

www.pmi-oc.org

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Diane Altwies



Sylvan Finestone



Nora Goto



2012 PMI ORANGE COUNTY CHAPTER

FELLOWS

Story on pages 3 and 4.

2012 Board of Governors

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President

Robbin Thomas
VP of Operations

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Annual Survey Completed

Thank you to all the members who completed our annual survey. As mentioned in a previous president's message, our main purpose

was to learn more about how we can better serve our members by restructuring the questions. We received 50 percent more responses this year. Two thirds of you provided very valuable additional comments, which we are studying as input to our strategic planning. Here are a few take-aways. Work, travel, and family time are major considerations when deciding to participate in an event.

- Geography of members' residences perhaps indicates that events are needed in other locations.
- Thanks for the "good job" feedback.
- Increase use of webinar resources accessed from www.pmi-oc.org.
- Programs oriented to younger professionals entering the project management profession.
- A number of suggestions for improvement that our directors and governors will consider.
- Improve communications to and from the BOG.

Please contact either me or the BOG with any additional input. E-mail President@pmi-oc.org or BOG@pmi-oc.org or both with any questions or input. We do occasionally miss an e-mail because of spam filters and the volume of messages, so be very descriptive in your subject line and minimize use of special characters.

Status of Investment Initiatives

The budget for PMI OC's 2012-2013 fiscal year incorporates several infrastructure investments that are expected to expend \$19K of our reserves over and above our normal revenue and expenses. This represents less than a ten percent use of our reserves. We will report our full financial status in the next issue, as we will have then completed reviewing the first nine months of our fiscal year that ends March 31, 2013.

New Website

We are up and running with the transition of all our functions and features of the old site and have incorporated some of the additional features in the registrations and events modules.

We have corrected some bugs and are in the process of cleaning up other punch list items and preparing scope for Phase 2. This phase will take advantage of content management tools and other features to improve communication and provide other beneficial features for our membership and our PM community

Membership Management System

Our membership team led by Lisa Hazelton has implemented a cloud based tool to manage our volunteer needs and resources. Open positions are listed on PMI-OC.org and you can contact volunteerchair@pmi-oc.org with any questions or interest in serving. If you have a special skill, but do not see a position that fits, still contact us. We always can find a way for you to assist without even needing to attend events.

Greg Scott, President

Selection Criteria

- Sustained service to PMI-OC and to PMI
- Led or had major participation in one or more significant projects for PMI-OC and/or PMI
- Development and/or delivery of project management presentations and training for PMI-OC and/or PMI
- Created and/or published information useful to project managers in their professional practice
- Sustained service to other institutions that further the interests of the project management profession

PMI-OC Fellows

- 2004** Edward Walker
- 2005** John Bing (*deceased*)
Quentin Fleming
Martin Wartenberg
- 2006** Janice Preston
Frank Reynolds
Julie Wilson
- 2007** David Jacob
Kathy Sharman
Cyndi Snyder
- 2008** Adrienne Keane
Kristine Munson
- 2009** Frank Parth
- 2010** Cornelius Fichtner
Warren Nogaki
- 2011** Michael Graupner
Robert Pettis



Diane Altwies, PMP

Diane has made many contributions to the field of project management.

She began volunteering for PMI-OC in the early 2000s and was marketing director when PMI-OC was named Chapter of the Year in 2005.

As marketing director, Diane applied very creative approaches. She developed the fall project management conference that continues today. Attendance exceeded 300, and the CEO of PMI Global was a major speaker.

Diane helped the chapter upgrade its training materials for the PMP exam prep course and trained volunteer instructors in the Orange County, LA, Inland Empire, and Santa Barbara chapters to teach prep courses.

Diane develops and delivers numerous project

Continued on page 4



Sylvan Finestone, PMP

From 2005 until the present, Sylvan has been actively involved in PMI-OC as president, membership director, volunteer coordinator, and project lead of PMInAction.

Sylvan led many advances in chapter growth. He attended the PMI Global Master Class for future leaders and brought global thinking to the chapter and region.

Sylvan's greatest effort as president was to change the bylaws of the chapter into a strategic board, with tactical leadership at the director level.

This change created opportunities for more members to lead as directors and made room for many other volunteers.

Sylvan worked extensively with directors and project leads to mentor them in their jobs.

Continued on page 4



Nora Goto, PMP

Nora has been named a PMI-OC Fellow for her sustained service to the chapter.

Nora has served as vice president of communications, vice president of administration, and operations director.

While Nora often kept a low profile and worked behind the scenes, she made many contributions that benefited PMI-OC.

Nora started the business process unit to document policies and procedures. When she discovered that chapter knowledge walked out the door when the volunteer left, she developed a central electronic storage repository of chapter documentation through Prolific, a project-centric software tool. This became the PM-OC version of organizational process assets.

Continued on page 4

2012 PMI Orange County Chapter Fellows

Diane Altwies

management presentations. She also discusses networking skills at the bi-monthly new member orientation sessions and has conducted highly regarded seminars at the monthly ATS sessions.

Diane teaches in the project management programs at UCI, University of South Florida, and Stetson University, where she is consistently rated as a top instructor.

Diane has spoken at the PMI Global Congress and numerous PMI chapters and professional associations throughout the U.S. She has written several PMI exam preparation textbooks, including the best-selling *Achieve PMP® Exam Success* and *Achieve CAPM® Exam Success*. She is the chief executive officer of Core Performance Concepts, Inc., a training and consulting firm and a PMI R.E.P. since 2002.

Diane believes in the power of volunteering to help others build their skills and to give back to the profession. She says, "My experiences with PMI-OC have helped me reach a new level of professionalism. Even better, are the fantastic people who have become my friends and colleagues."

Sylvan Finestone

Sylvan also established a permanent endowment from PMI-OC to the PMI Educational Foundation. In 2009, Sylvan was instrumental in planning and executing the PMI-OC 20th anniversary gala event. Over 250 people were present.

As the membership director, Sylvan led and coordinated many activities to benefit the members. He reorganized volunteer recruitment and the member surveys. He completely reinvigorated the ambassador program. He reworked the new member orientation program to make the presentation more dynamic and introduced networking skills as an important topic. He helped establish a formal process to recognize the Volunteer of the Month and Volunteer of the Year.

Throughout his tenure with PMI, Sylvan always managed to find time to teach in the PMP exam prep class and to improve marketing of the program.

Sylvan never waited for someone to ask him to volunteer. He sought out opportunities to contribute to PMI-OC and actively pushed his efforts for lasting benefits for the chapter.

Nora Goto

Nora also introduced the chapter to a Webex conference line where officers and other volunteers could meet. This streamlined the meeting process and improved communication among volunteers.

Nora took board meeting minutes for many years. She attended every new member orientation session and directly recruited and mentored Dave Cornelius, Robbin MacKenzie Thomas, Diana Wei, and Cindy Pham as volunteers. These individuals have become important contributors to PMI-OC.

Nora started the chapter's social media groups on Facebook and LinkedIn and started the technology to make the *Milestones* publication available in digital format on ISSUU.com.

Nora is a project manager for VA Healthcare. She credits volunteering with PMI-OC with helping her understand and build skills to get things done by developing relationships among diverse personalities. Nora enjoys working with the other terrific volunteers and feels a real sense of accomplishment for the work she has done for PMI-OC.



The 2012 PM-OC Fellowships were awarded at the January 8 dinner meeting, PMI-OC Fellows, *left to right*: Michael Graupner, 2011; Kristine Munson, 2008; Nora Goto, 2012; Diane Altwies, 2012; Janice Preston, 2006; Frank Rynolds, 2006.

Unfortunately, 2012 PMI-OC Fellow Sylvan Finestone was unable to attend.

Nora and Diane "compare" awards.

2012 PM-OC Fellows profiles
by Janice Preston

Leading Without Authority

A career in project management guarantees that you will be placed in a position responsible for outcomes, often without any formal authority, and sometimes on a team with weaknesses. You may have seen some projects like this. Do you know how to make them successful? What do you do first, even if you aren't the formal leader?

Teams have always needed management and leadership to succeed. Many of us can recall working on teams that produced great results and gave us great personal and professional satisfaction, as well as working on teams that failed.

We sometimes serve on teams that do not seem to be led at all and become disillusioned. As we move forward in our careers, we recognize that we need skills to deliver great results and create great teams, but we don't know where to get them or even what they are!

Gregg Oliver is the principal at Pathfinder Communication, an influence and communication training firm in San Diego.



Gregg teaches concepts and specific techniques for conducting productive conversations and for influencing, developing, and maintaining amazing business relationships.

Gregg has worked as an individual contributor and manager in engineering and manufacturing businesses for over 35 years. He also authors the weekly newsletter, "High Performance Communication."

[Click here to register.](#)

Lean Project Management

Lean principles can be easily applied by individuals, teams, groups, departments, and organizations to eliminate non-value



added tasks and waste to improve efficiency and strategic throughput while enhancing customer value.

Joe Brannon is a management consultant, entrepreneur, strategic thinker, and educator with 15 years of experience assisting corporations in realizing positive results through lean thinking, project management, and strategic throughput.

Joe also teaches at leading private and state-supported education institutions, including the University of California Irvine.

[Click here to register.](#)

Mobile Marketing

COMMUNICATION TOOLS FOR TODAY'S INNOVATIVE PROJECT MANAGERS

Hank Mondaca from Sonic Mobile gave a very interesting presentation to kick off the chapter's first dinner meeting in 2013. Hank explained how society is using cell phones more today than they were a few years ago and how that has changed business marketing.

Hank caught our attention by showing an exciting video that followed the dramatic evolution of the cellular industry.

He asked everyone in the audience with a smart phone to raise their hands. **OF COURSE, EVERYONE DID!** A few people had two smart phones, and one person even had three.

Hank used trade shows as an example. Rather than have people throw business cards in a bowl like some vendors do, one company asked everyone who came by their booth to text them to enter a drawing for a prize.

Later, everyone who had texted the vendor was texted back asking them to come back for the drawing of the prize. Soon a large gathering was surrounding that booth, which created a "buzz."

At the conclusion of the show, the attendees were texted back thanking them for participating.

This approach was innovative, interactive with the consumer, and the company now had contact information with the consumers, including their cell phone numbers.

While companies continue to market through the Internet with pay per click and other methods, Hank stressed how more and more companies are getting into this more efficient way of reaching their customers.

Like the trade show example, Hank also used a blend of "call to action" with the cell technology. He asked everyone to text "hank" to a number which then led people to his website. This, of course, is a useful tool for generating leads.

Hank stressed the importance of staying ahead, or at least "with," today's technology. Those



who don't embrace the newer technology get left behind.

How many people are flipping through thick yellow pages anymore? It's hard to sell advertising in a yellow pages book if no one is using this medium. Today's communications are through the internet and cellular phones. Knowing that can be key to keeping in touch with consumers through mobile technology.

Mobile technology can also add value for purposes other than marketing. Hank gave an example of a dental office that sends out appointment reminders to patients, who confirm the appointment with the touch of a key on their cell phones.

Mobile technology is an important tool for companies to use in obtaining and maintaining their relationships with customers. Hank's impressive presentation drove the point home.

Len Stregles

At the January 8 Dinner Meeting



Left to right:
Checking in.
2012 Fellowship Awards.

Bernd Steinebrunner from MetLife, the chapter's platinum sponsor.

Dinner.

Bryan Forte, Bernd Steinebrunner, Dave Cornelius, and Craig Wilson share a joke.

New PMPs

First time attendees

Membership Director Raghu Kuppannan presented the Volunteer of Merit Award to Vanessa Yieh for her long term support of the BOG, as well as her dedication to the social media team.



Photos on pages 4, 6, and 7 by Steve Goto.

HOW TO MANAGE Stakeholder Expectations



Janice Preston

is chief operating officer of Core Performance Concepts. Her presentation on managing stakeholder expectations included the following objectives.

- Identify the key stakeholders.
- Develop a power and interest matrix to analyze stakeholders.
- Assess communication styles.

Janice set the tone by presenting the outline of the class and what was to be expected. As an icebreaker, attendees then introduced themselves.



Stakeholders were identified as anyone who can impact the project or can be impacted by the project. Janice named a variety of stakeholders as examples, including project sponsor, senior

management, customer, vendors, functional or resources managers, and subject matter experts.

One of the group projects was to assign stakeholders in an organization to a power and interest matrix. This helps a project manager understand what level of power and interest different stakeholders might have and how that will affect the project.

The power and interest matrix also leads into stakeholder management planning. Janice explained that power can either positively or negatively impact a project. Those with the most power are the project sponsors.

Janice continued the classroom discussion on how to manage stakeholders based on where they fell within the power and interest matrix, The more power and interest a stakeholder holds, the more interaction a stakeholder is going to require throughout the project. Some stakeholders, such as human resources and training, will require only intermittent interaction, as Janice explained through a group project and discussion.

What was also particularly interesting was Janice's discussion

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Continued

Stakeholder Expectations

of behavior styles and how to communicate with stakeholders displaying particular styles.

According to Janice, there are four behavior styles: relator, socializer, director, and thinker. Relators are nurturers like nurses.



giving great attention to numbers and facts.

The attendees discussed the different styles and how to best communicate with people possessing them.



a good example of a project manager understanding the needs of people with different behavior styles.

As another example, the group discussed dealing with the director or thinker, who must be very direct and to the point, as they are more focused on the details of the project.

What was particularly good about the presentation was that everyone paid ample attention to practical exercises. There was good interaction within the groups, creating short brainstorming sessions. After each exercise, the groups would present what they had come up with in response to Janice's instructions.



Socializers are usually people in sales because they like to spend time developing personal relationships. Directors are more task oriented, leaving little time to discuss personal matters. Thinkers are analytical in nature,

As an anecdote, Janice talked about a female project manager who would always start her teleconferences with a joke or a personal story about her family. This approach was to satisfy the socializer stakeholder. This is

Review by
Len Stregles

Photos by
Jack Roth, PMP
www.seesthemoments.com

Software Management Consultants, Inc. (SMCI)

is teaming with PMI-OC to offer a "Job Search Strategies/Skills Profiling" workshop.

As technology has replaced face to face meetings, and in many ways has restricted job searches to something very impersonal, it has become extremely important to "get outside the box."

This workshop will present ideas and strategies about job searches in today's market. From utilizing the technologies and platforms available to you as a candidate, viewing your resume like a potential employer, developing tools to better profile your value, to interviewing, this workshop's objective is to inspire creativity and purpose in your search.

Weaving together resources and experience from both organizations, the workshop is developed in a "project" format where attendees will create and track job search progress. The topics covered will be job search tools/strategies, resumes, portfolios, quantifying your achievements, and interviewing.

As this is a pilot workshop, the available seats are limited to PMI-OC members, and there is no cost to attend. We do ask that you ensure you can attend each workshop. We will be putting into action what we are learning, and should you miss a session, you will miss necessary building blocks.

Tammy Hawkins, VP Business Development at SMCI brings over 20 years experience in the IT staffing and placement industry. She has been in the Orange County market since 1999 and has held numerous roles within the industry, such as consulting services manager, sales manager, and managing director. Her desire to help folks find jobs falls outside of her day to day responsibilities in her company. She volunteers with several industry organizations, and works with many candidates one on one in their job search.

New! Career Workshop Series

February 16 Session 01:

"Strategic Job Search Strategies"

1. Learn to use internet intel for conducting purposeful and strategic job searches.
2. Learn to create a portfolio. Progressively add accomplishments to your portfolio throughout the workshop program.
3. Create a job search "project" tracking plan during session.

March 02 Session 02:

"Interactive Resume Workshop"

1. Work on resume enhancements during session utilizing the prior week's outcomes.
2. Receive resume feedback,
3. Continue adding accomplishment to your portfolio.
4. Update project tracking plan.

March 16 Session 03:

"Quantify Career Achievements"

1. Learn to quantify accomplishments for resume and interview.

2. Develop several accomplishment statements and practice during the session.
3. Continue working on portfolio.
4. Update project tracking plan.

March 30 Session 04:

"Interview Techniques /Q & A/ Program Wrap Up"

1. Learn interview techniques.
 2. Conduct interviews during the session.
 3. Bring workshop deliverables: updated resume, quantified accomplishments, project plan, and completed portfolio.
 4. Q&A/program wrap up.
- Learn how to build and heighten your career. Join us for a strategic project approach to job search.

Meeting Location:

Work Is Good, Meeting Space
2082 Business Center Drive #250
Irvine, CA 92612

Time: 9:00 am to 12 noon

RSVP:

Open to PMI-OC members only

Maximum attendees: 21

Cost: Free

Bring your laptop to each session.

Career Workshop Series Team

PMI-OC project sponsor:

Robbin Mackenzie Thomas

VP Operations

PMI-OC Project Chair:

Jerome Reilly

SMCI Recruiter:

Tammy Hawkins

[Click here for more details and to register.](#)



Linking Talent for Success.

PMI-OC is excited to introduce its very first mentoring program set to launch in this first quarter.

The program's mission is to offer chapter members an opportunity to apply their knowledge, expertise, and professionalism as a mentor, or leverage a knowledge base of PMI-OC's best resources as a mentee.

The program will offer a multitude of benefits for both mentors and mentees alike. Mentors will enjoy assisting an up and coming or a seasoned, ready to turn senior professional expand their profession. Mentees will take advantage of gaining valued insight that they can utilize throughout the life of their careers.

Mentors and mentees will be carefully matched based upon information in their applications.

Participants of the mentoring program will receive a number of PDUs upon following the necessary program guidelines and completion of the program.

It is our aim for the mentoring program to be well received throughout the PMI-OC community and become a strong, long standing resource for the chapter.

We are currently accepting applications for mentors and mentees. Those interested in learning more about the program can [click here](#) to visit our website.

Applicants can also go to our website to begin the application process.

[Please like us on Facebook](#)

Follow us on
Twitter@PMIOCMentor

You can also [read our blog](#) and learn more about how the program is forming.

The mentoring program includes hosting an icebreaker that will not only be fun and educational, but will also let mentors and mentees meet for the first time and begin their partnership.

There will also be a mid-program event and a close out event to present certificates and conclude the program.

Thank you for your support.

**The PMI-OC
Operations Committee
Mentoring Program Team**

Written by
Darvin Thompson

New Director of Programs

Please Join us in welcoming



Mike Sanders

to the PMI-OC operations team as the new director of programs.

Mike is a technical training manager at Southern California Edison and past president of the PMI Inland Empire Chapter. He also managed the Project Manager Center of Excellence Training Program in partnership with UCI.

Mike has over 15 years of experience in technical management. He has also taught and trained at universities, colleges, and corporations and is a popular public speaker. Mike has been a frequent guest speaker at PMI-OC. "Multitasking" is one of his favorite topics,

Mike is a PMP and recently became a PMI-OC member.

Please be sure to introduce yourself and say hello to Mike at the next dinner meeting.



The Agile PM

Bachan Anand

The Joy of Doing

Are you among those, or do you know someone, who spends an entire day making beautiful to do lists, and talking about achieving outstanding results, without really doing anything, and ending up with very little done from the to do list?

A certain amount of planning is justified, but have you observed where the real Joy comes from?

[Click here for the answer!](#)

Scholarship Available

Each year, PMI-OC sponsors a \$3,000 scholarship in memory of Charles Lopinsky, PMP, PMI Fellow. This scholarship is awarded through the PMI® Educational Foundation and is open to students who are Orange County residents pursuing an undergraduate or advanced degree in project management.

[Click here for application.](#)
Deadline is June 1, 2013.

Volunteer Opportunities

Photographers and Writers for Monthly Dinner Meetings

We need photographers and writers to cover the PMI-OC dinner meetings at the Wyndham Hotel in Costa Mesa on the second Tuesday of each month.

Photos and articles will be published in *Milestones* and may be distributed to social media and other marketing channels.

Photographers: Need high resolution digital camera equipment for indoor candid images, guest speakers, special awards, and other activities.

Writers: Clear, concise, and entertaining style to report speaker presentations and other events at the meeting.

Schedule: You will need to arrive at the Wyndham no later than 6:30 pm.

Benefits: Dinner and PDUs

Please contact Lisa Hazelton, lhazelton@mac.com or jane-flynn@charter.net.

For other current volunteer opportunities, [please click here](#) or contact Volunteer Coordinator Lisa Hazelton, lhazelton@mac.com.

New Members

Marca Atencio
 Jeff Bennett
 Sandeep Bhavsar
 Dick Bridges
 Jeffery Buckner
 Michae Buzard
 Milosh Cerevka
 Dave Conlon
 Melissa Erickson
 Ingalsbe
 Gina Healey
 Ryan Hervey
 Ekaterina Ivashuta
 Tyler Iwamoto
 Eric Jackson
 Zetulio Jimenez
 Ramanpreet Juneja
 Sherice Kennedy
 Gerrit Klaschke
 Nitin Manelkar
 Miche McKeehan
 Dan Molloy
 Ney Moscati
 Frank Norton
 Jason Perez
 Tanja Peterson
 Scott Pettit
 Emily Piland
 Christopher Pizula
 Matthieu Roussillon
 John Simenton
 Salim Sioufi
 Janice Stapler
 Ronald Stein
 Godwin Terah

Neil Thompson
 Patricia Toche
 Joey Trama
 David Tsou
 Michael Withers
 Ehsan Yaghmaei

New PMPs

Maziar Adl
 Todd Bird
 John Carter
 Prem Daniel
 Arturo De Guzman
 Lori Espy
 John Hunter
 Ken Jakemer
 Theresa Klemme
 Fiona Man
 Manoj Misra
 David Robbins
 Howard Rosenthal
 Patrick Walsh
 Curtis Wampler
 Kristin Wilcox
 Vincent Zeimis

LEND A HELPING ^{PM} HAND

Building Community with Project Management



“LEND A HELPING PM HAND” AWARD TO GARTH KEMP OF ABC7

On December 21, 2012, PMI-OC honored ABC7 Eyewitness News weather anchor **Garth Kemp**, who received his award from **Dave Cornelius** at the Spark of Love Stuff-A-Bus event at The Honda Center in Anaheim.

Residents came out early to help Garth Kemp (dressed as a giant elf) stuff a bus full of toys.

Disney on Ice members were on hand with 50 Mickey Mouse plush toys, and Disney on Ice tickets were handed out to those who brought an unwrapped gift.

JAKKS Pacific shows up every year with loads of toys, and this

year was no different. The company donated 10,000 toys to the Anaheim Stuff-A-Bus event

For 18 years, ABC7 and Southern California firefighters have joined forces to run the “Spark of Love Toy Drive,” which collects new, unwrapped toys and sports equipment for the under served children in our communities.

The “Lend a Helping PM Hand—Building Community with Project Management” award is part of PMI-OC’s newly launched Lend a Helping PM Hand program, designed to build community with educational institutions and

non-profit organizations through experiential projects and project management concepts.

The University of California, Irvine Extension Project Management Program, has partnered with PMI-OC on the Lend a Helping PM Hand program, combining education and community service, as well as providing opportunities for students to enhance their careers, get project management experience, and contribute to the success of their association with PMI-OC.

Learning, Serving, and Leading with PMI-OC

PMI-OC is dedicated to professional development and networking opportunities for project managers and project participants. As part of our work, we are introducing a new leadership pathway that can transform individual project managers and benefit the organizations with which they are associated—their place of work, PMI-OC, and even PMI Global.

PMI-OC Value Learning, serving, and leading are cornerstone principles of PMI-OC. Based on these values, we have had great success, including:

- 23 years of service
- PMI Global Chapter of the Year Award
- 1,700 members
- Most members are certified professionals
- Second largest chapter in California
- Fourth largest chapter in Region 7
- One of the top 50 global chapters
- A community of experiential leadership and communication opportunities

We are proud of the volunteers at PMI-OC whose leadership has had significant impact at PMI-OC and beyond. The following testimonials show why members value their leadership experiences with PMI-OC.

Transformed Leaders



Kristine Munson
PMI-OC Fellow

"I attribute my current professional success to my PMI-OC volunteer leadership experience. As a volunteer, I improved my basic project management skills and developed leadership skills in a safe environment. These experiences prepared me to seize similar opportunities professionally. Along the way, I met other PMI-OC members who remain my mentors and friends."

Cornelius Fichtner
PMI-OC Fellow

"When I joined PMI-OC, I was just your average project manager. The encouraging environment of the chapter allowed me to take on one leadership role after the other, all the way up to chapter president. This gave me the opportunity to learn about, practice, and improve my leadership skills, culminating in the launch of my own project management training company."

Dave Cornelius
VP Communications 2012

"Participating as a PMI-OC volunteer gave me confidence and a place to belong during my period of employment transition. I was introduced to the OC Project Masters Toastmasters Club, a PMI-OC affiliate, which gave me a voice to speak and write publicly for the first time. It has been an amazing opportunity to learn, serve, and lead without the fear of failing."

Nora Goto
VP Communications 2011

"I was often asked, 'Why do you volunteer for PMI-OC?' The answer always was, 'For learning and personal growth.' Most of us are not born perfect leaders. Improved leadership abilities come with greater experience. Leading and working with others in a volunteer environment created more opportunities for learning, developing self awareness, and building social skills."

Diana Wei
Director of Social Media

"If you asked me three years ago how long I planned to stay with PMI-OC, I would have said just long enough to attend some meetings now and then. Little did I know, I would become involved in over seven different positions and now serve as the Director of Social Media. If not for PMI-OC, I would not have gained the leadership skills and project management insights that I use today."

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We are excited to introduce our Learning, Serving, Leading progressive pathway for project managers. The following table outlines the many opportunities to learn, serve, and lead at both PMI-OC and PMI Global.

Your Progressive Elaboration Experience

			Advance	
			Build	
Start				
PMI-OC	Learning	<ul style="list-style-type: none"> • New Member Orientation • PMP Prep Class • OC Project Masters Toastmasters Club • Bi-monthly Networking Events • Annual Project Management Conference 	<ul style="list-style-type: none"> • Monthly Dinner Meetings • Webinars • Podcasts • Annual Project Management Conference 	<ul style="list-style-type: none"> • Advanced Topic Seminars • Leadership Seminars • Annual Project Management Conference
	Serving	<ul style="list-style-type: none"> • Volunteer Entry Level • Annual Spark of Love Toy Drive • Contribute to our social media groups 	<ul style="list-style-type: none"> • Volunteer Chair • Volunteer Mentor • Lend a Helping PM Hand 	<ul style="list-style-type: none"> • PMI-OC Board of Governors • PMIEF Liaison
	Leading	<ul style="list-style-type: none"> • Volunteer Writing • Special Event Lead 	<ul style="list-style-type: none"> • Volunteer Teaching • Annual Project of the Year Award • Event Master of Ceremonies • Volunteer Director 	<ul style="list-style-type: none"> • Volunteer Speaking • Volunteer Board of Governors
PMI Global	Learning	<ul style="list-style-type: none"> • New Membership • Join PMI-OC • PMP Certification 	<ul style="list-style-type: none"> • Download Congress Papers 	<ul style="list-style-type: none"> • Leadership Institute Meeting (LIM) • Region 7 Meeting
	Serving	<ul style="list-style-type: none"> • Contribute to PMI LinkedIn and Facebook groups 	<ul style="list-style-type: none"> • Volunteer PMI Global 	<ul style="list-style-type: none"> • PMIEF
	Leading	<ul style="list-style-type: none"> • Start an exam prep study group for CAPM or PMP 	<ul style="list-style-type: none"> • Join a Community of Practice 	<ul style="list-style-type: none"> • PMI Master Leadership • Lead a Community of Practice • Chair a Committee • PMI Board of Directors

Take Your First Step Today

Please visit www.pmi-oc.org for information about professional development activities, news, and events.



EARNING PDUs THROUGH LEVERAGING ACTIVITIES

In our current series of PDU tips, we are exploring the many ways you can earn PDUs. Today we look at how you can gain PDUs through leveraging your PDU activities.

One of the best ways to proactively plan your PDUs is to get creative and leverage one PDU opportunity upon another. For example, if you attend a PMI chapter meeting, you will earn one PDU in Category A.

Why not piggy-back on that PDU opportunity by taking an active role as a volunteer at the registration desk? This will give you credit toward Category E PDUs, as it counts toward volunteer service. You'll be at the chapter meeting anyway, so it is a great opportunity to use your time wisely and get the most out of the evening.

For an even better use of your time, how about listening to the latest PM Podcast episodes in your car on the journey there and back? This will give you Category C PDUs as self-directed learning.

Let's take another example. Your chapter is hosting an evening event which includes a panel discussion. You can volunteer to speak on the panel or to moderate the panel. Your preparation time and the time spent delivering your

presentation as part of the panel both count toward Category D PDUs, giving back to the profession by creating new project management knowledge.

You can take notes during the event and write an account of the evening for the chapter newsletter or blog. You could even turn your presentation into an article for a magazine. This will give you some more Category D PDUs.

If the discussion covers topics that you know will help one of your colleagues, you can coach them on this topic and claim Category E free PDUs for volunteer service. And, of course, on your way to and from the panel discussion, you can listen to the latest PM Podcast episodes on your iPhone or other mobile device and claim Category C PDUs for that.

In these examples you will have used one event to generate PDUs in multiple categories. Don't be afraid to get creative and leverage PDU opportunities.

EARNING PDUS THROUGH FORMAL TRAINING

Formal academic educational courses related to project management can earn you ten to 15 PDUs per semester. These are not free PDUs, as you have to be registered on an academic course offered by a university or college. You don't have to complete a whole degree, and in fact only individual courses will be recognized (PMI) for PDU credits. The transcript or grade report is required for confirmation.

This will allow you to earn PDUs in Category B. It's one of the easier categories, as long as you are not financially challenged. If you are, there may well be project management related courses offered at your local community college that are more economical than the state and private collegiate institutions.

Wherever you decide to study, it goes without saying that the course must have a project management element. That doesn't mean it has to focus 100 percent on project management. When only a portion of your course relates to project management, you can calculate the PDUs by the percentage of overall curriculum focused on the topic.

If your course is not offered by a university or college, you will have to keep records of your registration form, certificate of attendance, and a syllabus or brochure setting out what the course covered. You will also have to demonstrate the qualifications of the instructor.

Like formal academic training, continuing education (CE) can be submitted as PDUs. Unlike formal academic training, CEs are courses that comply with IACET standards.

Generally, CE units can be converted to PDUs at a ratio of one CE unit to ten PDUs.

Your best bet is to confirm with the provider that the course complies with the ANSI/IACET 1-2007 Standard, and, of course, it must be about project management. ■



The Fiscal Cliff

AN INTERVIEW WITH BERND STEINEBRUNNER

By Deborah Cantwell

The “fiscal cliff” was all the buzz of conversation at the end of 2012 with a host of tax provisions and spending cuts going into effect at the stroke of midnight.

Fortunately, Congress retroactively passed the [American Taxpayer Relief Act of 2012](#), or “ATRA,” on January 1, 2013.

SIX THINGS WE NEED TO KNOW ABOUT ATRA American Taxpayer Relief Act of 2012

TAX RATES

The Good News

The current tax brackets and capital gains and dividends **will continue**. And a special 0% rate for those in the 10-15% marginal bracket will apply.

The Bad News

The **significant change** is for those making \$400,000.00 / \$450,000.00 and greater. There will now be a **39.6% tax bracket** and subject to a higher 20% tax rate for long-term capital gains and qualifying dividends.

ALTERNATIVE MINIMUM TAX (AMT)

ATRA permanently extends AMT relief, retroactively increasing the AMT exemption amounts for 2012.

Filing Status	Before ATR Act	After ATR Act
Married Joint	\$45,000	\$78,750
Single	\$33,750	\$50,600
Married Separate	\$22,500	\$39,375

And also permanently extends the allowed nonrefundable personal income tax credits to be used to offset AMT liability.

ESTATE TAX

The Act makes permanent the exemptions that were in effect in 2011 and 2012. The change is the top tax rate is now 40% beginning in 2013.

ITEMIZED DEDUCTIONS

Beginning in 2013, personal and dependency exemptions and itemized deductions will be phased out for incomes exceeding specified income thresholds.

PROVISIONS MADE PERMANENT WITH THE ACT STARTING IN 2013

- Marriage penalty relief
- Dependency care, adoption, and child tax credits
- Higher limits for certain education savings accounts, employer education programs, and assistance deductions

TEMPORARY EXTENSIONS

- Earned income credits for families of three or more until 2017
- American Opportunity credit until 2017
- \$250 above the line deduction educator for classroom expenses
- Age 70.5 up can exclude up \$100,000 in charitable giving
- Exclusion of qualified mortgage debt forgiveness till 2013
- Exclusion of 100% capital gain of small business stock sales acquired before January, 2014
- 20% bonus depreciation and expanded Section 179 expenses through 2013

This article is a brief synopsis of the ATRA provisions gathered from Bernd Steinebrunner, CFP® Financial Planner with MetLife.

[Click here for the full article and details](#), or you may e-mail Bernd at bsteinebrunn@metlife.com

Bernd Steinebrunner, CFP
Certified Financial Planner

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See ad on page 20.



Founder's District Area C-4 International and Table Topics Spring Speech Contest



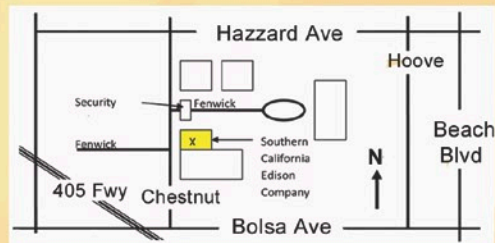
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8:15 AM General Registration
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- Improve time management skills.
- Strengthen interviewing techniques.
- Employ effective communication.
- Enhance listening skills.
- Increase productivity.
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[Click here for map.](#)

Meeting Schedule

February 04
February 11
February 25

[Click here to learn more.](#)

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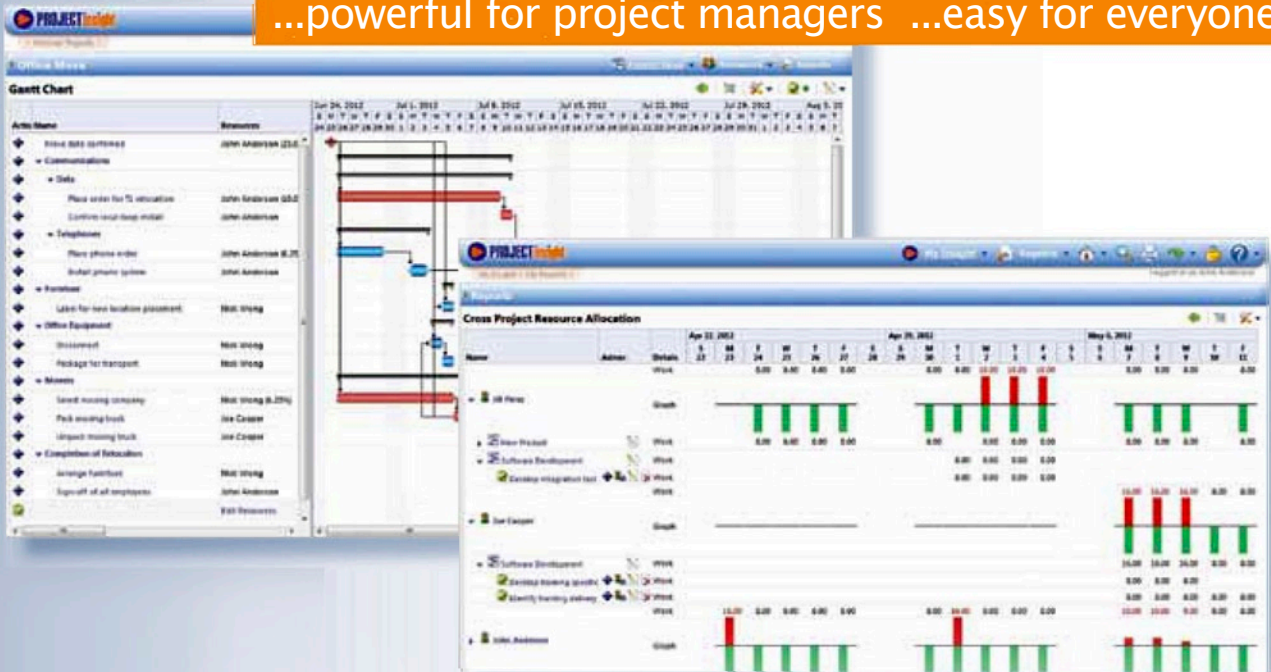
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Feb 04, 11, 25

OC Project Masters Meeting

Weekly meetings: Mondays, 7:00 pm at Carrows in Huntington Beach. No meetings on third Monday of the month.

See page 19.

Feb 12 Dinner Meeting

Gregg Oliver:

“Leading Without Authority”

See page 5.

Feb 16 Advanced Topic Seminar

Joe Brannon:

“Lean Methodology”

See page 5.

Feb 16 **NEW!** Career Workshop Series

Session 1: “Strategic Job Strategies”

See page 10.

Feb 20 Networking Meeting

Location TBA

Mar 02 Advanced Topic Seminar

Mike Bissonette

“Project Management in Aerospace and Commercial Industries”

Mar 02 **NEW!** Career Workshop Series

Session 2:

“Interactive Resume Workshop”

See page 10.

Mar 04, 11, 25

OC Project Masters Meeting

Weekly meetings: Mondays, 7:00 pm at Carrows in Huntington Beach. No meetings on third Monday of the month.

See page 19.

Mar 09 Toastmasters Area C-4

Spring Speech Contest

See page 18.

Mar 12 Dinner Meeting

Joe Brannon:

“Lean Concepts for Project Management”

Mar 16 **NEW!** Career Workshop Series

Session 3: “Quantify Career Achievements” See page 10.

Mar 20 New Member Orientation

Brandman University

Mar 23 Breakfast Club

Location TBA

Mar 30 **NEW!** Career Workshop Series

Session 4: “Program Wrap-Up” See page 10.

Events may be subject to change.



ORANGE COUNTY CHAPTER

Project Management Institute
Orange County Chapter, Inc.

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