

# Milestones

March 2009

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

**March 10  
Dinner Meeting**

## PROJECT MANAGEMENT IN



# 2051

## Prepare for the Future

**Speaker:**  
**Andy Anderson, PMP**  
**Agile Leadership**

**Andy Anderson** has over 22 years of information technology experience and 15 years of experience as a project manager, with seven years as a PMP®. Andy has managed a variety of projects, including infrastructure solutions, software development, enterprise application implementations, process improvement, new product development, and supply chain management.

Andy has been working on PMI's standard committee for Organizational Project Management Maturity Model (OPM3) since 2002

In addition, to his membership in PMI®, Andy is a member of ASAPM, ISACA, and ASQ.

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

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## THE CHAIR'S COLUMN

Many of you may not realize that our 20th anniversary will occur in October. And I would suggest that even fewer of you know the story of the founding of our chapter.

Our PMI-OC Fellows include **Ed Walker, PMP; John Bing; Quentin Fleming; Marty Wartenberg; Frank Reynolds; Julie Wilson, PMP; Janice Preston, PMP; Dave Jacob; Kathy Sharman Melgar; Cyndi Snyder Stackpole, PMP; Adrienne Keane, PMP; and Kristine Hayes Munson, PMP.** Twenty years ago, several of these members were travelling to Los Angeles every month to attend the PMI-LA dinner meetings. It was on one of the nights when they were returning home that they decided to form a chapter in Orange County.

You have to admire their vision and fortitude as they saw the potential for an Orange County chapter to complement the large membership base of the Los Angeles chapter. They realized that there was a challenge in front of them as they met to establish a chapter, with all the steps that they would have to go through. (See related story on page 9.)

Of course, we started small, and there was some concern that we would never get this off the ground. We were competing against an established chapter with known programs and resources. But, we had advantages as well. Orange County is more compact than Los Angeles, and we have similar industries, although a somewhat smaller population. This made us more accessible to a very defined population and more able to focus the offerings.

Now, 20 years later we have eclipsed the Los Angeles chapter. We have more members and more PMPs. We also have a robust set of programs with our special speakers, advanced topic seminars, PMP® preparatory classes, and dinner meetings. And, we are planning to expand these programs in the very near future.

We need to look back on all the boards of directors and thank them for their dedicated service that made PMI-OC one of the strongest chapters in PMI® Region 7 and in PMI overall. We may not be the largest, but we are certainly one of the most robust and growing chapters, especially in Region 7 (California, Nevada, Arizona, New Mexico, and Hawaii). Certainly, our last board contributed greatly to this excellence with the outstanding continuing programs it provided.

Recently, it was my pleasure to present **Victoria Flanagan** with a crystal vase engraved to recognize not only her year as chair, but also her six years on the board of directors, serving as vice president of corporate relations, director at large, and chair-elect. Victoria continued the long tradition of service that has become synonymous with PMI-OC, and we cannot thank her enough for her volunteer efforts.

It is important to realize that we have many more volunteers who rightfully deserve recognition. We are currently looking at the volunteer of the year nominations. If you feel that you have a candidate whom the board should consider for this prestigious award, please forward your name to a board member who will be responsible for following up with the written nomination. We do want to make sure that we do not overlook anyone in the process. Even though we have a volunteer of the year designate, we also have other special recognitions available.



Continued on page 3

# Volunteer OF THE MONTH

F E B R U A R Y 2 0 0 9

## Volunteer Opportunities

### D'Shone Swiney

It did not take D'Shone very long to jump into action after joining the PMI-Orange County Chapter in 2008. She attended a PMI-OC Orientation Meeting and heard of a new volunteer position, programs communication coordinator, and signed up on the spot. D'Shone started working to improve communication between the program, marketing, membership, and IT teams. She worked with the various teams to create and document a process for disseminating information about events throughout the organization to ensure accurate and timely information flow among the different groups.

Volunteering is not new to D'Shone. She was a youth group leader for approximately ten years, a tutor for inner city youth for five years, worked with the United Way on various volunteer projects for over five years, and completed a half marathon to raise money and awareness for the Leukemia and Lymphoma Society. She finds that giving back to the community is very rewarding.

Currently, she has a project management contract with a bank in Dallas, which requires her to travel between Texas and California. Her team is busy developing a new loan servicing division for the bank. And, she has an extensive background as

a trainer and training manager. In addition, she is taking the PMI-OC PMP® Prep Workshop on the weekends and has volunteered as the student class coordinator. She plans to take the PMP exam soon after the class concludes.

D'Shone likes volunteering because "It makes me feel like I am leaving something positive behind so that others can receive the same benefits that I have been blessed with." She enjoys her involvement with our chapter. "From the very beginning, I have been welcomed and surrounded with positive attitudes and people reaching out to me to offer guidance, advice, and friendship. I thought I would be made to feel inferior because I did not have my PMP, but instead, I was made to feel like part of a very close family. I am amazed at the generosity, respect, and affinity that's been shared with me by the members of PMI-OC. I am very proud to be a part of such a great community."

And, D'Shone, we appreciate your hard work and dedication to the chapter. Congratulations and thank you.

**Beth Williams, PMP**  
Volunteer Coordinator

**Lori Shapiro, PMP**  
Marketing Director

### The Chair's Column Continued from page 2

We also need to recognize the chapter on its 20th anniversary. Our programs director, **Derek Barazza, PMP** is currently planning a special dinner meeting for September where we will commemorate the history and future of our chapter. Hopefully, we will have as many past board members at the meeting as possible, other key volunteers, and representatives from PMI Global.

I encourage all of you to block out this meeting as a special celebration of the growth, success, and future of our chapter as we move forward toward our 25th year celebration.

A few weeks ago I attended the advanced topic seminar presented by **Mike Graupner, PMP** and **Dr. Daryl Watkins, PMP** on the topic of project management and leadership. While we were not able to complete the presentation, **Judith Berman, PMP** was sufficiently agile to reschedule the March ATS to cover the second half of the presentation. The session is structured so that attending the first seminar is not mandatory, and the subject matter and presenters are excellent. It is a program that is both important and immediately beneficial to the attendees. I encourage you to participate if at all possible.

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

### 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 set-ups and address books.

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

#### Advertising/Sponsor 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.

#### 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.

#### Website Content Reviewer

Need a volunteer to examine the website pages each week for consistent messaging, pricing, and conformity to our style guide standards. Report typos, formatting problems, and other issues to responsible page owners (i.e., marketing, membership, etc.). The PMI-OC website is a valuable marketing tool, and accuracy and consistency are important.

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

#### Technology Coordinator

The programs team is looking for an audio visual technician to set up, store, and maintain PMI-OC equipment; including laptop, overhead projector, and sound 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.

## NEW MEMBERS

Lita Acosta  
Sanjay Agarwal  
Shirin Alipanah  
John Allwood  
John L.C. Bachofer  
Frances Bai  
Sharlane Bailey  
Alicia Bogardus  
Edward Bohn  
Mitra Boyd  
Brodie Brickey  
Jacinto Busquets  
Rajni Chawla  
Ernest Duncan  
Thomas Edelblute  
Dan Edwards  
Scott Fernandes  
Erika Flora  
Martin Fogel  
Mary Froissard  
Cara Gallegos  
Rey Genaldo  
Ketankumar Gohil  
Mark Grant  
Juan Guerrero  
Anil Gursahani  
Charles Gustin  
Linda Hansen  
Dianne Harwell  
Cheryl Hayes  
Benedict Jiou  
John King  
Kyle Knobloch  
Pramod Kommarreddy  
Kari Kraus  
Nathan Le  
Jose Macias  
Venkatesh Malini  
Rama Malladi  
Rocio Martinez  
Michae McSweeney  
Jacinta Mudd  
Russell Myers  
Sava Nedic  
Bradley Oatman  
Tamara Ocean  
Michelle Palmer-Hamilton

Srinivas Panganamamula  
Emma Piacentini  
Srinivas Rani  
Sang Rhee  
Lynn Riperti  
Gunjan Sharman  
Michelle Shauer  
Mahesh Singh  
Thomas Sippl  
Bing-Ji Situ  
Dorothy Soteriou  
William Spear  
Frank Steffen  
Shirley Stevenson  
Fortunato Strumbo  
Mark Tang  
Barbara Thurston  
Paul Tofanelli  
Lynn Van Bach  
Kevin Watson  
Qiong Xu  
Bhuvanewara Yakasiri  
Valori Zaffino

## NEW PMPs

Mark Cook  
Mary Froissard  
David Howard  
Harvey Kertland  
Farid Mohabbat  
Tamara Ocean  
Gunjan Sharman  
Teresa White  
Andrew Yuen



## Member Spotlight

**Chuck Messall**, a PMI-OC member for five years, is our spotlight member this month. Chuck is a long-time resident of Southern California after having lived in many parts of the United States, as well as internationally. Chuck currently works as a program manager for SafeNet Mykotronx in Torrance. The company offers many types of security encryption equipment for both commercial and government use.

Chuck was born in Bartlesville, Oklahoma, in the very same home where his mother was born. Much of Chuck's youth was spent moving from state to state, as well as a period of time in Turkey. You see, his family moved a lot, as his father was in the U.S. Army Corps of Engineers. Chuck learned the art of delegation from his father, and delegation has served him well throughout his career.

Much of Chuck's career has been as an electrical engineer at Rockwell. Chuck also worked for the NSA where he participated in a training session on procurement for technical personnel. Chuck believes this is one of the best training courses he has taken on procurement management. Chuck transitioned into program/project management in 1982 when his employer won several new projects in a short period of time. One of their project managers retired, and Chuck was asked to become the PM on a program where he had led the proposal. "It sounded like fun, like a big chessboard," so he agreed to take it on.

When asked, "What advice would you give someone entering the field of project management?" Chuck responded that it is absolutely necessary for one to maintain their integrity and honesty. As a project or program manager, you need to be willing to make the hard decisions and to be able to clearly communicate bad news, as well as good news, to project teams and stakeholders.

Chuck is proud of his ability to build teams. Creating project teams can be a challenge when working with many individuals who traditionally work on their own. Chuck explained that traditional sole contributors have a lot to contribute to a team (i.e. their experience, ways of thinking, hard-learned lessons), even if they are not comfortable as a mentor. They are often impatient with bureaucracy and administrivia, so minimizing that is one important way to make them more willing to be on a team. They also often have unconventional ways of doing or seeing things. If they really are star performers, there is usually a lot of value in their insights. Learning to be truly appreciative of the fact that their weird way of looking at things may be a major reason they are star performers, helps to integrate them into the team. Maybe it just comes down to being willing to spend a little time getting to know them and treating them as individuals.

Chuck was introduced to PMI® through a friend and colleague, Jerry Strong, who was also a long time member of the PMI-OC. Chuck uses CMMI and the PMBOK® as a framework for developing processes within companies where he has worked.

On the personal side, Chuck enjoys doing the *New York Times* crossword puzzles and reading science fiction and detective novels. He also enjoys playing bridge a few times a week with friends. To play bridge, Chuck says that you must be able to concentrate. To be good, you must be willing to plan, focus, and prioritize throughout several hands; it's not easy to maintain that high level of concentration throughout the series of games played in a single sitting.

Take a moment to say hello to Chuck at the next dinner meeting. He has some good stories about traveling through Morocco or can even give you some tips on how to play bridge.

**Celeste C. Collins, PMP**

# MANAGING CHANGE IN A FLEXIBLE WORLD

## February Dinner Meeting Review

**Steven Mauss**, (left), president and chief operating officer of Knowledge Relay, LLC, presented the February dinner meeting topic, “Managing Change in a Flexible World,” along with **Robert Liego**, (right) a project manager at Knowledge Relay specializing in change management.



Knowledge Relay is an operational business intelligence solutions provider, offering both products and services that help enterprises save time and money by increasing efficiency and effectiveness of business information gathering and visualization. They bring a unique “source-show-share” approach to data source neutral migration and distribution. Both Steven and Robert have participated in major IT change initiatives at large companies and use the experience they have gleaned over the years to help guide major organizations through comprehensive and effective change.

Knowledge Relay’s philosophy is that change is a good thing. When done well, change makes organizations stronger, not weaker. Steven stated that companies make major changes every three to five years. He then quoted Peter F. Drucker. “Everybody has accepted by now that change is unavoidable. But that still implies that change is like death and taxes; it should be postponed as long as possible, and no change would be vastly preferable. But in a period of upheaval, such as the one we are living in, change is the norm.”

Steven then challenged the audience with the fact that to implement effective change on any project, or in any organization, project managers must operate in both transactional (traditional) AND transformational (visionary) modes. He then credited Peter F. Drucker again, with the statement, “Company cultures are like country cultures. Never try to change one. Try, instead, to work with what you’ve got.”

Robert Liego discussed change management. Change management is an ongoing challenge. Several change management models address different aspects of change. Most theories focus on the organizational or executive level. Managing change is not a new concept. Nicolò di Bernardo Machiavelli wrote centuries ago, “There’s nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success than to take the lead in the introduction of a new order of things.”

Robert introduced two theories developed by Harvard Business School professors Michael Beer and Nitrin Nohria. “Theory E” focuses on change in terms of near-term economic improvement, and “Theory O” focuses on improvement in organizational capabilities.

Robert showed how combining concepts from “Theory E” and “Theory O” can produce a more effective change program than

using only one change theory. For example, “Theory E” would manage change from the top down, and “Theory O” would encourage participation from the bottom up. A combined and more effective approach would be to set direction from the top, while encouraging people below to participate.

John P. Kotter created an eight step change model:

1. Create urgency.
2. Form a powerful coalition.
3. Create a vision for change.
4. Communicate the vision.
5. Remove obstacles.
6. Create short term wins.
7. Build on the change.
8. Anchor the changes in corporate culture.

Steven and Robert then went over some examples of how project managers acting as transactional leaders differ from executives acting as transformational leaders.

### Project Managers

(transactional leaders)

### Executive Managers

(transformational leaders)

Are goal and strategy oriented	Are visionary and mission oriented
Bargain or contract for the exchange of effort/output for rewards to motivate	Use inspiration, charisma, and inherent excitement of the vision to motivate others
Stress and value rationality, limiting options and choices, problem solving	Are individually and developmentally oriented
Are day-to-day and operationally oriented	Look at problems in new ways
Accent established norms, values, cultures and beliefs	Stress and value intellectual ability problem exploration, experimentation
Are risk controllers	Are future and change oriented
	Question existing cultures, norms, values, and beliefs
	Are risk takers

A purely transactional management style makes it difficult to focus on the most costly, unpredictable and recalcitrant element of change: the human element. Michael Beer offers this six step process to effective, collaborative change management:

1. Commit to mobilization of change by means of joint diagnosis.
2. Develop a shared vision for organization.
3. Draw consensus, competence, and commitment to a shared vision.

Continued on page 6

Continued from page 5

4. Inform everyone about changes.
5. Establish formal policies to institutionalize the change.
6. Monitor and adjust change if necessary.

Steven and Robert suggested that we identify strengths and weaknesses of stakeholders and address them up front in our plan. These evaluations are best done on a collaborative basis between the functional manager and the project manager.

Change management is about continuous improvement. Collaboratively evaluate ALL resources (human and otherwise). Evaluate and change how we collect, analyze, and distribute granular data for all resources, taking into account the human barriers to change.

The goal is to find a new way to implement, monitor, and measure change at the transactional level where it is easier to make changes, while operating on the transformational level (where it is often the most difficult to implement).

In summary, we'd like to thank Steven Mauss and Robert Liego of Knowledge Relay for showing us that change is a good thing, but it has to be managed properly, and that by combining aspects of various change management approaches, a more "holistic" solution can be achieved.

Steven and Robert described effective change leadership as best achieved by combining transactional and transformational methods. They reminded us that the human element must be considered, and continuous improvement is the goal we are all working toward.

**Patty Tutor, PMP**

### Test your knowledge on these sample questions.

1. As a project manager in a fairly immature project environment, you performed a WBS exercise with the project team, but could not gain consensus on all the deliverables beyond the first 60 days of the project. You should:
  - a. Start work on the well-defined areas and push off discussions of the undefined areas until a subsequent phase of the project.
  - b. Reschedule a meeting to work through those discrepancies as soon as possible.
  - c. Go back to the sponsor to see if you can get an extension on the project schedule.
  - d. Start work on the areas that are defined, but wait until further clarification is provided by the customer or the team, and then revisit the WBS at an agreed upon point in the future.
2. In order to enhance planning and managing work on the project:
  - a. Produce a WBS at the highest level.
  - b. Lower levels of decomposition would be necessary.
  - c. Implement a work authorization system.
  - d. Making planning meetings open to everyone who has an interest.
3. Sample testing of a population should be used when testing the entire population would:
  - a. Be too expensive.
  - b. Take too many inspectors.
  - c. Show too many defects.
  - d. Be mutually exclusive.
4. A tool and technique of schedule control is:
  - a. The schedule management plan.
  - b. Progress reporting
  - c. Design of experiments.
  - d. Performance measurements.

Answers are on page 7.

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

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.**

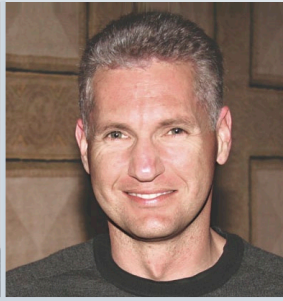
For more information, go to:  
<http://www.pmi.org/pmief/scholarship/scholarship-lopinsky.asp>

### PMBOK® Fourth Edition

The fourth edition of *A Guide to the Project Management Body of Knowledge (PMBOK®)* is available now.

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

# At the February Dinner Meeting



*Left:*  
**Angelio Olivera**  
New PMP®



*Above:*  
**Emma Piacentini, PMP**  
New member  
First time attendee

*Above:*  
**Sima Sharma**  
New member  
First time attendee

*Above:*  
**Alex Polishchuk**  
New member  
First time attendee

**Cara Gallegos**  
New member  
First time attendee

**Chau Tran**  
New member  
First time attendee



*Above:*  
**Michael Lim, PMP**  
From PMI Los Angeles  
Chapter

*Below:*  
Networking and socializing  
before the meeting



Photos on pages 2, 5, and 7 by **Greg Savage, PMP**

## PMP Exam Answers from page 6

**1. d. PMI® does not require that all the detail of the project be definable early on. The process of progressive elaboration and iterations is expected throughout the project life.**

*PMBOK® Guide 2004, Chapter 5, Section 5.3.2.2*

**2. b. Lower levels of decomposition would be necessary.**

*PMBOK® Guide 2004, Chapter 5, Section 5.3.2.2*

**3. a. Be too expensive.**

*PMBOK® Guide 2004, Chapter 9, Section 8.2.2.8*

**4. b. Progress reporting.**

*PMBOK® Guide 2004, Chapter 6, Section 6.6.2*



## FEBRUARY 7 ADVANCED TOPIC SEMINAR REVIEW

# Project Management and Leadership

On February 7, **Mike Graupner, PMP** (left) and **Dr. Daryl Watkins, PMP** (right) conducted a seminar titled “**Project Management and Leadership: Understanding the Differences.**”

Mike started the session by conducting an exercise. He asked the audience to stand up, turn around to face the back wall, and to repeat aloud whatever he said to them. He then told them that such blind obedience proved that “people want to follow a leader.” Not everyone agreed; one participant argued that Mike’s role as the seminar leader gave him power over the attendees, who were willing to follow his instructions.

Mike discussed the relationship between project management and leadership. He said project management focuses on tools and techniques for planning and execution, while leadership involves influencing people around you, as the project manager, to accomplish the goals of the project. Furthermore, he said that leadership gives you the ability to implement change without absolute authority.

During the seminar, presenters **Mike Graupner** and **Daryl Watkins** divided the audience into several groups of five. Each of these small groups elected a leader, discussed a topic, and reported their consensual views to the presenters and the audience. The groups first discussed and reported the relationship of leadership to project management. One common theme was that a project manager acts as leader and as manager at different times. Another theme was that as leader, a project manager is concerned with the effectiveness of his actions and decisions, while as manager, he focuses on efficiency in pursuing the project’s goals.

Daryl led the audience in defining leadership. Several differing definitions were suggested, from dictionary definitions to those given by known authors on leadership. Most defined leadership in terms of the leader, his or her traits, and some in common leadership theories. Daryl believes leadership is an environment in which a leader and followers exist. He also thinks a project manager is like a coin with two sides. One side is leader, and the other side is manager.

The personal traits of a leader, mentioned by the groups of five, are integrity, justice, dependability, decisiveness, courage, knowledge, initiative, and judgment. The presenters listed the eight most common leadership theories as “great man,” trait, contingency, situational, behavioral, participative, management, and relationship. Although not mentioned in the seminar, the concept of transformative leadership has recently gained popularity.

In a second exercise, each group was asked to define and recall a situation where a lie by a project manager was justified. Five groups reported one or two situations in which they could justify a lie by a project manager. Only one group reported a dissension in their majority view of a justified lie. Whatever happened to the leader trait of integrity and the PMI-OC pledge of ethical conduct? Can a lie ever be justified?

Mike and Daryl summarized the requirements for leadership as vision, movement, communication, influence, and followers. In addition, to be successful in project management, a leader must have a compelling vision, trust, and knowledge. A successful project manager must also be a good listener and be able to hear the experiences of his people.

Mike and Daryl concluded the seminar by discussing SWOT analysis. SWOT is an acronym for strengths, weaknesses, opportunities, and threats. The pair urged the audience to complete an individualized SWOT worksheet and mind map. They encouraged them to journal for one month how they are stepping up as a leader purposefully, not just reactively. The presenters and the audience were so enthralled with the subject that they agreed to continue the discussion and presentation into next month as Advanced Topic Seminar: Project Management and Leadership, Part 2. (See page 14.)

Mike Graupner is a project manager at Prescriptions Solution in Costa Mesa. Dr. Daryl Watkins is operations manager at VESystems, Transportation Corridor Services. Daryl has a Doctor of Management in Organizational Leadership degree from the University of Phoenix.

**Dr. Dar Manarang, PMP**

Photos by Louie Chanco, PMP





## Focus on Kathy Sharman Melgar



This month, our focus on PMI-OC founders leads us to **Kathy Sharman Melgar**, a true pioneer of our chapter.

It was Kathy's project at Pacific Mutual (now Pacific Life) that inspired the founding of PMI-OC. As a corporate project consultant, her role at Pacific Mutual was to create corporate level project standards, consult with project sponsors and project managers on best practices, and to monitor and advise the president on critical project progress.

Although the term "project office" was not yet in use, Kathy's role was similar. Since the area of project management was so new, she admitted feeling "in over her head" at first. A co-worker attending a class at UCI had heard about PMI's chapter in Los Angeles, and Kathy thought that attending a meeting of PMI-LA would help her gather the information she needed about this uncharted territory. She called co-worker **Julie Wilson**, and both headed to Los Angeles for their first PMI® meeting.

The meeting was held in El Segundo, with most of the members from Department of Defense companies, and few people recognized the need for IT project management within a financial institution. Fortunately, Kathy sat next to **John Bing** at this initial meeting. After chatting with John and a few other members, Kathy discovered that several of them were traveling from Orange County. The idea of forming a local chapter with fresh ideas was born, and Kathy contacted the PMI Regional Director to start a new chapter. Although six months pregnant at the time, Kathy began to put together a "telephone tree" of people who might be interested in an Orange County chapter. Kathy, John, Julie, Frank Reynolds, and others soon came up with an impressive list.

In its first and second years of existence, PMI-OC was selected as PMI Chapter of the Year! Kathy served as editor of *Milestones* for two years and as sponsor/president before the organization was chartered. She was the chapter's first president in 1989, and she was also asked to be a PMI trustee many years later. Kathy was named a PMI-OC Fellow, the chapter's highest honor, in 2007.

At Pacific Mutual, Kathy conducted a study of project management within the organization which revealed skill gaps. She then launched a program to train executives, business managers, and project managers in project management techniques and developed a guide for project sponsors. However, shortly after forming PMI-OC, the company president, who was the chief advocate of the project management initiative, retired, and Kathy changed jobs. Pacific Life later created a formal PMO.

Kathy explains that the concept of project management was used in many industries 20 years ago, but project management was not yet recognized as a career. These early days were the beginnings of today's project management environment, where PMP® certification is generally expected for employment as a project manager. Kathy believes that "PMI is a primary reason that project management is a profession." The greatest values of joining PMI-OC, according to Kathy, are available case studies for reference and learning, *Milestones* publications, speakers and presentations about specific projects and concepts, and the best value of all... networking. Thinking of her now grown daughter, with whom she was pregnant when founding our chapter, Kathy sums up her feelings by saying, "I can't believe it's been 20 years."

Vinita Jha

April 22, 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, April 22, 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

[Click here for map.](#)

#### 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.

#### Questions:

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

# WANT TO BE PMP CERTIFIED?

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

## PMI Orange County Chapter Announces Its 2009 Spring Course



# PMP EXAM PREPARATION WORKSHOP

**Six Saturdays Beginning April 4, 2009**

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.

**The fourth edition of the PMBOK Guide was released in December 2008. At the end of June, 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.

April 4	April 25	May 9
April 18	May 2	May 16

**Where:** Brea

**Brea Civic & Cultural Center**  
1 Civic Center Circle  
Birch St. and Randolph Ave.  
Brea, CA 92821  
[Click here to register.](#)

Costa Mesa

**University of Phoenix**  
South Coast Learning Center  
150 Bristol Street  
Costa Mesa, CA 92626  
[Click here to register.](#)

**This is the last PMP Exam Workshop before the exam changes at the end of June!**

Note: PMP Exam Workshop costs will increase with the fall course.

**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-OC 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.**

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

**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.*



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April 27 – 29, 2009

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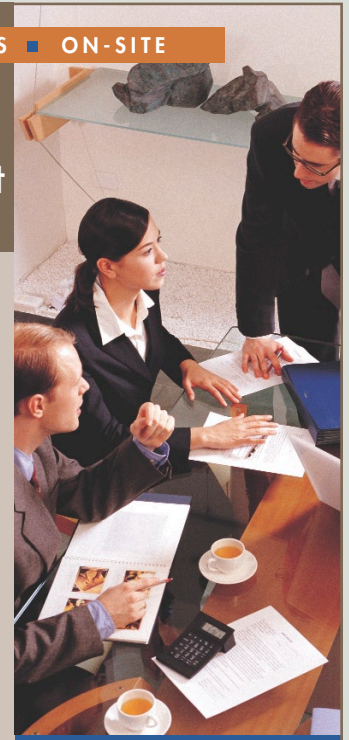
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**Dallas, TX** November 11-12, 2009

Register early . . . seats are limited.

Please see individual cities for pricing information.,  
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



**EVENING NETWORKING SOCIAL EVENT**  
5:30 to 8:00 p.m. Hors d'oeuvres and Cash Bar  
**7.5 PDUs per day**

### 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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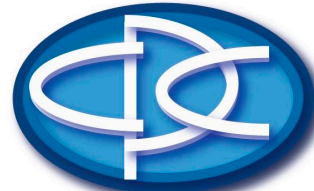


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March 7, 2009

## Project Management and Leadership

### **PART 2** Understanding the Differences Between Leadership and Management

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

Much has been written about leadership. This seminar addresses common myths and facts about leadership in a project.

#### **Seminar Objective:**

At the conclusion of this seminar, the participant will have a firm understanding of the difference between leadership and management and know how to apply leadership in the day-to-day execution of a project.

These sessions are designed for both the experienced and the emerging leader. We will review leadership theory, traits and principles and how they apply in a project. We will draw a clear line between management and leadership and develop a better understanding of the “whats” and “hows” of leadership.

Attendees should be familiar with core concepts of leadership and be prepared to participate in discussions of their leadership experiences. Participants may also bring a thumb drive if they wish to download the presentation and additional material (approximately 30 MB).

#### **Agenda:**

- Review of leadership definition and theories
- Fourteen leadership traits and how to measure them
- Leadership principles and how to apply them
- Leadership self improvement
  - Self assessment
  - Leadership journals
- Developing project specific leadership skills
- Developing leaders on your project team



**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, March 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.](#)

### **March 7 Advanced Topic Seminar**

**Mike Graupner and Dr. Daryl Watkins**  
Project Management and Leadership  
Part 2

See column at left.

### **March 10 Dinner Meeting**

**Andy Anderson, PMP**  
Project Management in 2051:  
Prepare for the Future  
See pages 1 and 15.

### **April 4 PMP® Exam Prep**

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

### **April 4 Advanced Topic Seminar**

**Adrienne Keane, PMP, PMI-OC Fellow**  
Creating Positive Project Teams

### **April 14 Dinner Meeting**

**John Stenbeck, PMP**  
The Five Time-Tested Keys of Estimating that Successful Project Managers Can't Live Without!

Don't miss sell-out hit first presented at the 2008 PMI Global North America Congress. [Click here to register.](#)

### **April 22 PMI-OC Orientation**

See page 9 or [click here to register.](#)

### **May 2 Advanced Topic Seminar**

**Mike Graupner, PMP**  
MS Project, Part 3

### **May 12 Dinner Meeting**

Speaker and topic to be announced.

### **June 6 Advanced Topic Seminar**

**Janice Preston, PMP, PMI-OC Fellow**  
Project Procurement Management

### **June 9 Dinner Meeting**

Speaker and topic to be announced.

**4th Annual PMI-OC Career Fair**  
Watch for details.

### **July 11 Advanced Topic Seminar**

**Diane Altwies, PMP**  
Business Analysis Essentials for PMs

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

## PMI Orange County MILESTONES

March 2009, Volume 21, Number 3

**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.

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# PMI-OC Dinner Meeting

## Tuesday, March 10, 2009

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

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, March 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, March 8, or anyone who makes a reservation and does not attend, will not receive any refunds.



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Orange County Chapter, Inc.  
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