanis, and Value Based Project Management (VBPM). The seminar was coordinated by InterACT, a local small business focusing on business outreach to local government and educators.

**Jon Fullinwider**, CIO of Los Angeles County, which employs over 100,000 people, delivered the opening remarks. He focused on key challenges facing the county, such as executive involvement and sponsorship on IT projects, as well as upward communication on project status and issues. He stressed that projects are more about people and less about tools

Retired Navy Captain **Marv Serhan** delivered an energizing keynote presentation, and continued to drive home the critical components of project success: people, communication, and leadership. He shared college football team experiences, as well as stories from his Navy career, where success or failure often resulted in life or death outcomes for fellow officers and civilians. His common theme that came to life with each story was the project team commitment and the commander’s “lead by example” leadership style that drives teams to be successful.

The morning sessions kicked off with a dynamic presentation on “Policies and Procedures” by **Raymond Urgo** of Urgo and Associates. **Mike Beard**, PMP, of VBPM, presented key success criteria focused on “How to be a Project Sponsor.” The development of this presentation was inspired by Mike’s observations in his own consulting practice of the lack of project sponsorship training and the importance of this role in the organization.



The “Ask the Experts” panel focused on PMOs within organizations. The discussion included identifying how the challenges were different depending on the maturity of the PMO.

Another discussion topic was how the experts perceived whether or not a successful project manager would be a good candidate to lead a PMO initiative. Questions were initiated by both the facilitator and by a fairly in-depth audience question and answer session.

Mike Beard (VBPM) finished off the afternoon sessions with a best practice presentation on “Portfolio Management.” He highlighted that this technique of managing projects appeals to organizations interested in formalizing their approach to receiving and approving project requests.

For more information on the seminar, including a photo slideshow, visit [www.regonline.com/LA\\_PM\\_08\\_Attend](http://www.regonline.com/LA_PM_08_Attend).

**Lisa Stotelmyre**  
InterACT at [www.inter-act.us](http://www.inter-act.us)



The “End User” panel helped to shed light on the key PM challenges in various organizations. The panel included **Job Bowdin** of AT Associates (Garda), **Clay Kilpatrick**, PMP, of Nortel, **Alex Azmi** of Metropolitan Water District, and **Sanmay Mukhopadhyay** of Los Angeles County.

The first afternoon session was titled “Implementing an Efficient Project Management Methodology: A Practical Approach Using Technology.” Mike Beard (VBPM) introduced the session and highlighted the inefficiencies inherent in creating and maintaining project documentation. **Sam Stickler** (Novanis) presented one example on how eForms technology can be easily applied to more efficiently produce project documentation. This involves applying standard technology, typically available on desktops, to develop electronic templates that reduce retyping documentation and preserve the data for later reporting/analysis.



**Wednesday, May 7**

## **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, May 7, 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](http://www.pmi-oc.org)

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

### **Questions:**

[membership@pmi-oc.org](mailto:membership@pmi-oc.org)

# **PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING**



**The March PMI-OC Member/Volunteer Orientation Training** was held on the 19th at the UCI Learning Center in Orange (near The Block).

This event yielded another great turnout with many new and renewing members from diverse backgrounds. It's always interesting to hear where the attendees come from, their work history, and where they intend to go from here. That's where the membership team can provide initial mentoring, especially to new members who are looking for PMI-OC direction and career development. Usually, they want to know all about networking opportunities, PMP® prep classes and, of course, how to earn PDUs.

The primary speaker for the event was **Thomas Cutting, PMP**, the membership director who acquired the position in January of 2008. Thomas explained the Orange County chapter in detail, the board of directors roles and responsibilities, how to maneuver around the PMI® website, and, most importantly, the benefits in being a PMI-OC member.

**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. He did all this in about two minutes, although he claims he can do it in one. Keep trying, Ralph! Ralph also brought the food, which made him the most popular guy on campus.

**Melanie McCarthy**, from ResourceXperts offered critical tips and techniques you will need to know about networking in the career marketplace. As most of us have already figured out, finding those dream jobs in the classifieds is a thing of the past. Melanie told us how to make the right contacts to find key opportunities in today's business climate.

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

The meeting location is easy to find by following the directions on the PMI-OC website and in the column at the left. Plenty of food and soft drinks are available for those coming straight from work, and the quality of the food is always tops.

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

See you at the next MVOT.

**Joe Paradiso, PMP**  
Membership Committee Chair



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## 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.

**May 30, 2008 is the application deadline for this scholarship.**

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

## Answers to PMP Exam Questions

From page 11

1. a. **Obtaining the stakeholders' formal acceptance of the project's deliverables.**  
*PMBOK® Guide 2004,*  
Chapter 5, Section 5.4.2.1
2. d. **Project Management Plan, Project Charter, Project Scope Document**  
*PMBOK® Guide 2004,*  
Chapter 4, page 75
3. b. **Three-point estimating**  
*PMBOK® Guide 2004,*  
Chapter 6, Section 6.4.2.4
4. a. **Resource leveling is a tool and technique of schedule development**  
*PMBOK® Guide 2004,*  
Chapter 6, Section 6.4.2

Submitted by  
**Diane Altwies, PMP**  
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## Coming Events

### May 4-7 PMI College of Scheduling

#### 5th Annual Conference

“Scheduling: The Winds of Change”

Drake Hotel, Chicago

See [www.pmicosconference.com](http://www.pmicosconference.com) for details.

### May 7 MVOT

#### Member/Volunteer Orientation Training

See page 14.

### May 13 Dinner Meeting

#### Lois Zells, Ajay Godhwani, Jack Bicer

“Agile Methodology Panel Discussion”

See page 1.

**NOTICE:** Beginning May 13, the dinner meetings will return to the Wyndham. See pages 2 and 17 for details.

### May 15-16

#### PMI San Diego Annual Conference

“Projects Under Fire: A Tribute to Managing Risk.” For details, go to [www.pmi-sd.org](http://www.pmi-sd.org).

### June 7 Advanced Topic Seminar

#### Pan Kao, PMP

See column at right.

### June 10 Dinner Meeting

#### Thomas Cutting, PMP

“Grabbing Authority”

See [pmi-oc.org](http://pmi-oc.org) for details.

### July 5 Advanced Topic Seminar

#### Martin (Marty) Wartenberg

See column at right.

### July 8 Special Event

#### Third Annual PMI-OC Career Fair

Meet representatives from top Orange County companies. Event includes break-out sessions with company executives.

#### Leadership Presentation

John McKee, Business Success Coach

Details will be in June and July *Milestones*.

### August 12 Dinner Meeting

#### Tim Covington, PMP

“Developing Project Managers Who Achieve Project Success”

### September 9 Dinner Meeting

#### 2007 Project of the Year Presentation

### October 14 Dinner Meeting

Reza Lealli, CIO, Wachovia Dealer Services

CIO Panel: Offshoring

*Note: Coming events may be subject to change.*

## ADVANCED TOPIC SEMINARS

### SATURDAY, JUNE 7, 2008



## Create a Project Leadership Plan Using Strength Development Inventory

Presented by Pan Kao, PMP

Do you include a project leadership plan in your master project plan? If not, you should. This highly interactive seminar will demonstrate why you need a project leadership plan and how to create your own through Strength Development Inventory (SDI®) theory.

Learn how to motivate your teams to achieve project goals and deliver successful projects. SDI is one of many popular motivational theories and relationship management tools. At this seminar, you'll find tips on team building, team communication, conflict management, and team relationship building.

The PMI® Leadership Institute Master Class currently uses SDI techniques to train PMI volunteers and future leaders.

**Pan Kao, PMP**, has served on the PMI-OC Board of Directors as Membership Director, Operations Director; and Programs Director. In 2007, Pan was selected to attend the year-long PMI Leadership Institute Masters Class, held in Madrid, Warsaw, and Budapest.

### SATURDAY, JULY 5, 2007



## High Technology and Science Project Principles

Presented by Martin Wartenberg, PMI-OC Fellow

The ability to create and lead “true” teams is absolutely critical to success in both science based and high technology projects.

This topic is one of the few not adequately addressed by the PMBOK® or in the various courses offered through both private sources and public universities. Leadership and team building in the world of science and technology projects introduces a new set of complex variables involving the motivation and personal objectives of very smart and talented professionals. This seminar will address these issues and explore approaches and processes that leaders in this very difficult environment need in order to be successful.

**Martin (Marty) Wartenberg** is Chief Inventor for Zero Boundary Corporation in Carlsbad, California, where he is responsible for development and release of new products. He has also taught project management courses at several University of California campuses and around the world. He is currently the lead instructor for the UC leadership program for bio-technical professionals.

In 2005, Marty was named a PMI-OC Fellow, the chapter's highest honor.

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

**PDU:** 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](http://www.pmi-oc.org)



**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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# PMI-OC Dinner Meeting

## Tuesday, May 13, 2008

Program: **Agile Methodology Panel Discussion**  
Lois Zells, Ajay Godhwani, Jack Bicer

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>	
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Make your reservation by 9:00 p.m. on Sunday, May 11, 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](http://www.pmi-oc.org). Anyone who cancels their reservation after Sunday, May 11, or anyone who makes a reservation and does not attend, will not receive any refunds.



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