

# Milestones

February 2009

Monthly Publication of The Project Management Institute, Orange County Chapter, Inc.

February 10  
Dinner Meeting

## MANAGING CHANGE IN A *FLEXIBLE* WORLD



**Steven Mauss** has directly managed all facets of Knowledge Relay, LLC since 1992. He brings over 30 years of experience in operations and information technology to his role as president and chief operating officer. Before Knowledge Relay, Steven held several executive positions in the high tech industry, including vice president and general manager of American Netronic, Inc.

While working as a senior systems analyst for Rockwell International, Steven designed and oversaw the deployment of a comprehensive engineering business automation system to improve business intelligence gathering, analysis, and visualization. He also helped Rockwell win multi-billion dollar defense contracts.

**Speaker:**  
**Steven Mauss**  
**President and COO of Knowledge Relay, LLC**

The chairman of Suzuki motors once said, "Workers come to factories to work, not to walk." He set about using available technologies and strategies to empower his people to become more productive and happier by reducing the amount of walking around they had to do.

Technology constantly changes the options we have for how we accomplish work. It is an ongoing process, and it has a large impact on the environment within which an organization functions. Technology introduces logistical, mechanical, AND social changes that need to be recognized, even embraced, if we are to effectively implement state-of-the-art program and project management strategies in diverse organizations.

In his presentation, **Steven Mauss** discusses how to develop a planned, yet flexible, approach to managing change in an organization. By taking into consideration multiple dimensions of change, including human factors, logistics, and mechanical, the risk of failure associated with implementing positive change is greatly reduced.

For details, see page 16, or [click here to register](#).

## 2009 CHAPTER BOARD

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chair@pmi-oc.org

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chairelect@pmi-oc.org

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atlarge@pmi-oc.org

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finance@pmi-oc.org

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it@pmi-oc.org

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marketing@pmi-oc.org

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Operations Director/Secretary  
operations@pmi-oc.org

**Derek Barraza, PMP**  
Programs Director  
programs@pmi-oc.org

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## THE CHAIR'S COLUMN



Last month I wrote about our new initiative, the Enhanced External Collaboration (EEC), and I promised to share the idea in this column. Interestingly, it helps us to answer the questions we have already posed.

Before I challenge each of you to support our EEC initiative, let me show you our vision, how we see this benefiting both parties as a quid pro quo.

In our EEC effort, we plan to increase our visibility in the Orange County marketplace by increasing our footprint with the companies that are most likely to need our services. We want to work with companies and support their long term training goals with our classes, to support their knowledge growth through our advanced topic seminars, and to have them partner with us in major efforts, such as the career fair.

Not only do we want to work with companies, we are also want to work with other organizations, such as AIPCS, the Society of Business Analysts, risk managers, and education based organizations.

The concept is that when we open up dialogue with the companies, we will represent the entire spectrum of project management related organizations in Orange County to the targeted companies.

In return, we are looking for sponsorships and for guaranteed attendance at our events at company purchased tables. We will provide a value proposition that is mutually beneficial to all of our members, similar organizations, and the participating companies. This is more than having them participate as individuals at our events; this is the expectation of a value proposition from both parties.

To make this happen, we are need your help. If you work for a company in Orange County that is interested in establishing this relationship, or would like to start this idea in your own company to expand employee benefits as a low cost, low risk paradigm, this may very well be an opportunity for you individually or for you to bring to your management's attention. In this time of scarce training dollars, we see this as a valuable leverage point where companies can offer low cost benefits to their project management tracked employees.

**Lori Shapiro, PMP**, our marketing director, is the contact person for this effort, and I am also available to discuss opportunities at your organization.

Changing gears, let me share some of our accomplishments over the last month. First, we have now fully engaged our website upgrades and have the members only area. For those of you who have been registering for our events, using the members only area has made the process much easier. The configuration management team, led by **Stephen June, PMP**, is already at work on the next upgrade, to be announced later this year. Stephen is supported by **Tariq Shaikh, PMP**, the IT director, and **Cindy Pham, PMP**, among others. We have a new webmaster, **Atul Singh, PMP**, who is rapidly coming up to speed and assuming greater responsibility in website management.

We are moving forward with our final 2009 budget, and we have a number of exciting plans coming together. We are planning on our career fair event in July; we will celebrate the 20th anniversary of our chapter in September; and we will soon be announcing our mega advanced topic seminar event in November.

By the time you read this, we will have started our first PMP® prep workshop for 2009, and we plan to have at least two more. The PMP examination changes on June 29th, and we will conduct our second session to provide one last chance for our members to sit for the current exam. Plans are already underway to upgrade the class for the PMBOK® version that was released in December.

We are also planning the first CAPM® class offered by the chapter, with more information coming out on that soon.

For those of you who are in transition, are you aware that we have a job board in the members only area? You can access this at <http://pmi-oc.org/jobbank.cfm>, and it does have many opportunities. We have had over 200 postings on this board, many of them unique or primary postings by PMI-OC. You may also want to look at the privately monitored [social\\_networking@yahoo.com](mailto:social_networking@yahoo.com), as another source for current job postings.

Until next time.

**Sylvan Finestone, PMP**  
2009 Chair/President

# Volunteer OF THE MONTH

## Volunteer Opportunities



Simon Hawkins, PMP receives a certificate of appreciation from Volunteer Coordinator Beth Williams, PMP

## SIMON HAWKINS

The PMI-OC Board of Directors recognized **Simon Hawkins, PMP** as Volunteer of the Month for January 2009. Each month chapter members look forward to scanning the pages of the current edition of *Milestones*, for photos and articles from the events of the previous month. It's exciting to see the faces behind the names of chapter members, speakers, and PMI-OC partners.

Those cherished memories are captured by chapter volunteers who donate their unique talents, time, and equipment to make sure those photos from chapter events are logged, distributed, and are good quality. Simon answered the call back in 2007 as a *Milestones* photographer and has been a dedicated volunteer at dinner meetings since. He is an avid photography enthusiast and has traveled extensively, capturing lasting memories and publishing them in various publications and on his website.

Originally from Manchester England, Simon relocated to the United States in January, 2001. Since then, he's taken over 10,000 photos! Simon enjoys volunteering with the chapter and sees it as a way to extend his professional and personal network while keeping abreast of the latest project management related topics and issues. He is a great person to meet and loves to share personal anecdotes about project management, photography, sports (especially soccer or football), or travel.

When he is not answering the call of duty for PMI-OC, Simon works full time as a project manager at Toyota Motor Sales on the Integration Center of Excellence team. He enjoys the diversity of this role, as his team supports all Toyota business units in developing company-wide enterprise services.

Simon's previous work in various industries, such as retail, warehousing, distribution, finance, and manufacturing, has given him a solid set of professional experiences that he utilizes in his current position at TMS.

Thank you, Simon, for your valuable contributions to *Milestones* each month.

**Beth Williams, PMP**

**Information Technology:**  
[it@pmi-oc.org](mailto:it@pmi-oc.org)

### IT Volunteer

Design web pages, including graphics, animation, and functionality. Ensure consistency of web pages with approved style guide. In cooperation with content management, translate and implement content concepts. Advise IT director on website issues and improvements. Coordinate with Affiniscape for website support. Manage e-mail setups and address books.

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

### Advertising/Sponsorship Team Member

Need volunteers to contact potential advertisers and sponsors for *Milestones*, website, and other event sponsorships. Volunteers would send e-mail blasts, write letters, and make phone calls to potential and existing sponsors.

### Milestones Contributors

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

### Milestones Photographers

Need talented and creative individuals with an eye for style to take photos at chapter events for *Milestones*. Must have a digital camera and flash unit to take photos in indoor and outdoor venues. Will send photos electronically to *Milestones* editor and graphic designer.

### Marketing Website Page Design

Need a volunteer with experience in website page layout, using an existing website style guide. Dreamweaver and/or HTML knowledge and experience required. Ability to resize and color correct photos for the web using Photoshop, or other photo editing software. A third party content management system (CMS) will be used to lay out the pages. CMS training will be provided by the IT team.

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

### Technology Coordinator

The programs team is looking for a technician with an understanding of audio visual equipment. You will be setting up and storing PMI-OC equipment; including laptop, overhead projector, and sound equipment and will be responsible for storing and care of equipment. Time commitment is four to five hours monthly, including setup and breakdown at meetings.

### PowerPoint Coordinator

The programs team is looking for someone to create the PowerPoint presentations for the dinner meetings. You will be showing the presentation in addition to coordinating any other PowerPoint presentations from guest speakers, vendors, etc. Time commitment is six to seven hours monthly, including presence at the dinner meetings for the full duration.

# Marketing TEAM REPORT

## NEW MEMBERS

**THE 2008 PMI-OC MARKETING TEAM** had an incredibly successful year, thanks to the leadership of **Linda Keller, PMP** and her many volunteers. When I was given the opportunity to direct the PMI-OC Marketing Team for 2009, I knew I had my work cut out for me. Marketing is responsible for the promotion of all events, including the dinner meetings, career fair, ATS, and the PMP® prep courses. The team is also charged with “getting the word out” to the project management community about the benefits of PMI-OC membership and the various PMI® credentials.

To do that, we use several avenues to reach our target audience:

- **Milestones.** Every issue of the chapter’s monthly publication, *Milestones*, requires weeks of planning, writing, and proofing. A host of photographers contribute photos from all of our events. Volunteers sell advertising space. We have a paid professional graphic designer, **Jane Flynn**, who carefully lays out the pages and works with our advertisers to ensure their ads look great.

In December 2008, both **Roger Lew, PMP**, the *Milestones* editor from 2006-2008, and the assistant editor, **John Sunderson, PMP**, both elected to “retire.” And, lucky for us, **Bernice Maldonado** quickly stepped into the role and spent a few months in transition. She’s flying solo now and doing a great job. **Bill Georges, PMP** has volunteered to assist when Bernice is ready.

Last year the chapter chose to create and distribute *Milestones* in digital format (PDF). The current issue is always available for download from our website.

- **eNewsletter.** On Thursday evenings, we send out the latest news and event information to all members (who have not opted out), and the surrounding project management community. **Don Hitchcock** has volunteered to create the weekly newsletter and prepare it for final review and submission. If you are not receiving this newsletter and would like to, send an e-mail to [joinblast@pmi-oc.org](mailto:joinblast@pmi-oc.org).

- **PMI-OC Website.** Also in 2008, the chapter released a new website, with a members only area and fully functional online registration. All events are posted there, with information and links starting at the home page. **George Papich** updates the home page and also assists with other marketing related pages. There are probably 15 people who work on keeping the website up to date. Take a look at [www.pmi-oc.org](http://www.pmi-oc.org).

- **Corporate Outreach.** Marketing has a team of volunteers, lead by **Jennifer Murphy, PMP** who contacts corporations and other networking and user groups to notify them of our PMP workshops, PMI-OC Project of the Year, and our larger events. They also help promote PMI-OC at career fairs and other association events.

As a way to recognize project management in our community, the chapter offers a PMI-OC Project of the Year award (POY), and the marketing team runs that program. **Jose Alfredo Martinez**, this year’s POY coordinator, is looking for projects that were completed in 2008, used PMBOK® principles, and achieved the proposed goals of the project. Those goals included coming in under budget, on time, and maintaining high quality. The 2009 PMI-OC Project of the Year will be submitted for consideration for the 2009 PMI Global Project of the Year award. This year’s application deadline has been extended to February 23, 2009. See page 8, visit the website, or contact [poy@pmi-oc.org](mailto:poy@pmi-oc.org) if you are interested in submitting an application.

Marketing also is responsible for the revenue generation from advertising and sponsorship. **Tunde Deru, PMP** has stepped in to serve as liaison between the chapter and our generous advertisers and sponsors. There are many opportunities to support the chapter by advertising in *Milestones*, the website, and at our events.

Finally, **Caroline Jurado, PMP** and **Eileen Meinhardt, PMP** continue to coordinate our relationship with Lands End for the PMI-OC logowear.

It takes quite a few dedicated volunteers to support the chapter’s marketing efforts. We are always looking for additional volunteers to contribute to the team. If you are interested in assisting, please send an e-mail to [marketing@pmi-oc.org](mailto:marketing@pmi-oc.org).

**Lori Shapiro, PMP**  
Marketing Director



Noelle Afualo  
Gary Anderson  
William Aulwes  
Kent Becraft  
Cathy Brown  
Erin Carey  
Frank Carvajal  
May Chan  
Peter Chrapchynski  
Shashank Dhond  
Rhoneil Galicia  
Eddie Garcia  
Wollansa Habtu  
Ashwini Hassija  
Amos Herrera  
David Jamriska  
Michael Junge  
Eric McBride  
Daniel Nead  
D.W. Nesper  
David Nussdorfer  
James Olson  
Sunil Oza  
Vinay Patel  
Susan Pense  
Lalita Rangi  
Dan Robuck  
Jay Rollo  
Komal Shah  
Bahram Soroosh  
Derich Sukow  
John Vega  
Mary Williams  
Jean Yu  
Andrew Yuen

## NEW PMPs

Jocelyn Apple  
Carol Avellino  
Nathan Condie  
Daniel Cowan  
Kamran Darban  
James Gilkinson  
William Giovino  
Wollansa Habtu  
Glen Hackler  
Ryan Hart  
Amos Herrera  
Martha Luce  
Peter Milner  
Argelio Olivera  
Darin Rich  
Devender Sandhu  
Rene Simon  
Darcy Skaggs

# Portfolio Management

## Risk and Benefit Management Best Practices



**Presented by Chris Covey, PMP  
at the January 13 PMI-OC Dinner Meeting**

**Chris Covey** is a member of the Phoenix chapter of PMI®. As a project management practitioner, he has focused on scheduling and portfolio management and the evolving standards for both. Chris works for UMT Consulting, portfolio and project management specialists who worked on the standard for the portfolio management discipline.

Chris is energetic, articulate, and engaging. He didn't waffle on answers to questions, firing off answers with the same energy that drove his talk. Many of his slides tied together the disciplines of portfolio, program, and project management in an easily understood manner. He has made these slides available for posting by PMI-OC.

The two topics for the evening's presentation were (1) quantifying risk and (2) qualifying and quantifying benefits.

Chris used four examples/case studies to illustrate the topics.

The value in project management is what you hope to gain from doing a project, in realizing the project goal, in executing the project correctly. Program management addresses which projects bring the most value to the organization today. What is valued changes over time. The value in program management lies in selecting the best projects to execute. Portfolio management is rated on its ability to identify and maximize business value, whereas project management is rated on its ability to deliver and realize business value. Program management is more cradle-to-grave than project management. Chris illustrated this with a timeline of portfolio governance:

### **Create > Select > Plan > Manage**

The first two stages, *create* and *select*, usually occur before the project manager is involved. The first is the domain of portfolio management (define drivers, develop program, and project proposals/business cases). The second is the domain of program management (define and optimize program) and project management (initiation). The *create* stage is heavy with risk analysis. Benefit analysis becomes more important as you move to *plan*, then *manage*. You must overlay risk and benefit management over all three (portfolio, program, and project management). There

is high effort around risk in the beginning that decreases as you progress to *manage*. Benefits may not be obvious or clear at the beginning. Benefits realization is greater as you go. You must be collecting the appropriate data during the project and after its completion in order to assess the benefits. These benefits may be tangible, such as money, or non-tangible, such as satisfaction and morale.

### **CASE STUDY 1: Business Risk Estimation**

This is a case study for the *create* stage of governance. The client wanted highly predictable project timelines, so they spent time on applying added controls. They created and used a sizing and risk worksheet for project proposal before the planning phase that was filled out by the project managers. Eventually, they automated it. They categorized types of projects and what risks were more likely to be associated with each type of project and assigned default values to each risk. The default values sufficed until they had more data for the risk plan. They combined an early risk score based on standard values at ideation stage, then later combined it with risk assessment in the planning phase of the project to create a full risk management plan.

### **CASE STUDY 2: Selecting the Optimal Portfolio**

This is a case study for the *select* stage of governance. The client took every project and tried to do all of them. There were never enough resources. They didn't know which projects were actually still going forward. The solution was to make a PMO and an inventory of projects showing who requested them and what the project status was. They created a form that asked about risks and benefits to capture a simple business plan for each project. Filling out the portion on risks and benefits proved hard for the organization because they had never done this before. They had only looked at how much money they had in their budgets. The focus on improving portfolio management at this client was getting control of the number of projects going on at one time.

Continued on page 6

# Portfolio Management

Continued from page 5

## CASE STUDY 3: Project Portfolio Governance

This is a case study for the *plan* stage of governance. A New York pharmaceutical company hired a new CEO in 2005. His task was to develop a restructuring plan to save the company \$4 billion in four years. They had an existing \$1.5 billion/year budget that needed slashing.

Which projects aligned with the new CEO's strategy? To answer this, they collected impact statements for each project. Then they ranked them based on how well the statements aligned with the CEO's strategy. They used Microsoft Office Project Portfolio Server 2000 to model and get scores for each project. This was plotted as cost vs. strategic value. Projects weren't just plotted as dots. Each was a bubble, the size indicating benefits. The color of the bubble indicated risk. There was a major effort to introduce gatekeepers (portfolio managers), accountable to the CIO, who were responsible for certain projects.

## CASE STUDY 4: Managing a Balanced Portfolio

This is a case study for the *manage* stage of governance. A software company in Redmond, Washington needed a better way to coordinate projects in customer service and support. Benefit attainment was poor. They had ways to select projects. What they needed was to see that the project benefits actually happened. They needed a business case for every project. They started a new review cycle implemented at the highest level. Reviews were quarterly and looked at long range execution, i.e. six months to a year ahead. They used a *quad report* tool that included (1) customer service scores, (2) financials, (3) learning and growth, and (4) business processes.

This merged the key performance indicators of business with a review of projects. As the correct projects were chosen to be done, the performance report card for the business group improved. If performance was down, projects were reevaluated, and the projects best suited to turn performance around were selected. The big change was project measurement.

On a final note, Chris' recommendations for portfolio management are:

- Define risks and benefits.
- Scale time spent on business cases to the size and value of the project.
- Use risk and business value to select portfolio.
- Manage risks and estimate benefits in time phases/timeframes.
- Keep sponsors and management engaged.

Points taken from the Q&A session:

- From a life cycle perspective, portfolio review is iterative.
- Business organizations are making their own PMOs to manage their portfolios, and then report their results back to broader business for resources, funding, etc. These organizations are commonly resource constrained.
- Real projects last long enough that they may no longer align with strategy.

- Big, successful corporations put all projects in one pool for analysis/ They need a central repository for all of this information, a database for the corporation. They analyze this data and report back to the shareholders.
- To maintain sponsor and management engagement in a project after it is in the implementation phase, and thereafter, assign a sponsor to the life of the project. This is not the project manager. The sponsor must do the lessons learned and show that their projects were completed before they can get approval for another project.
- The people who do portfolio management usually have a PMP®. They may be vice presidents. Sometimes portfolio management is a part-time job for them or only part of their job.
- Portfolio managers are asked for business cases for all of the projects and impacts to the business. This requires more education of the business group requesting a project. The project manager comes on the scene later.

**Annemarie Wheeler, PMP**

## 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 and are pursuing a degree in project management.

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.

**June 1, 2009 is the application deadline for this scholarship.**

For more information, go to:

<http://www.pmi.org/pmief/scholarship/scholarship-lopinsky.asp>

# At the January Dinner Meeting



**Left to right:**  
**Brenda Ingham**  
**Diane Altwies, PMP**  
**Francisco Avalos**  
 PMI-OC Finance Director  
**Bernice Maldonado**  
*Milestones* Editor  
**Darcy Skaggs**  
**Max Ballarte**  
 New PMPs  
**Kasey Compton**  
**Mark Baldwin**  
 from Comsys  
**Terry Ehrhard**  
**Erika Flora**  
 from Creative Enterprise  
 Solutions (sponsor)  
**Bob Lambert**  
 from Powersteering  
 (sponsor)



**Right:**  
**2009 Board of Directors**  
**Sylvan Finestone, PMP**  
 Chair/President  
**Thomas Cutting, PMP**  
 Membership Director  
**Francisco Avalos**  
 Finance Director  
**Nora Goto, PMP**  
 Operations Director  
**Tariq Shaikh, PMP**  
 IT Director  
**Lori Shapiro, PMP**  
 Marketing Director  
**Derek Barraza, PMP**  
 Programs Director  
 Not pictured:  
**Stephen June, PMP**  
 Chair-Elect  
**Cornelius Fichtner, PMP**  
 Director at Large



## PMP Exam Questions

Test your knowledge on these sample questions.

The PMBOK® Guide, Fourth Edition, is now available for purchase through PMI®. The PMP® exam is scheduled to change to reflect the new edition on July 1, 2009. Core Performance Concepts will continue to provide its monthly questions for *Milestones* based on the PMBOK® Guide, Third Edition until May 2009. May's *Milestones* will reflect the PMBOK® Guide, Fourth Edition.

- All but one of the following tools and techniques are unique to managing projects.
  - Quality control
  - Work breakdown structures
  - Earned value analysis
  - Critical path analysis
- The primary purpose of the PMBOK® Guide is to identify that subset of the *Project Management Body of Knowledge* that is generally recognized as good practice. Identify means
  - the knowledge and practices described are applicable to most projects most of the time, and that there is widespread consensus about their value and usefulness.
  - to provide a general overview as opposed to an exhaustive description.
  - there is general agreement that the correct application of these skills, tools, and techniques can enhance the chances of success over a wide range of different projects.
  - use as a reference to settle lawsuits arising from cost overruns.
- A key output of "acquire project team" is
  - roles and responsibilities.
  - updates to the staffing management plan.
  - staffing management plan.
  - project organizational chart.
- A subcontractor has been delivering in a timely manner; however, the subcontractor and the field manager are in disagreement about the quality of the work being delivered. This disagreement has been going on for a week now, and there is no resolution in sight. The project manager should
  - have a quality audit performed on the deliverable.
  - meet with the field manager and subcontractor to work toward a quick resolution.
  - give them time to work it out.
  - believe the field manager because he or she is our team member.

Answers are on page 15.

# CALL FOR NOMINATIONS



## 2009 PROJECT OF THE YEAR

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

Nominated projects must

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

There are three levels of competition for the 2009 PMI Project of the Year.

### Preliminary (Chapter) Level:

POY nominations must be submitted to PMI-OC no later than **February 23, 2009\***. A PMI-OC panel of judges will select the chapter's nominee (PMI-OC POY), and the PMI-OC POY project manager will submit the nomination to PMI no later than the third week of March, 2009.

### Semi-Finalist Level:

A PMI panel of judges will select three semi-finalists from nominees submitted by individual PMI chapters. The three semi-finalists will be selected no later than the second week of May, 2009 and will be submitted for finalist judging no later than the first week of June, 2009.

### Finalist Level:

A final PMI panel of judges will select the 2009 PMI Project of the Year from the three semi-finalists. The recipient will be selected in mid July, 2009, and the award will be presented at the PMI Global Congress, North America, in October, 2009.

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

For chapter level details, visit [www.pmi-oc.org](http://www.pmi-oc.org), or e-mail [POY@pmi-oc.org](mailto:POY@pmi-oc.org).



### Deadline for Nominations:

*Preliminary chapter level submissions are due no later than February 23, 2009.\* They are to be submitted to PMI-Orange County Chapter.*

### Who Should Participate:

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

### Who Can Nominate:

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

*\*Extended submission date  
Click here for more information.*



The 2008 PMI Orange County Chapter Project of the Year was awarded to Edison SmartConnect™ Advanced Metering Infrastructure (AMI), Phase II. See June 2008 *Milestones*.

The 2008 PMI Project of the Year was awarded to Hatch Ltd. for its expansion of Quebec Iron and Titanium's (QIT) Upgraded Slag (UGS) plant in Sorel-Tracy, Quebec, Canada. The project was completed three months ahead of schedule and saved \$15 million. During the project, there were no lost time accidents in 525,000 hours worked.





# The Transpersonal Dimension in Organizations

Presented by Elizabeth Topp, Ph.D.

**On January 10, Dr. Elizabeth Topp presented the Transpersonal Dimension in Organizations: Full Utilization of the Human Being. Dr. Topp is the owner of Topp Coaching & Consulting, a company that designs customized solutions and training for organizations committed to employee health and wellness. She has a Ph.D. in transpersonal psychology and masters degrees in counseling psychology and holistic human development. Her office is in Santa Monica, California.**

**D**octor Topp introduced herself to the audience as a descendant of indentured servants from Denmark. Her ancestors lived their lives doing something all the time. As a small child, she cried each time she woke up, knowing that her parents would give her work to do that day. She claimed this “doing” work culture is still prevalent today in the United States.

Dr. Topp posited that professionals, project managers included, can accomplish more if they operate in the *being* side of the *doing* versus *being* spectrum, rather than when in the *doing* side. The being side is characterized by (1) relationships orientation, (2) abundant time, (3) organic rhythm, (4) quality of life issues, and is (4) subjective/internal. By contrast, the doing side has the following features: (1) task orientation, (2) measured/finite, (3) systematic, (4) accomplishment, and is (5) objective/external.

She hypothesized that operating in the *being* side, which is achieved by slowing down, allows one to know more, be more effective, and accomplish more. She said that by slowing down, we can go faster, and the resulting joy and health increase our effectiveness. Additionally, *being* enhances creativity and innovative thinking.

Dr. Topp presented her Presence Based Coaching (PBC) process, the practice of presence in relation to goal-directed activity. She defined presence as one’s quality of life relating to the here and now, or present moment. Her PBC process follows the cycle of SOAA: stop, observe, align, and allow.

SOAA involves stopping all activities to start the process, using mindfulness meditation to get presence, aligning one’s intention, and allowing resolution by responding in natural ways. She then presented an example of her coaching work, a six-week coaching program with a group of 14 participants. She documented outcomes related to participant changes in presence, or quality of relating to self, others, and work.

Dr. Topp frequently quoted the works of A. H. Maslow in her illustration of *being*. In 1962, Maslow published a book, *Toward a Psychology of Being*, where he established a theory of quality of life. He characterized the good life as the fulfillment of a hierarchy of needs. He believed we must develop our *beings* to be more spontaneous and active.

During the seminar, Dr. Topp led the attendees through guided relaxation techniques and Tai Chi exercises. She used a couple of Tibetan bells to pace the onset and exit of relaxation suggestions. The relaxation techniques (mindfulness meditation) she used are very similar to those used in initiating meditation and inducing hypnotic states. She suggested that daily relaxation exercises could reduce stress and enhance performance. Mindfulness, she explained, means living in the filled present. It is paying attention by sensing, listening, looking, and feeling.

She asked the audience to experience mindfulness by working with a partner in the training class. Each person would first tell a sad, stressful story and then relate a happy story to his or her partner. Everyone was asked to describe how he or she felt during each activity. Many participants reported noticeable changes in their bodies, i.e., tense feelings in certain parts, followed by relief and relaxation as the story shifts from sad to happy. Some participants reported work-related stressful scenarios for which there were no easy answers. The audience provided some suggestions to solve the problems presented in class.

Dr. Topp concluded the seminar by discussing flow. At peak performance, most star athletes are in a flow state; his or her mind and body are in synch, and they are fully aware of their surroundings. She said movements are almost automatic in the flow state.

In case anyone is interested in more in-depth practice and exploration of the material she presented on January 10, Dr. Topp has the following upcoming events:

- Three Day Management Training, March 19-21, 2009  
*The Art of Leadership*, Santa Monica, California
- Five Day Retreat for Artists and Business Leaders  
April 12-19, 2009  
*The Soul of Creativity*, Kona, Hawaii
- In2: IN Forum  
April 23-28, 2009  
*OurSpace, Bringing Progress In2 View*  
Canoga Park, California

**Dr. Dar Manarang, PMP**

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## PMI Orange County Chapter Announces Its 2009 Winter Course



# PMP EXAM PREPARATION WORKSHOP

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**The fourth edition of the PMBOK Guide was released in December 2008. On July 1, 2009, the PMP exam will change to reflect the new PMBOK Guide. PREPARE TO TAKE THE EXAM BEFORE IT CHANGES!**

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

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

January 31	February 21	March 7
February 7	February 28	March 14

**Where:** Brea

**Brea Civic Center**  
1 Civic Center Circle  
Birch St. & Randolph Ave.  
Brea, CA 92821

[Click to register for Brea](#)

Costa Mesa

**University of Phoenix**  
South Coast Learning Ctr.  
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.

- **PMI Member: \$750, at the door \$800**
- **Non Member: \$850, at the door \$950**
- **Corporate discounts are available. Go to [www.pmi-oc.org](http://www.pmi-oc.org) for details.**

Register at [www.pmi-oc.org](http://www.pmi-oc.org).

Information at [www.pmi-oc.org](http://www.pmi-oc.org), or e-mail [programs@pmi-oc.org](mailto:programs@pmi-oc.org).

**THE NEXT PMI-OC 2009 EXAM PREPARATION WORKSHOP WILL BEGIN AT THE END OF APRIL.**

**Special Offer for Referrals!** Refer a friend to PMI-OC's PMP Exam Prep Workshops and receive either a free dinner meeting or advanced topic seminar registration. That's a cost savings of up to \$45 and as many as four PDUs.

*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.*

# Two Generations of PMI-OC

Father and son, **Frank and Keith Reynolds**, offer unique perspectives on our chapter's beginnings and its growth over the years. Founding member Frank recalls working with "force of nature" **Kathy Sharman** and co-founders **Julie Wilson** and **John Bing**, and he remembers the long drives to the Los Angeles chapter meetings.

One day on the drive home from L.A., the group decided to start a local chapter in Orange County. They wanted to represent the new realities of project management and its application to information technology, not just construction and aerospace. Equally important was bringing more diversity and more women into PMI®, and Frank is proud that the newly founded chapter, PMI-OC, was both inclusive and innovative.

Frank served as program chair for two years, and he recalls lunches with speakers prior to dinner meetings as a way to learn more about their areas of expertise, as well as the start of a newsletter to "get the word out" about our chapter. PMI-OC started with 12 chapter meetings a year at a central location, and champagne to celebrate chapter milestones became a tradition.

When asked what stood out in his many years of experience with PMI-OC, Frank immediately says, "PMI is the most professional association I have been involved with." Frank is proud to be a project manager; he enjoys the company of other project managers, and he feels that project managers are "interesting and cosmopolitan people doing interesting things."



Frank reduced his project hours for health reasons, and when he did not have enough hours to re-qualify as a PMP®, he became interested in the CAPM® qualification. Frank is now known as "Mr. CAPM" in our chapter. He points out that the value of the CAPM qualification is not as a stepping stone to a PMP credential, but that it helps team members "work better in a project setting" and see the value of project management.

Frank offers so much to our chapter by being "delighted to volunteer in any capacity." He has served on the board of directors, always asks the first question at dinner meetings, and is currently rewriting the CAPM guide. He feels strongly that the same energy and ideals that started PMI-OC are still alive in the chapter today in our lively, dedicated volunteers who have made PMI-OC the most active chapter in the area.

In addition to being named a PMI-OC Fellow in 2006, Frank's proudest moment as a PMI-OC member was working with his son, Keith, for a year and a half. Keith is the youngest dinner meeting attendee in our history and attended his first meeting as a teenager with his father, where he met Kathy Sharman, Janice Preston, and John Bing. Admitting that he was "gently coerced" by Frank to attend that first meeting, Keith returned to PMI-OC after graduating from UCI in the mid-1990s.

Keith attended chapter meetings and was editor of *Milestones*. "We had a decent-sized mailing list, and I was exposed to managing a cost center. We sold ads, which helped subsidize the publication, printing, and mailing of the newsletter." Keith also served as program director and spoke to the chapter monthly. He discovered that the program fees were a "profit center for the chapter," and he is proud to be a part of the decision to use this profit to subsidize the cost of PMP certification preparation.

In 1999, Keith relocated to Washington, D.C. and lived "all over the country" and was unable to attend PMI-OC meetings. He has since returned to live and work in Los Angeles, but he makes it "a point to drive down to Orange County rather than attend the PMI-LA meetings." What started as a drive to Los Angeles has come full circle back to Orange County, and two generations of PMI-OC have proven invaluable to our chapter in the process.

Vinita Jha

February 18, 2009

## PMI-OC Orientation Meeting

### 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 PMI-OC Orientation Meeting.

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, February 18, 2009**

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**

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)  
or [click here to register](#)

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

#### Questions:

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



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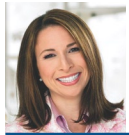
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**Register after February 28, 2009:** Please see individual cities for more information, early bird registration deadlines, and pricing after February 28, 2009.  
More info: 614-309-6565 and [www.ProjectManagementResourceGroup.com](http://www.ProjectManagementResourceGroup.com)

### Day 1 Speakers and Topics



**Genevieve Bos, Keynote**  
Owner and Co-Founder, PINK Magazine  
**TOPIC:** SECRETS and INSIGHTS from America's Most Successful Women in Business



**Patricia Shafer**  
President, Compel Organizational Excellence Alliance  
**TOPIC:** POWERFUL AND CONNECTED: A Half Day Interactive Workshop for Women Transforming Their Work Environment



**Sandra Yancey**  
Founder and CEO, eWomenNetwork  
**TOPIC:** RELATIONSHIP NETWORKING: The Core Components of Effective Networking



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### Day 2 Speakers and Topics



**Donna James, Keynote**  
Past President of Nationwide Strategic Investments – On the Board of CocaCola Enterprises and Limited Brands  
**TOPIC:** MENTORING: Maximizing the Value of Mentoring in Your Life and Career



**Shannon Cassidy**  
Executive Director, Bridge Between, Inc.  
**TOPIC:** POWERFUL NEGOTIATION: How Questions Lead to Solutions



**Margie Warrell**  
Executive and Life Coach – Author, *Find Your Courage*  
**TOPIC:** THINK BIGGER, LIVE BOLDER! Achieve Greater Success at Work and Beyond



**Jacqueline (Jacqui) Welch**  
Senior VP, Turner, a Division of TimeWarner  
**TOPIC:** SUCCESSION PLANNING: Living Into a Future That You Create

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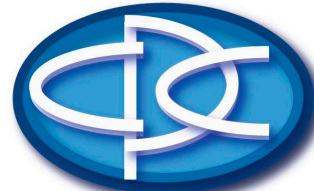


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February 7, 2009



## Project Management and Leadership

Understanding the Differences Between Leadership and Management

Presented by Mike Graupner, PMP and Dr. Daryl Watkins, PMP

Leadership is one of the most prominent aspects of the organizational framework. Successful leaders encourage and inspire others to excel and be the best. However, defining leadership can be demanding.

Mike Graupner and Dr. Daryl Watkins will share their knowledge and experience in this area. This seminar is designed for both the experienced and the emerging leader. Mike and Daryl will review leadership theory, traits and principles, and how they apply in a project. They will draw a clear line between management and leadership and develop a better understanding of the “whats” and “hows” of leadership.

In this seminar, participants will study and discuss organizational vs. situational leadership. This highly interactive session will allow participants to define their own leadership style.

Participants should be familiar with core concepts of leadership and be prepared to participate in discussions of their leadership experiences.

Mike Graupner, PMP, (pictured) 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:** Saturday, February 7, 2009, 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)
- Registration:** [Click here.](#)

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For more information, go to [www.pmi.org](http://www.pmi.org) or [click here for pricing and ordering.](#)

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## February 7 Advanced Topic Seminar

Mike Graupner and Dr. Daryl Watkins  
Project Management and Leadership  
See column at left.

## February 7 PMP® Exam Prep

Second session, two locations  
1. Brea Civic Center  
2. University of Phoenix, Costa Mesa  
See page 10 .

## February 10 Dinner Meeting

Steven Mauss  
Managing Change in a Flexible World  
See pages 1 and 16.

## February 18 PMI-OC Orientation

See page 11

## February 23 2009 PMI-OC POY

Extended Deadline for Nominations  
See page 8.

## March 7 Advanced Topic Seminar

Speaker and topic to be announced

## March 10 Dinner Meeting

Andy Anderson, PMP  
Project Management in 2051:  
Prepare for the Future

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

## Answers to PMP Exam Questions

From page 7

1. a. Quality control can also apply to operations.  
*PMBOK® Guide 2004, Chapter 1, Section 1.5*
2. b. To provide a general overview as opposed to an exhaustive description.  
*PMBOK® Guide 2004, Chapter 1, Section 1.1*
3. b. Updates to the staffing management plan. A, C, and D are all outputs of human resource planning.  
*PMBOK® Guide 2004, Chapter 9, Section 9.2.3.2*
4. b. Conflict management is a necessary general management skill. It is the project manager’s responsibility to facilitate these disagreements in hope of minimizing any project impact.  
*PMBOK® Guide 2004, Chapter 9, Section 9.4.2.3*

Sample exam questions submitted by:  
Diane Altwies, PMP, Core Performance Concepts, Inc.  
[www.coreperformanceconcepts.com](http://www.coreperformanceconcepts.com)

## PMI Orange County MILESTONES

February 2009, Volume 21, Number 2

**MILESTONES** is published monthly 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. Copyright 2009 PMI-OC, Inc.

Editor: **Bernice Maldonado**  
editor@pmi-oc.org

Advertising: milestones@pmi-oc.org

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

Inquiries: editor@pmi-oc.org  
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# PMI-OC Dinner Meeting

## Tuesday, February 10, 2009

Program: **Managing Change in a Flexible World**  
Steven Mauss

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

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

Cost: **Dinner and Presentation**

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

*\*Although the hotel prepares additional meals over our committed attendee count, walk-ins are not guaranteed dinner.*

**Featured Presentation Only** (Members and Non-Members)

*In Advance:* \$15.00 *At the Door:* \$15.00

Parking: **FREE!**

Please register at [www.pmi-oc.org](http://www.pmi-oc.org) or [click here to register](#).

You can pay by credit or bank card in advance or by cash, check, or credit card (Visa, MasterCard, American Express) at the door.

Make your reservation by 10:00 p.m. on Sunday, February 8, 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 10:00 p.m. on Sunday, February 8, or anyone who makes a reservation and does not attend, will not receive any refunds.



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