



PMI

M I L E S T O N E S

ORANGE COUNTY CHAPTER

JULY 2008 • Volume 20 • Number 7



technisource.



THIRD ANNUAL CAREER FAIR AND BUSINESS EXPO

July 8

BACK BY POPULAR DEMAND AND SPONSORED BY COMPUWARE CORPORATION, this career fair and business expo will feature representatives from **premier Orange County area companies that are actively recruiting**. Meet top executives to discuss career opportunities in information technology, construction, health care, financial services, and other cutting edge industries.

Don't miss the informative and entertaining 30 minute breakout sessions, **"A Day in the Life of a Project Manager at..."** featuring presentations by **Jim Clelland** from Toshiba America Medical Systems, **Jason Richmond, PMP** from Prescription Solutions, and **Sylvan Finestone, PMP** from Computer Sciences Corporation.

Earn up to 1.5 PDUs for these breakout sessions, which means the entire event is worth 2.5 PDUs.



Keynote Speaker John M. McKee

Author of *Career Wisdom: 101 Proven Strategies to Ensure Career Success* and *21 Ways Women in Management Shoot Themselves in the Foot*, **John M. McKee** is one of America's premier executive and business coaches.

From John's keynote address, **"Leadership, Career and Whole Life Success,"** you will garner a new perspective to help you deal more effectively with, and ultimately capitalize on, the numerous demands, challenges and hidden opportunities you face in the workplace every day.

For more information, see page 20 or go to www.pmi-oc.org.

July 8, 2008 • Wyndham Orange County Hotel • Costa Mesa, CA 92626 • 4:00-9:00 p.m.

4:00-7:00 **CAREER FAIR** and Business Expo
4:30-6:30 Breakout Sessions "A Day in the Life of a Project Manager..."

6:00-7:00 **SOCIALIZING AND NETWORKING**
No Host Bar
BUFFET Dinner

7:00-8:30 **KEYNOTE ADDRESS**
John M. McKee
Acclaimed Business Success Coach
8:30-9:00 Raffle Prizes

2008 CHAPTER BOARD

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THE CHAIR'S COLUMN



Recognizing Exceptional Volunteers

Your Board of Directors has been working hard this year at how we can better serve our members. In the process, we focused also on our volunteers since volunteers are critical to the success of our organization and the delivery of quality offerings and services to our members. We value our volunteers' efforts and want them to enjoy their efforts. One of the ways we help accomplish this is via our Recognition Program. Our current means of recognition include the Volunteer of the Month award, Volunteer of the Year award, articles on team projects, and internal team and individual recognition.

Realizing that sometimes we have certain volunteers who deliver exceptional performance and that we didn't have a standard way to acknowledge them, the Board decided to create a new form of recognition, called the **President's Award**. This new President's Award will be awarded to an individual or a team who have far exceeded the normal expectation and provided significant value to the chapter. A key benefit is that this award enables us to better acknowledge a team, not just an individual. Board members are also eligible. It will be awarded at the discretion of the Chair and Board. The Board is very excited about this new form of recognition.

Those of you who attended our June 10 Dinner Meeting witnessed our first presentation of this award to a team of individuals who exceeded expectations in the launching of our new website on May 21. Moving to the new software and platform required difficult challenges including a complete redesign of look-and-feel, process revisions, researching and integrating new supporting services, data conversion, and retraining of volunteers. While there were many individuals from the IT team and other chapter areas who provided valuable service to this initiative, we presented the President's Award to only a subset of the overall integrated team – **Tariq Shaikh, PMP, Cindy Pham, PMP, Lori Shapiro, PMP, Steve Goto, PMP, and Sylvan Finestone, PMP.**

What is next for our PMI-OC Website?

We have received very positive and helpful feedback from you on our website. Our IT team continues to do a great job in stabilizing the site and fielding issues and numerous requests. To improve our effectiveness, we are developing a Configuration Management capability including the establishment of a Change Board. Note that this month we will begin charging a fee for event registration cancellations in order to cover our rising processing costs. We will document this change online in our Event Registration Cutoff and Cancellation Policy.

Great news for members! We are in the process of planning our website's second release. The primary planned scope for this release will be a Member's Only area. This will enable the chapter to deliver special services to only our chapter members which increases your PMI-OC membership value. We thank you for your continued patience as we still adapt to the new system and adjust our processes accordingly. Your feedback on our website is highly encouraged and can be submitted via e-mail to webadmin@pmi-oc.org.

Other Chapter News

Our search for a new Finance Director is well underway. Given this position requires specialty skills that few project management professionals have acquired, the Board and Nominations Committee are being selective. We extended the application deadline. So, if you have accounting or finance experience or if you know a colleague who does, please contact immediately our Nominations Committee at Nominations@pmi-oc.org. Review details on the Current Volunteer Opportunities page on our website.

As a reminder, our **Milestones newsletter** will be moving to digital-only format after this July, 2008 issue. It will continue to be the high-quality and informative publication that you have previously received via postal mail. You can access current Milestones newsletters on our PMI-OC website via the News & Events menu.

Victoria Flanagan
Chair/President

Volunteer Opportunities

Marketing Director: marketing@pmi-oc.org

Website Editors

The marketing team is looking for several volunteers to help with editing our new website.

Web editors will look over all the pages of the website for spelling and grammatical errors and report them to the chief editors. The chief editors will make changes so that every page is accurate and complies with the web page standards that have been established by IT and marketing. Standards include colors, fonts, use of navigation, etc.

This should amount to a couple of hours a week and will give you the opportunity to be

involved in the design and maintenance of our new website.

So, if you are interested in becoming a chief editor or a web editor, please contact the marketing team at 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 elec-

tronically to *Milestones* editors and graphic designer.

Programs Director: programs@pmi-oc.org

Advanced Topic Seminar Reviewers

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 gain free admission to the seminar and earn four PDUs for each event.

Chair/President: chair@pmi-oc.org

Finance Director/Treasurer Position

The PMI-OC Finance Director/Treasurer performs the duties of a controller, manages chapter finances, acts as the corporate treasurer, and is an officer of the corporation and a member of the board.

Candidates must be PMI-OC members with a basic understanding of financial concepts and financial management software. Qualification requirements include: handling and accounting for financial transactions, financial forecasting and reporting, budget preparation and monitoring, strong issue resolution skills, and strong verbal and written communication skills.

Our nominations committee is receiving nominations and applications for this critical position and is interviewing qualified candidates. The committee will make their candidate recommendations to the board of directors (BOD), and the BOD will select and appoint the new finance director. See a detailed job description in the board of directors position descriptions document located on the chapter documents page under the "about us" menu.

For more information, please contact nominations@pmi-oc.org.

VOLUNTEER OF THE MONTH



Jennifer Murphy

Jennifer Murphy, PMP has been a PMI-OC member for only nine months. Her first step was to attend a Member Volunteer Orientation and Training to learn where help was needed. She then volunteered to fill an immediate need in the programs area.

She conducted research for a new dinner meeting venue, headed up the venue expense reduction project, and has also been serving as a venue coordinator. If that isn't enough, Jennifer has taken on the role of programs liaison for the marketing team, helping revitalize the corporate outreach program.

Before moving to California from Detroit (*Let's Talk Hockey*), Michigan, she was a senior program manager for a marketing and distribution company that served the automotive industry. Jennifer earned her PMP® in 2007.

Unlike the hockey player who uses a stick to resolve conflict, Jennifer enjoys using tact and diplomacy to get people with differing views and objectives to work together toward a common goal. Combination of these skills and her top notch communication and project management skills has earned her recognition as our Volunteer of the Month.

Jennifer and her family reside in Oceanside, where she is managing a most important project. That is, parenting at home until her youngest child starts school. As we know, that requires even more specialized process groups and knowledge areas, without well deserved parenting PDUs.

Through her volunteer experience, Jennifer has kept her organizational and management skills sharp and has met many supportive and helpful members. Other members have helped her identify volunteer opportunities that fit her experience and personal goals.

It is a little known fact (until now) that Jennifer can name all 50 states in alphabetical order in less than 30 seconds. This sounds like a challenge when you meet her.



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GRABBING AUTHORITY

June 10 Dinner Meeting Review

Have you ever had authority granted to you and then had it taken away or diminished? Do you have a problem controlling people or situations? Did you ever realize that the problem might have something to do with how you relate to and manage other people?

Our speaker, PMI-OC Membership Director **Thomas Cutting, PMP**, is a project manager/mentor with Cutting's Edge. He has first-hand experience with the problems managers face in using authority to make project teams more productive. His experience spans the entertainment, retail, insurance, banking, health care, and automotive industries. He brings this diverse experience to his training, writing, and conference appearances.

Thomas believes that when morale is low, or a project seems chaotic, it is because the project manager is not using his authority to his best advantage. He notes that it is important for a project manager to understand the different types of authority at his disposal, as well as how he could use them in various types of organizational settings. Thomas names the four main types of authority as positional, referent, reward/penalty, and expert. He said knowing which type of authority to use in every situation is critical to your success as a project manager. In the following paragraphs, Thomas elaborates on each type of authority.

Positional authority arises from one's position in the organizational structure. One can grab it by being a project manager or by delegation of someone else's authority. It is the most common form of authority, but the weakest, because one will not have it for long if she/he was not a good project manager. It is, however, a stepping stone to other forms of authority. It could be abused through acts of discrimination and bullying.

Referent authority comes from the ability to influence others through one's charisma, personality, or charm. This type of authority is effective in building teams and good relationships. If you are fair and just, know your people well, treat people with respect, and are a nice person, you may have referent authority, and people like working for you. However, if you take advantage of this authority for personal gain, at the expense of your people, you could lose it.

Reward/penalty authority comes from one's ability to offer rewards and mete out punishment to others. It uses negative consequences and/or positive reinforcement to motivate people. This authority increases when making performance appraisals and/or giving tokens of appreciation for good work. One has to be careful with giving rewards because people may take advantage and ask for bigger rewards. Some productive uses of this authority are giving honest annual reviews, giving people better assignments and/or responsibility, and recommending promotions. Misusing this authority by rewarding underperformance, or withholding recognition as a punishment may cause more harm than good. Some people may not be motivated by rewards. In these instances, it may be better to use a referent style of authority, or find out what motivates these people.

Expert authority is based on people's respect for one's abilities. It is the highest form of authority one can expect. This type of authority must be earned and consistently demonstrated over time. It is best used in sharing information with others. People gravitate to an expert because they want to be part of a successful project or effort. If you have expert authority, guard against intimidating other people with your knowledge, as this could stifle a free flow of ideas. A challenge is keeping expert authority by staying current with your expertise through continuous learning.

The above four authorities are impacted by organizational management styles, which are a major factor in determining when to use each type of authority. Thomas suggests that you could be an effective project manager in a matrix organization if you (1) use project positional authority as a motivator, (2) use reward/penalty authority in simple actions, such as bringing donuts to a meeting, (3) use referent authority to get to know people, and (4) demonstrate your expert authority by being an effective and efficient project manager. You may need to work up and down the organizational ladder asking



for support from functional managers, as well as finding out what motivates your people, and demonstrating your expert authority with the staff you manage.

In a projectized organization, your positional authority is high because you may be the project manager. Referent authority increases as you get to know your team. Reward/penalty authority can be used to offer training, or better opportunities for staff. It is important to remember that authority in any organization is temporary in nature. To be successful, it is important to develop people for your project, as well as for future projects.

When new to a working environment, it is critical to determine the type of authority you have and build credibility by properly conducting yourself in the organization. Simple things like managing meetings effectively, being on time, and looking professional are important. You may acquire referent authority by having an open door policy, by actively listening to staff, and by asking for input from others.

Thomas Cutting points out that you need other people to accomplish anything of value. In an ever-changing environment, it may take all four types of authority discussed here to manage projects successfully. You can utilize your knowledge, skills, and abilities to acquire and use any, or all, of the authorities discussed above to meet the goals of your organization and its stakeholders.

Pamela Koester, PMP

PMP Exam Questions

Test your knowledge on these sample questions.

1. Your organization's _____ are an example of organizational process assets.
 - a. Defect procedures
 - b. Closed contracts
 - c. Contract administrators
 - d. Mission
2. The code of accounts is _____ used to uniquely identify each element of the work breakdown structure.
 - a. An organizational process asset
 - b. An assumption
 - c. A numbering system
 - d. An environmental factor
3. An output to the contract closure process is:
 - a. Contract closure procedure
 - b. Closed contracts
 - c. Contract management plan
 - d. Procurement audits
4. Your project sponsor has determined the original 24 month schedule in your project plan needs to be completed two months earlier in order to deliver the product to market ahead of the competition. You believe you can achieve this new deadline by compressing project activities. This approach you plan to apply is an example of:
 - a. An assumption
 - b. A constraint
 - c. Fast tracking
 - d. Crashing

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

Answers are on page 13

Lori Shapiro, PMP, PMI-OC member and volunteer, is in the spotlight this month. A long-time resident of Orange County, Lori has lived in Southern California her entire life. Lori is an IT senior project manager for Applied Computer Solutions, a women owned value added reseller (VAR) representing Sun, NetApp, HP, Symantec, Cisco, and Juniper solutions, with headquarters in Huntington Beach. Lori has been in the IT field for the past 27 years, with 15 of those years in project management/business analysis.

Lori's interest in PMI® began when she heard about the organization while a member of another local professional organization. When asked why she is a member of PMI-OC, Lori stated, "Networking with others in the same field has always been important for me, both professionally and personally. I have found exceptional people in the PMI-OC volunteers. This is a large organization of PM professionals who are willing to give their time and experience to help better the field of project management."

During the course of her career, Lori has used project management extensively in managing and successfully implementing both large and small IT-related projects. Her interest in the IT profession began early. As Lori recalls, "I've been in love with computers/computing since junior high

school. However, when I saw my first computer in seventh grade (early 1970s), I was told computer classes were for boys, so I had to take a home economics class, and I hated it. Just to prove them wrong, in 1989 I earned my Masters Degree in Software Engineering!"

A highlight of Lori's career was when she was named "best speaker" at a conference in Albuquerque, which resulted in an invitation to speak at the Australasian conference in Sydney. Lori remembers, "I took advantage of the two day conference and spent three weeks touring Australia."

In addition to being a member, Lori is also a PMI-OC volunteer. Lori's interest in volunteering began at her first PMI-OC dinner meeting when she met **Sylvan Finestone, PMP**. Sylvan suggested that Lori become involved with the chapter. Initially, she declined because she was preparing for the PMP exam, but after she passed, Sylvan approached her again about volunteering, and this time she agreed.

For the past year, Lori has been involved with the membership committee as the ambassador co-chair and most recently with the PMI-OC website redesign project, assisting with the graphics and website look, feel, and overall layout.

According to Lori, "I've really enjoyed my involvement in PMI-OC and have made some great professional contacts." The chapter has recognized Lori's involvement by naming her Volunteer of the Month for May 2008, and she was one of the recipients of the new President's Award for Outstanding Contribution, presented at the June dinner meeting. See article and photo on next page.

On the personal side, Lori enjoys geocaching (an outdoor treasure hunting game using a global positioning system), sailing, traveling, and volunteering. On a professional note, she would like to take on larger, more involved projects, while earning her ITIL certification, as well as Six Sigma Green and Black Belts. Lori's advice to chapter members: "For members who like to watch from the sidelines, get involved in the chapter's events and activities. This chapter is run by volunteers. There's something here for everyone. Putting yourself out there allows you to build your network and will greatly help in times of job transition, and in just enjoying your profession."

If you want to learn more about geocaching, please see Lori at the next dinner meeting and she will be happy to answer any of your questions!

Bernice Maldonado

PRESIDENT'S AWARD

FOR OUTSTANDING CONTRIBUTION

For well over a year, the PMI Orange County Chapter has recognized the need for a new website. At the beginning of June, that new website became a reality, thanks to the dedication of the IT team and several key contributors. In special recognition of this accomplishment and the exceptional performance effort exhibited by a select group of individuals, the PMI-OC Board of Directors has created the **President's Award for Outstanding Contribution**.

Prior to this, our recognition program focused on reliability, outstanding support, and consistent delivery, but didn't address individuals who set themselves apart by delivering exceptional performance resulting in significant benefit to the chapter.

The first President's Award recognizes and honors a core team of individuals who went above and beyond the call of duty in the development of the new www.pmi-oc.org. This team consisted of **Tariq Shaikh, PMP; Sylvan Finestone, PMP; Cindy Pham, PMP; Lori Shapiro, PMP; and Steve Goto, PMP**. Together they handled both technical and contract issues to bring us an absolutely superb website: negotiating with the vendor, Affiniscape; contacting other PMI® chapters to gather lessons learned; presenting an implementation plan that was cost effective; and carefully managing scope to complete on schedule.

Tariq took the lead, working with the vendor, collaborating with other chapters, performing research, presenting to the board, and providing technical oversight. His role as a calm and supportive leader, always ready to assist and to investigate issues while providing insightful and appropriate resolution was and, continues to be, greatly appreciated. Tariq's handling of all the external issues allowed the team to continue to move forward with the internal activities needed to guarantee success.

Sylvan documented the scope of the website initial phase, clearly outlining where the team was to focus their efforts. His presence on the board kept it from deviating or adding to this effort. His encouragement and efforts behind the scenes pushed the team forward, while keeping the path clear.

Cindy Pham provided hours of technical support for the implementation and took the point role in Tariq's absence. She patiently responded to comments and issues as we approached go live. Without her continuous attention to detail, we would not have met the deadline. To this day she remains available for immediate fixes and bug resolution, helping us to keep the site up and running as we work our way through the shake down period.

Lori Shapiro provided timely and professional hands on support in the critical weeks before the go live. Through her past experience, she located a website with photos that were mined for the banner page at no cost to the chapter. Then she selected, resized, and added the images to the website. There are many more examples where Lori spent hours of her own time analyzing situations, developing solutions,

and entering content while coordinating with the team.

Steve Goto represented the marketing team, which has ownership for much of the site's content. Steve tirelessly worked with the team and coordinated the customer input that resulted in the look and feel of the site. Steve also provided many support hours as he worked through technical problems that surfaced in the development process. The results of this effort are evident in the layout of the website. We look forward to Steve's continued input as the website grows and matures.

Please join the PMI-OC Board of Directors in recognizing this outstanding team with our first ever President's Award for Outstanding Contribution.

Thomas Cutting, PMP



Left to right: Sylvan Finestone, PMP; Lori Shapiro, PMP; Cindy Pham, PMP

Not pictured: Tariq Shaikh, PMP; Steve Goto, PMP

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- Peter Davis
- Andrae Frierson
- Matthew Grimaldi
- Lisa Guedes
- Mark Haraga
- Lynn Henderson
- Tim Hohmann
- Susan Iannaco
- Michael Keppta
- Chris Koslosky
- Agnes Lago
- Roxanna Lake
- Kamsuth Lam
- Todd Marsh
- Chris Marshall
- Hannelore Myers
- John Ngo
- Muhammad Niaz
- Nicole Nixon
- William Phinzy
- An Ching Phone
- Nicholas Schoeneberger
- Matthew Sewell
- Lily Sieu
- Cherin Smith
- Brian Sparks
- Lawrence Stephenson
- Servando Varela
- Mark Weller
- Peter Werrenrath
- Tom Yuan
- John Zhao
- Sharon Radcliff
- Eddie J. Rangel
- Michael Rhymer
- Darin Rich
- Michael Roach
- Michael Schroeder
- Paul Thorp
- Ernest Vance
- Tim Watson
- Rhonda Wheelchel

NEW PMPS

- Mohammed Alam
- Emma Dennies
- Nicholas Duran
- Joy Farrell
- James Hensley
- Benedict Idu
- Arthur Laski
- Hamid Noorian
- Sharon Radcliff
- George Sevelle
- Cherin Smith

At the June Meeting

Clockwise:
 Checking in at the June dinner meeting
Renata Weir, PMP; Susan Ashwell, PMP;
and Craig Wilson, PMP
Sylvan Finestone, PMP chats with **Beth**
Williams, PMP and **Rod Hendrixson, PMP.**
 New PMPs: **Christi Valley, Tunde Deru,**
Carol Hicks, and Renata Weir
Louis Knutson from **Compuware**
Corporation, June vendor showcase and
 Gold Level Sponsor
Craig Wilson, PMP; Victoria Flanagan;
and Linda M. Keller, PMP

Photos on pages 3, 5, 7, and 9
 by **Simon Hawkins, PMP**

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MOUNTAIN GOAT
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Volunteers + Teamwork

Fabulous Website Redesign

As many of you may know, PMI-OC's new website was officially launched on May 20, 2008. Several PMI-OC volunteers worked tirelessly to launch the new and improved website at www.pmi-oc.org. The entire site, which was created with collaboration between chapter volunteers and a third-party vendor, has been completely overhauled, with a fresh new design, an easy to use site search area, and many new features.

Some of these features include a new content management system, allowing for easy modification of all web page content, image and document uploading, modification of web page navigation areas, registration with automatic deactivation of events, fee collection system, event registration notification, a "members only" area which is fully customizable to the chapter, and banner area customization. Members should not panic, as a frequently asked questions section for those seeking information is still available. Other features include updated sponsor and recent event photo FLASH banner areas and a career center for job posting.

According to the website project team, utilizing a third party vendor, Affiniscape, allowed the chapter to have a more robust website. The website is set up in modules, including the website pages with complete back end content management, a robust registration process, chapter events calendar, survey module, members only access area, and a career/job posting module.

The road to finding the vendor began with an evaluation of various competitors' offerings by comparing their functionality and website look against the project team's requirements. Final vendor selection was made using special consideration of cost and customer support as reported by other PMI® chapters using Affiniscape.

Once the decision was made and contract negotiations were completed, the team worked closely with Affiniscape's support group in designing the website graphic template drop down menus, and implementation of user-friendly features and functions. According to the team, the support group was very responsive in providing the necessary support in creating the website's pages, links, and graphics.

When asked what the team liked most about the new website, the team's responses included:

- Flexibility and ease of use
- Good support from the vendor
- Administration based on roles
- Membership database that is integrated with the registration module
- Flexible event calendar that is directly linked to event registration

As with any other project, the team chalked up lessons learned while working on the new website. Nevertheless, they were able to successfully navigate through changes and initial challenges, including the transition of one board of directors to another, website team changes, development of a process to ensure the continuity of the web page look and feel, and the formation of a change management board to ensure sustainment of the website. Through it all, the

Continued on page 12

Welcome to PMI Orange County Chapter

New Website Launched - May 20, 2008

The Chapter has worked hard the past six months to create a new look and feel for the PMI-OC Chapter's Website, and here it is! Please take a few minutes to review the entire site. We've listened to our members and have implemented a new Event registration system which should make it easier to register and pay for our events.

We hope you like the new site and we welcome your feedback! Please email webadmin@pmi-oc.org for any site functionality issues, and marketing@pmi-oc.org if you have suggestions on site

Website Redesign

Continued from page 11

team was able to engage all the volunteers to build the various content pages, train all chapter volunteers responsible for loading in the various content pages, and transition the responsibility of updating/ changing the website pages from IT over to the various groups involved.

The over-arching goal of the team was to expand two-way communication in order to increase member value and participation. In response, website visitors will find event calendaring to allow the members to be aware of and to plan for their participation, valuable information that can help in career development and job search, and links to commonly used websites.

According to the team, the greatest accomplishment was the dedication demonstrated by board members and committee volunteers in finding a reputable third party vendor and in launching the new website, both of which required long hours and cooperation by all. Visit the website and see for yourself; the results speak for themselves!

Special thanks go to the following for assisting in this six month effort:

Tariq Shaikh, PMP, IT Director, for leading the IT team and PMI-OC, coordinating with all third party vendors, all PMI team leads and implementing the website earlier than expected. All this in between his extensive travels to Asia.

Cindy Pham, PMP, IT Technical Lead, for training the team. Cindy provided ongoing administrative and technical product support ensuring the website and all back end modules were set up and functioning properly.

Lori Shapiro, PMP, Membership and IT. Lori joined the website team a month before launch, and provided invaluable and timely effort in creating all of the banner images in one single night and standardizing all the web pages in the weeks prior to implementation.

Stephen June, PMP, Finance, for testing and reconciling all the event registrations.

Elizabeth Bond, IT, for vendor software selection and comparison analysis.

Gerald Julius, IT, for vendor software selection and comparison analysis.

Thomas Cutting, PMP, Membership Director, for building the membership database, ensuring data integrity and developing the offerings in the members only area (phase 2).

Steve Goto, PMP and **Linda M. Keller, PMP**, Marketing Director, for branding and giving our web pages a unique look and feel that set us apart from the other chapters.

Judith Berman, PMP and **Renata Weir, PMP**, Programs Director, for setting up all the events: dinner meetings and the advanced topics seminars and transferring the registration information from the old website to the new one.

Victoria Flanagan, Chair/President, for prioritizing all efforts, keeping everyone focused, and providing leadership and guidance on the overall website re-design project.

Sylvan Finestone, PMP, Chair-Elect, for coordinating all the group leads and insuring that all groups provided the required web page content.


Bernice Maldonado

Event Listings


Month/Year: Event Type:

Show Holidays:


June 2008

<input type="checkbox"/>	Date(s)	Event Name	Location	Registration
<input type="checkbox"/>	10	June Dinner Meeting	Wyndham Orange County	 Registration has ended

July 2008

<input type="checkbox"/>	Date(s)	Event Name	Location	Registration
<input type="checkbox"/>	8	July 8 Special Event - Career Fair - John McKee, keynote speaker	Wyndham Orange County	 Click here to Register

August 2008

<input type="checkbox"/>	Date(s)	Event Name	Location	Registration
<input type="checkbox"/>	12	August Dinner Meeting	Wyndham Orange County	 Click here to Register



ORANGE COUNTY CHAPTER

A New Future for MILESTONES

As I contemplate the new digital only format for *Milestones* coming in August, I remember events in my own life that have caused me to move out of my comfort zone and to grow.

I recall one event that many of you may relate to. Do you remember when you first learned to ride a bicycle? I remember that, as a young child, life on a tricycle was good. But the time came to graduate to a bicycle because I had outgrown the three wheeler that I was so fond of. Besides I had to pass my "trike" on to my younger brother. My cousin taught me how to ride a two wheeler. Can you imagine the horror I felt as my cousin launched me down the sidewalk, telling me to pedal fast, not to look down and, to steer straight? Learning to ride a bicycle took courage, but after a few bumps, scraped knees, and bruises, I finally learned to ride. Life, as I knew it, became even better. I could ride faster than ever and travel farther than I ever imagined. By moving from my comfort zone, new adventures opened for me.

This July *Milestones* is the last printed issue that will be mailed to our members. The newsletter will still be available to you at www.pmi-oc.org, but some of us will need to move out of our comfort zones to get the latest chapter news by going to the website. Just to let you know, I do not get my news from the local paper because I just do not have the time. I indulge now and then by reading the paper, but for the most part, I obtain the latest news through online sources. It should not be much different to do a few more mouse clicks to see what is happening at PMI-OC.

Milestones became a quality newsletter not because it was printed on paper, but because PMI-OC offers quality programs and value to its members. The *Milestones* editors have worked hard in the past to establish *Milestones* as a premier professional publication for the chapter, and the current and future editors will continue to build on that great foundation. We will continue to bring you companion articles from outside contributors to augment information presented by our dinner meeting speakers. We will continue to focus on chapter members in our *Member Spotlight* columns. We will continue to bring you the *Letters to the Editor* column where the members of the chapter can have their project management questions answered. We will tell you about the events in the chapter that have made us great, and we will strive to continue in that tradition.

I am looking forward to a new and brighter future for *Milestones*. I see growth and many new adventures for PMI-OC, and it will all be documented on the digital pages of *Milestones*.

Roger Lew, PMP
2008 *Milestones* Co-Editor

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Answers to PMP Exam Questions

From page 6

1. a. **Defect procedures**
PMBOK® Guide 2004,
Chapter 4, page 84
2. c. **A numbering system.**
PMBOK® Guide 2004,
Page 354
3. b. **Closed contracts**
PMBOK® Guide 2004,
Chapter 12, Section
12.6.3.1
4. b. **Crashing**
PMBOK® Guide 2004,
Chapter 6, Section 6.5.2.3

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Create a Project Leadership Plan Using Strength Development Inventory

Pan Kao, PMP presented the June Advanced Topic Seminar, “Create a Project Leadership Plan Using Strength Development Inventory.”

After an introductory exercise to help the class get to know each other, we jumped right into learning about creating a project leadership plan (PLP) and how we can use it to assist us in keeping our jobs, sharing our vision, and motivating others.

As an example on the importance of a PLP, Pan gave us a sheet of paper with a number exercise on it. Without instruction, the class did poorly in accomplishing the task. Next, Pan gave us the number exercise again, this time providing us instructions and tips on how to complete the task. With this guidance, everyone worked faster at the exercise and achieved better results. Clearly, having a few tools and techniques can assist us with doing our jobs.

A PLP is a plan/framework to:

- provide and communicate the project plan
- foster team collaboration
- motivate others to get the job done.

In essence, we can consider a PLP to be a toolbox.

How do project managers build a PLP? By focusing on the triple constraints: scope, time, and money.

Scope activities focus on team motivation, This is an intangible skill that is invaluable not only in bringing teams together, but also for managing consultants and vendors. Some tips include team building activities and face to face contact.

For the time constraint, we learned that PMs need to focus on the appropriate time to perform the scope activities. Team building should be scheduled in the early stages of the team life cycle. One on one activities should be performed in all stages of a project (think lunch meetings and happy hours).

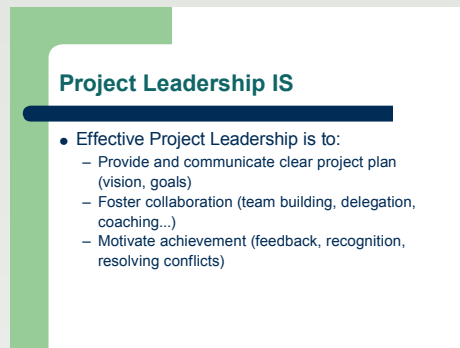
Money is the most difficult constraint (we can all agree that going over budget sends management into a tizzy!). This may require some creativity, for example: dipping into management’s reserve fund or allocating funds for awards and bonuses.

How can a project manager build his toolbox arsenal? By emphasizing his strengths, as uncovered by the strength deployment inventory (SDI). According to SDI, motivation drives behavior. We can all be motivated toward the same goal, but our behavior to achieve that goal is different. A helpful analogy is to consider driving a car. We may all drive the same car, but how we drive is different for each of us.

Here we were introduced to the relationship awareness theory, which builds upon the discussion of behaviors and perception. Pan told us that the relationship awareness theory examines a person’s most predictable motive for behaving in one way most of the time and shifting to other styles at other times.

There are four premises of relationship awareness:

1. Behavior is driven by motivation.
2. Motivation changes in conflict.
3. Personal weaknesses are overdone strengths.
4. Personal filters influence perceptions.



Pan Kao, PMP with **Deborah Calazza**, Keller Graduate School Admissions Advisor

To prove the last point, Pan held up a black object and asked us what it was. We all had various guesses: A lipstick case? A flashlight? Glasses holder? In reality, it was a case to hold chopsticks. Clearly, our life experiences impact our perceptions.

Pan then provided the class with a folder containing an exercise (“Portrait of Personal Strengths”). He gave us a series of strengths (e.g. trusting, analytical, devoted) and asked us to rank them on a pyramid, based on how we perceive ourselves.

This pyramid portrait helped us to be aware of how we prioritize our strengths. We then calculated our totals, which gave us a personal strength ranking on a color scale of blue, red, green, and HUB.

Blue individuals are altruistic and nurturing. They are concerned with the protection, growth and welfare of others. They seek ways to help others and defend the rights of others.

Continued on page 16

June 7 ATS Review

Continued from page 15

Red individuals are assertive and directive. They have concern for task accomplishment, concern for the organization of people, time, and money to achieve desired results. They are alert to opportunities and accept risk taking as necessary and desirable.

Green individuals are analytical and highly autonomous. They're concerned that things are properly thought out, meaningful order is established, and self-dependence is preserved. Their valued relating style includes being principled, practical, and fair.

HUB individuals are an even mix of the above three colors. They have concern for flexibility, the group's welfare, and members' needs. They are curious about what others think and feel. They like to be known by a lot of people and like to be known as flexible.

Knowing his personal strength portrait will help a project manager handle and resolve conflict, both personally and professionally. By creating a PLP using the SDI and assessing his personal strengths, the PM can improve his relationships, reduce misunderstandings, and obtain better results.

Sabina Horigan, PMP



Photos by Louie Chanco, PMP

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PMI-OC Leadership Institute 2008



The Second Step: Finding the Leader Within

Becoming the Leader We Want to Be!

We embark on the second step of our journey, appropriately addressed as “Finding the Leader Within.” It has been over three months since we initiated this journey together, and we are back together once again. Sadly, we are missing a few of our compatriots because of “life events,” which have pulled them away, but we know they are here in spirit. Our leader, **Dr. Jerry Brightman**, was as enthusiastic and optimistic as when we first began this process, and he was ready to encourage, push, challenge and cajole each and every one of us to “take the next step,” whatever that might be for each team member.

PMI Orange County, which is sponsoring this program, decided that to be a fiscally responsible organization, we should venture out and try a new venue in which to continue this journey. We moved from the Wyndham Hotel in Orange County to DeVry University, The Keller Graduate School of Management. It worked!

We became even more proficient at shuffling the furniture around to facilitate our group discussions. The classroom desks were a little at odds with the fabulous catering that Deli 456 provided. The reason being that, as the more we imbibed of the wonderful arrangements of food and snacks, the harder it became for us to easily get up and navigate between our chairs. In other words, we were very well taken care of. Now all the excuses we could possibly think of not to take the next step had been removed, and it was left up to each of us to decide how big a step we could manage.

At times I think we all asked, “Why we are here. Are we really going to reach that *ah ha* moment? Would the light bulb finally go on?” We pondered “the wall exercise,” and wondered how a six word autobiography would help us decide if we could find that leader within us.

Could a creative writing exercise and an attempt at telling a story with a teachable point of view get us out of our fog? I would hazard a guess that as a group of PMs, writing or telling creative stories would not rank high on our list of top skills, and if it were, I’m sure we would have pursued a different career. Our fearless leader, even after seeing the looks of disbelief and fear in our faces, kept his course and pulled us through. There was much laughter, even some tears, but in the end, as a group of very supportive individuals, we held tight.

Everyone facilitated the process as we each took the next critical step in becoming more aware of our inner strengths and the vision we were creating for ourselves as we evolve into the leader we strive to be, and can be! For that we need to thank Jerry! We need to thank him for stepping up to the plate and leading the charge as he helped us face our fears.

I can hardly wait for the next encounter, as we are now firmly bound at the hip, as Jerry would say! There’s no backing out now! Until then, we will keep working the dream and making it our reality!

Renata Weir, PMP

Mr. CAP “M”

Organizational Positioning of CAPM® Candidates



A series of columns by
Frank P. Reynolds, PMP

“Organizational Structures” in the PMBOK® Guide highlights how project managers benefit from CAPM qualified participants. This is not apparent from Figure 2-6: “Organizational Structure Influences on Projects.” Functional, weak matrix, and balanced matrix organizations don’t highlight benefits from project-certified participants.

Functional structure applies to projects done for and by a single organization. Project management uses project administrators, facilitators, or supervisors. There’s little recognizable project-skilled authority or preparation for such roles. A functional unit can benefit from CAPM qualified participants. Part time, operations oriented CAPM holding participants are supervised by their functional manager who acts as part time project manager. Trained participants make better risk owners and critical activity performers. They also monitor and control scope, schedule, and cost.

Staffing demands on projects conducted for a client by other functional units or by outsiders are overlooked. A sub-project supporting an “outsider-run” project often takes place in an under skilled functional organization that is supposed to benefit. Vendor project managers are often dedicated to a project. These managers are dependent upon the functional unit for project staffing. The project staffing is preferably enhanced by CAPM participants. A primary project manager also depends on the benefiting organization’s sub-project use of project-skilled performers to handle operational transition to produce expected benefits.

In matrix organizations, participants work for two or more managers. Project-centered business processes conflict with the operational processes. A project’s progressive elaboration depends on input from CAPM skilled participants in functional units.

In a projectized organization, progressive elaboration dominates the rhythm and pace of work. Performance of operational activities conducted by project administrative staff is improved by CAPM skilled team members. Ongoing processes for communications, contract administration, and quality management depend on project-certified staff for the sequence of different phases from initiation to closure.

Wednesday, July 16

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, July 16, 2008

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

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

Program starts at 6:30 p.m.

Where:

UCI Learning Center, Orange Room 203

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

A map can be found at the following URL:

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

Cost:

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

Register:

www.pmi-oc.org

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

Questions:

membership@pmi-oc.org

PMI-OC MEMBER/VOLUNTEER ORIENTATION TRAINING

The most recent PMI-OC Member/Volunteer Orientation Training was held in May at the UCI Learning Center in Orange near "The Block" shopping center. The evening was remarkable for the enthusiasm the participants brought to it, and the positive response we received was overwhelming for the brief, but very informative, session.

Whether new members, or returning members, those attending the event expect to become more informed about what PMI® and the chapter can do for their career development as a project manager, or in a related field. These expectations are usually met or exceeded, and this meeting was no exception.

The primary speaker for the event was **Sylvan Finestone, PMP**, our chair-elect, because **Thomas Cutting, PMP**, our membership director, was out of town. Sylvan explained in detail about the Orange County chapter, the board of directors' roles and responsibilities, volunteering and, most importantly, the benefits of being an active PMI-OC member.

Ralph Dutra, our volunteer coordinator, explained how to become a volunteer and what current opportunities exist. He also explained why this organization depends on volunteer involvement to run as well as it does. Ralph pointed out that a member can volunteer for any number of tasks that are vital to the smooth running of the chapter. Thanks to Ralph's efforts, we recruited several new volunteers this month.

Lori Shapiro, PMP, our ambassador lead, spoke about an ambassador's role in the chapter and how this volunteer position is a great starting place for a new volunteer. Lori also explained the "dot" system: how wearing colored dots helps new members and first timers attending events feel more comfortable. To facilitate connections, there are also dots for those offering employment and those seeking new positions.

This event would not be complete without **Melanie McCarthy**, from ResourceXperts. Melanie provided critical tips and techniques one needs to know about networking in today's fast moving career marketplace.

The meeting concluded with questions and answers. There was also ample opportunity for members to speak with one another, directors, and the membership staff.

The next meeting will be conducted on July 16 at 6:00 p.m. Delicious food and soft drinks will be served, and parking is free. The meeting location is easy to find by following the directions on the PMI-OC website, or through the link in the adjacent column. It just can't get any easier!

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

See you at the next MVOT.

Joe Paradiso, PMP
Membership Committee Chair



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ADVANCED TOPIC SEMINARS

SATURDAY, JULY 12, 2008



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.

SATURDAY, AUGUST 2, 2008



MS Project: Hands-On Training

PART 2

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

This seminar teaches you more advanced topics in MS Project, specifically, taking the output from MS Project and creating tools to show if the project is on track, behind schedule, obtaining EVA from MPP, and reporting to the upper echelons. Dos and don’ts and using Microsoft Office as the reporting software.

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 (except holiday weekends), 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

Coming Events

 **July 8 Special Event**

Third Annual PMI-OC Career Fair and Business Expo


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

Keynote Speaker

John McKee, Business Success Coach
See pages 1 and 20.

Event sponsored by
Compuware Corporation




 **July 11 So Cal Pharma LIG**

Breakfast Meeting

Watch www.pharmalig.org for details.

 **July 12 Advanced Topic Seminar**


Martin (Marty) Wartenberg
See column at left.

 **July 16 MVOT**


Member/Volunteer Orientation Training
See page 18.

 **August 2 Advanced Topic Seminar**


Mike Graupner and Gene Senecal
See column at left.

 **August 12 Dinner Meeting**

Lee R. Lambert, PMP
“Saying Yes When You Really Mean No:
Delivering Truth to Decision Makers”

 **August 22-23 SoTeC**


Southland Technology Conference
Formerly known as SCCTC
The Westin Long Beach
See page 20.

 **September 9 Dinner Meeting**

Project of the Year
Paula Campbell
Southern California Edison

 **September 13, 2008**

PMP Exam Prep Workshops Begin
Laguna Hills and Costa Mesa
See page 21.

 **Sept. 25-28 Seminars at Sea**

Sponsored by PMI San Diego Chapter
Watch www.pmi-sd.org for details.

Note: Coming events may be subject to change.



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PMI Orange County Chapter Announces Its 2008 Fall Course



PMP EXAM PREPARATION WORKSHOP

Six Saturdays Beginning September 13, 2008

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

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

NEW THIS FALL: PMI-OC is partnering with The Project Management PrepCast™ to make their downloadable podcast available to our PMP prep students. Developed by former PMI-OC Chair/President **Cornelius Fichtner**, The Project Management PrepCast™ consists of 89 episodes, each of which focuses on one concept or process. Download them directly to your computer or iPod and listen when, where, and as often as you want to each episode to enhance your understanding of the concepts, tools, and techniques you learn in the class. More details to come in the next edition of *Milestones*. In the meantime, see Cornelius' article on page 00.

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

Sept. 13	Sept. 27	October 18
Sept. 20	October 4	October 25

Where: Laguna Hills

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

Costa Mesa

University of Phoenix
South Coast Learning Center
150 Bristol Street
Costa Mesa, CA 92626



Cost: The workshop fee is per participant, payable at the time of registration. Classes fill very fast, so get your registration and money in early to guarantee a seat. **Register by September 3 to receive a special discount!**

- **PMI Member: \$750 before September 3, \$800 after September 3**
- **Non Member: \$850 before September 3, \$950 after September 3**

Register at www.pmi-oc.org

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

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

PMI Orange County MILESTONES

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MILESTONES is published for the members of the Orange County Chapter of the Project Management Institute for the purpose of notifying members of meetings, chapter activities, member accomplishments, and to provide information regarding project management in local business and government agencies. Advertising is welcome. However, its publication does not constitute endorsement by the chapter or the Project Management Institute.

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www.keller.edu
Management Concepts 14
www.managementconcepts.com/sins
Mountain Goat Software 10
www.mountaingoatssoftware.com/pmi
OuterCore Professional Development, LLC 16
www.outercoreinc.com
Project Auditors LLC 14
www.ProjectAuditors.com
Project Insight 4
www.projectinsight.net
RMC Project Management, Inc. 16
www.rmcpjproject.com
UC Irvine Extension 14
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Project Management Institute
Orange County Chapter, Inc.
P. O. Box 15743
Irvine, CA 92623-5743

PMI-OC Dinner Meeting

Tuesday, July 8, 2008



Program: **Third Annual Career Fair and Business Expo**
Keynote Speaker, John M. McKee

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

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

Cost: **Dinner and Presentation**
In Advance: *At the Door:*
Members \$40.00 Members \$50.00
Non-Members \$45.00 Non-Members \$50.00

The "presentation only" option is not available for this event.

Parking: **FREE!**

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 10:00 p.m. on Sunday, July 6, for the "in advance" price. Reservations made after this time will be charged the "at the door" price.

If you are unable to attend, please cancel your reservation at www.pmi-oc.org. Anyone who cancels their reservation after 10:00 p.m. on Sunday, July 6, or anyone who makes a reservation and does not attend, will not receive any refunds.