



# Milestones

January 2011

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

THE  
ROLE  
OF  
THE

# PMO

IN ENABLING ENTERPRISE SUCCESS



A well designed and managed PMO can play a significant role in the success of any enterprise. The key is to ensure the PMO is valued by executive management and embraced by project managers and team members. A well designed and sanctioned PMO can meet each of these lofty goals.

**Steve Romero**, our January 11 dinner meeting speaker, is the IT governance evangelist at CA Technologies, Inc. His mission is to help enterprises realize the full potential of their IT investments for strategic and competitive advantage. In this capacity, he acts as a strong advocate for the customer, speaking around the world to users, prospective clients, industry organizations, and IT luminaries to identify and communicate IT governance best practices.

[Click here to register.](#)

January  
dinner  
meeting  
sponsor





## 2010 Board of Governors

**Stephen June, PMP**  
President

**Derek Barraza, PMP**  
Vice President  
of Operations

**Nora Goto, PMP**  
Vice President  
of Communications

**Alvin Joseph, PMP**  
Vice President  
of Administration

**Richard Nalle, PMP**  
Vice President  
of Strategic Planning

**Gregory Scott, PMP**  
Vice President  
of Finance

**Sylvan Finestone, PMP**  
Past President

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# PRESIDENT'S COLUMN

## Strategic Thinking. Easier Said than Done.

One of the fundamental objectives in the creation of the current board of governors was to establish the board as a strategic body, with the second tier of directors given the tasks of developing the tactics to carry out the board's strategy.

Well, one year later, the board is still struggling with this concept. We recently had a mid-term review of our strategic plan. After spending even a few minutes talking about a strategic objective, the discussion turned tactical. For example, we were discussing the strategic concept of improving member participation in the monthly dinner meetings. This subject has been an ongoing concern for quite some time. We almost immediately dove into possible solutions, such as better speakers, or enhanced giveaways, or more aggressive marketing. We didn't carefully consider the reasons behind the declining participation.

After all, the board, just like the membership, is composed of project managers. We tend to think of ourselves as problem solvers, results oriented, detail oriented managers. We have not (at least not yet) evolved into leaders. It is in our nature to drive a project plan. Creating the vision upon which a project plan is created is new and challenging to us.

A new board was recently elected. Both the new and existing members seem to be interested and dedicated in implementing a truly strategic board. The nominating committee worked very hard to identify candidates who have the potential to not only work and think in a strategic manner, but to work in a unified team that together can drive the chapter in new strategic directions. I thank them for their efforts.

We are at the end of the current three year strategic plan. A new plan will have to be created. The strategic plan is needed not only to drive the local chapter into a new direction, but to meet the needs of PMI® and the local business environment as well. PMI has rolled out new initiatives on branding and education. Hiring of project managers in our community has been sluggish, but appears to be improving. Potential chapter sponsors have been reluctant to provide support without a clearly defined long term value proposition that is beneficial to them. The local chapters of PMI must be able to respond to these conditions not in short term knee jerk reactions, but in long term strategies that leverage our skills and talents for the benefit of all the stakeholders.

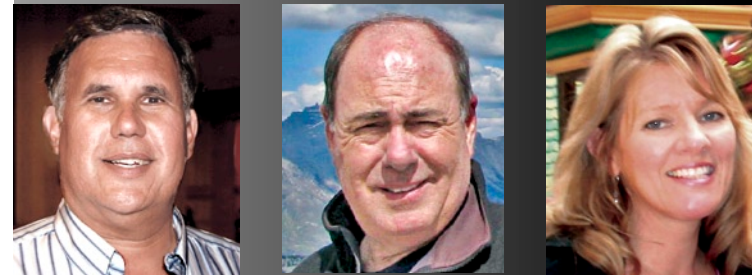
The board has made some notable progress. Marketing is poised to roll out a new strategy using social media as an additional way to communicate with the membership. Dinner speakers are scheduled through March, instead of the month to month approach of the recent past. Finance is looking at potential vendors to handle our bookkeeping activities as an outsourced function.

These initiatives are positive signs, small but important steps in the right direction. I believe that the composition of the new board has the potential to finally become strategic.

Work is needed to develop the second tier of volunteers into a solid group of leaders who can take over the day to day issues of running a large chapter. Developing and nurturing new tactical leaders will be an important goal of the board. If we can accomplish this process, then the board can concentrate on longer term concerns.

We could consider strategic concepts such as where we want to be in three to five years. Do we anticipate having 2,000 members or 2,500 members? As many of the current members approach retirement, how do we best support our younger members? How can we better meet the continuing need for networking? Where does the chapter fit in Orange County in relation to other not for profit entities? We used to be considered a leading chapter in our PMI region, brimming with new and fresh ideas. How do we get there again? These are questions that I look forward to addressing in the new year.

**Stephen June, PMP**  
2010 PMI-OC President

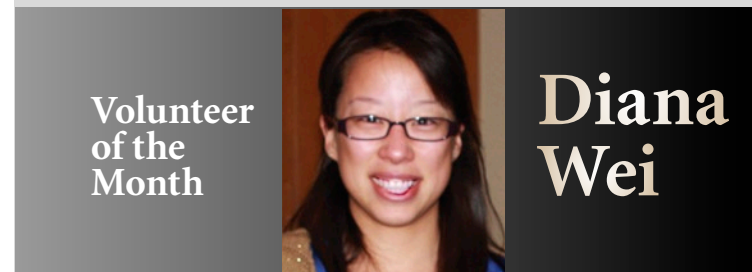


## 2011 Board of Governors Election

Two hundred and seventy-four members cast their votes and completed the election process. **Robbin McKenzie Thomas** (right) was elected as a new governor and joins returning governors **Stephen June** (left) and **Greg Scott** (center). Greg had been appointed as the finance governor upon Tariq Shakier's resignation.

Our fourth candidate, **Adam Khamseh**, has shown interest in volunteering for the chapter in other capacities, and we look forward to his continuing involvement.

Thank you to all who expressed their interest in the process and to those who participated in the election, either by voting or as a member of the election committee, headed by Onyeka Kpaduwa. We would also like to thank Doug Lada and Sylvan Finestone for their participation on the nominating committee.



Volunteer  
of the  
Month

**Diana  
Wei**

Diana has been involved in the chapter since July 2009 as a photographer and is one of our youngest members. She understands the power of networking and how to use it.

Since the beginning of 2010, Diana has been one of the administration team's most active and visible members. A quick learner, she fulfilled the role of business process analyst and then stepped up to become the operations deputy, managing the board meetings.

Currently, Diana is the director of social media, board of governors deputy, and process improvement and policy analyst. Her commitment and dedication to the chapter have earned her the Volunteer of the Month for December, as well as the satisfaction of knowing that her services have not gone unnoticed.

Diana graduated from UC Riverside in 2006 with a BS in business administration. She now works part-time in marketing and social media management, but is interested in a full time position.

Diana grasps new concepts quickly and is an adept team player you can always count on. The chapter greatly appreciates Diana's contributions and looks forward to many years having her as part of our organization.

**Joe Paradiso, PMP**

## Volunteer Opportunities

### Internal Marketing: Milestones Contributors

The *Milestones* team is seeking writers (or copy editors) to write articles about dinner meetings, advanced topic seminars, and other chapter news. Clear and concise writing styles are required.

### Internal Marketing: Milestones Photographers

The *Milestones* team is looking for individuals with an eye for style to take pictures at chapter events for *Milestones*. Must have a digital camera and flash unit for photos in indoor and outdoor venues. Upload photos to Qtask or other specified site.

### Finance: Dinner Meeting Name Badges

Prepare and print attendee name badges for various PMI-OC events. Requires up to four hours per month. Start immediately.

### External Marketing: Affiliate Management Chair

The affiliate management chair will prepare affiliate agreements between PMI-OC and other Orange County organizations and manage affiliate relationships.

### External Marketing: Six 2011 Project of the Year Volunteers

Assist the POY chair, corporate outreach chair, and *Milestones* editor in publicizing the award and encouraging Orange County companies to participate. Assist with logistics and follow-up.

### External Marketing: Advertising and Sponsorship Volunteers and Committee Chair

Help define and manage sponsorship options (e.g. *Milestones* advertising, web advertising, corporate sponsorships). Solicit, obtain, and organize sponsors for PMI-OC events, initiatives, and paid advertisements for *Milestones* and the website. Solicit sponsors for chapter meetings, educational programs, and special events.

### External Marketing: Corporate Outreach Volunteer

Conduct research, compose marketing messages, attend PMI-OC events, follow up contacts in business communities, and participate in presentations with other organizations.

### Administration: ATS Speaker Coordinator

Find speakers for the four hour ATS held on the first Saturday of each month. Obtain commitment forms, bios, and photos.

### Finance: Events Registration

The finance team needs individuals to attend the monthly dinner meetings and assist with attendee check-ins. Duties may include money handling, head count tracking, and follow-up reporting.

### Information Technology: Event Website Editor

Set up the events (dinner meetings, ATS, and PMP prep workshops) on the PMI-OC website, following a predefined schedule. Coordinate with programs and marketing and keep the programs director informed of the registration status by pulling the list of registrants monthly. Ten to 20 hours per month. Some knowledge of HTML, website publishing, and graphic tools desirable.

Interested in volunteering for any of these or other opportunities? Contact Joe Paradiso at [volunteers@pmi-oc.org](mailto:volunteers@pmi-oc.org) or [click here](#) for detailed descriptions of the positions on the volunteer opportunities page at [www.pmi-oc.org](http://www.pmi-oc.org).



Nonprofit Project Leadership:  
Making a Difference by

# SERVING OTHERS

**BARBARA BARRIENTOS**, the qualified toastmaster speaker at the December dinner meeting, began by simply pointing to several tables full of presents donated by PMI-OC members for the annual Spark of Love Drive and said, “I don’t have to tell you that it does not stop there!”

Then, Barbara introduced the concept of “servant leadership,” a relatively new term first coined by Robert Greenleaf in his 1970 essay, *The Servant as a Leader*, although various references to the philosophy and practice of this style of leadership go back to antiquity.

The idea is that the best leaders are those who do so with an underlying attitude of being a server first, and a leader second. Those who subscribe to the philosophy believe that continued adoption of such an attitude allows a leader to lead with authority rather than power, which often results in the pursuit of personal acquisition of

material possessions at the expense of others.

Barbara proceeded to acknowledge that PMI-OC is successful thanks to more than 80 rotating volunteers who continue to “give back” after receiving their certification. She explained our responsibility is to not only to serve as good examples in professional organizations, but also to volunteer our many skills in hundreds of other ways. Most importantly, she said, “Teach servant leadership to



your children, as my mother taught me.” She said one way to teach one’s children is to ask that your birthday present be a letter describing the adventure and benefits of providing some unique volunteer service. Barbara did just that with her three daughters, and it instilled a passion for volunteering.

Barbara has managed the New Hope Crisis Counseling Center in Orange for 12 years. This center, which provides international phone counseling for every imaginable form of crisis, relies upon nearly 200 volunteers! She said that she stayed ten years longer than she had intended, but the love of servant leadership was still a burning fire within.

Adopting an attitude of servant leadership helps the members of the call center understand that when a man calls and sobs, “My dog died,” the volunteer just listens, and does not relate his similar experience. Right then, in that moment, it is about the caller, not about you.

Barbara explained that many important skills, such as empathetic listening, unfold quickly and naturally, positively impacting all areas of one’s life. Having the servant leader attitude results in a multiplier effect of gifts in return, in ways you could never imagine. She says that nothing can compare to the gift of hearing, “Thank you for loving me. Thanks to you, I know I have worth.”

Barbara reminded the audience that there are hundreds of organizations like Big Brothers and Big Sisters that always need more volunteers, and there is a growing number of elderly persons who need only for someone to read to them, sing with them, or just hold their hand.

“People watch you and learn from you. What will YOU do?”

James L. Morin PMP

## SPARK OF LOVE TOY DRIVE

At the December 14th dinner meeting, we once again held our annual Spark of Love Toy Drive to collect toys and sporting goods for kids from infancy to 17. Many people brought toys to donate, and our toy table was overflowing with gifts!

The chapter also donated \$500 worth of toys and hosted five fire fighters from the Costa Mesa Fire Department for dinner. The firefighters brought their fire engine to load up the toys to be given to children in the local area.

The Spark of Love Toy Drive was launched 18 years ago by the Orange County Fire Chiefs’ Association to consolidate donations and is part of the Orange County Toy Collaborative. The organization is comprised of the U.S. Marine Corps Toys for Tots, Orange County Social Services, Operation Santa Claus, St. Vincent de Paul Society, and the Orange County Firefighters. Donations are trucked to a distribution center, a warehouse on the former El Toro Marine Base.

From there, over 300,000 toys are taken to multiple distribution centers where they are given to underprivileged children in Orange County.

We are proud to have assisted in the collection of toys for this important organization. Thank you to all who participated in making this year’s Spark of Love Toy Drive a great success.

Stacey Hutzler, PMP



Photos by Rey Castillo



## PMI-OC Orientation January 19, 2011

### Welcome to Project Management Institute-Orange County Chapter.

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 Governors, 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, January 19, 2011**  
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:

**New Location**  
**Brandman University**  
16355 Laguna Canyon Road  
Irvine, CA 92618

#### Cost:

None.

#### Questions:

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

[Click here to register.](#)

## Sample PMP® Exam Questions

These questions are based on the *PMBOK® Guide—Fourth Edition*. Answers are on page 18.

1. Which of the following is not an input of the plan procurement process?
  - a. Cost performance baseline
  - b. Teaming agreements
  - c. The procurement statement of work
  - d. The scope baseline
2. Every project includes the following stakeholders except
  - a. sponsor
  - b. outside vendors
  - c. project team members
  - d. project manager
3. A member of your team brings ideas for enhancements to the scope of work to a team meeting. These suggestions will add work to the project that is beyond the requirements of the project charter. As project manager, you point out that only the work required for the project should be completed by the team. Any request for enhancements should be formally submitted through the
  - a. change order system.
  - b. change control board.
  - c. control scope process.
  - d. risk register process.
4. The verify scope outputs include
  - a. influencing the factors that create project scope changes.
  - b. documenting the completed deliverables that have been accepted.
  - c. claiming the stakeholders' formal acceptance of the completed project scope.
  - d. monitoring specific project results to determine whether they comply with relevant quality standards.

Sample exam questions submitted by  
**Core Performance Concepts, Inc.**

# New Members and PMPs

#### NEW MEMBERS

Sharif Abdulhafiz	Stephen Titus
Adeel Ahmed	Ian Tonks
Amir Arefnia	Tahir Usmani
Muhammad Bajwa	Elizabeth Valenzuela
Alireza Bavafa	Vibi Varughese
Joseph Brannon	Kathy Wagner
Cherri Chilton	Kevin Warkentin
Joseph Commodore	Tonia Williams-Osborne
Mark Davis	Steven Windley
Dan Diep	Dayle Withers
Paul Dinh	Louis Zhu
Hadeel Elamin	
Gheorghe Gafencu	<b>NEW PMPs</b>
Grace Hern	Steven Backer
Robert Howie	Hadeel Elamin
Ray Jordan	Gary Gilde
Raj Kharatmol	Jame Higgins
Semsettin Kilic	Jon Jorgensen
Lee Ann Kline	John McFarland
Jian Liang	David Opoku
Po-Cheng Lo	William Smith
Matt Magdaleno	Paul Walls

Kenneth Maxfield  
Rodolfo Mortero  
Eugene Murray  
James O'Connor  
Irina Obenauer  
Deborah Pierron-Bryhl  
Carolyn Rabourn  
Charles Reinhardt  
Stephanie Rubio  
Sam Saliba  
Hilda Sherman  
Mandeep Singh  
Srikanth Somasila

## CALL FOR NOMINATIONS



## 2011 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 2011 PMI Project of the Year.

#### Preliminary (Chapter) Level:

POY nominations must be submitted to PMI-OC no later than **January 24, 2011**. A PMI-OC panel of judges will select the chapter's nominee (PMI-OC POY). The PMI-OC POY project manager will submit the nomination to PMI Global no later than March 1, 2011.

#### Semi-Finalist Level:

A PMI Global panel of judges will select three semi-finalists from nominees submitted by individual PMI chapters. The three semi-finalists will be selected by May 9, 2011 and will be submitted for finalist judging.

#### Finalist Level:

A final PMI Global panel of judges will select the 2011 PMI Project of the Year from the three semi-finalists. The recipient will be selected by July 18, 2011, and the award will be presented at the PMI Global Congress, North America, in October, 2011.

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).

The 2010 PMI-OC Project of the Year was awarded to **The Boeing Company, My Learning Company**.

See June 2010 *Milestones*.

The 2010 PMI Project of the Year was awarded to The National Ignition Facility Project, Livermore, California.

[Click here to view project.](#)



#### Deadline for Nominations:

*Preliminary chapter level nominations are due no later than **January 24, 2011**. 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.*

*[Click here for more information.](#)*



# 2010 Keynote

## SOUTHLAND TECHNOLOGY CONFERENCE

### MOVING BEYOND MIGRATION: REINVENTING PROCESS IN THE CLOUD

SoTeC attendees caught up on the present and saw a glimpse of the future of cloud computing in the keynote address by **Peter Coffee**, Director of Platform Research at Salesforce.com and internationally known author, teacher, and lecturer on innovative information technologies.

December *Milestones* included an article summarizing the stimulating and insightful keynote speeches of **Susan Cramm** and **Rick Hopper** at the 2010 Southland Technology Conference (SoTeC), held in Long Beach in October.

The third keynote speech from **PETER COFFEE**, internationally known former technology editor of *eWeek*, is summarized in this month's *Milestones*.



Photo by Colby Riggs

To put the last decade of change into perspective, Peter said that in 1999 everyone wanted to know why all enterprise applications are not like Amazon.com. Now, in 2010, everyone wants to know why they are not all like Facebook! He said that in 2009, social networking users surpassed e-mail users. The younger generations “live” in the cloud. They don’t even use e-mail anymore. Some companies are catching on. Bank of America routes tweets from their customers to their customer service team.

Briefly, cloud computing is the delivery of applications via a web browser, while the software and data are stored on web networked servers. The term was born in the late 1990s when several application server providers (ASPs) began supplying application access over the web. The software accessed on these remote servers via the cloud is called on-demand software or software as a service (SaaS).

Perhaps the most successful example of SaaS remains Salesforce.com, which provides customer relationship management (CRM) software for sales force automation

via the cloud. Salesforce.com customers can rent server space and pay monthly “per use” fees for web access by a widely dispersed sales force. What is being rented is not just the server space and application; it includes the configured hardware and operating systems, databases, and file systems as well.

This offers many advantages. The customer’s IT department no longer needs to pay for individually licensed copies of the software, get it to the dispersed sales reps, have it installed for them, upgrade it when new releases are available, worry about security issues, or backup data. In other words, the customer enjoys improved scalability, availability, security, and reliability with a lower, more predictable cost. Also, the customer’s IT department may be freed up to work on more strategic initiatives. On a larger scale, sharing applications across many customers means less servers and less energy to power and cool them; in other words, a greener solution.

Historically, a disadvantage for the customer was a perception that SaaS software must be used as is with little opportunity for customization. Also, integration with other legacy applications was believed to be impossible or very costly and difficult to maintain. And if the application is multi-tenant (several customers, perhaps even competitors, sharing a single instance of the application in real time), then data security might be at risk.

Platform as a service (PaaS), the main focus of the speaker’s presentation, allows a customer to rent the servers, operating systems, files systems, storage, and network capacity like in SaaS. In addition, PaaS provides sophisticated application environments to more rapidly develop and deploy new or migrated business applications with robust interfaces, access databases, and business utilization process workflow functionality.

To show the sophistication of underlying technology, Peter said there are over 300 technologies working together in real time in the Amazon.com web page. This is referred to as a “mashup,” which combines data, functionality, and presentation from multiple sources to make existing information more personalized and useful. The mashing up of technologies is possible because so many companies have published application programming interfaces, which are specifications that developers can use to facilitate application interaction.

Salesforce.com now offers an enterprise application framework, Force.com, that allows customers to develop global, available 24/7/365, scalable, integrated, customizable, secure, workflow driven applications with built-in

development toolkits. Thanks to the marketplace in the cloud, these applications can integrate with the desktop applications, such as Excel and Word, via Google, ERP applications, such as SAP and Oracle, and social media via Facebook, and shipping, customer, and vendor management software (FedEx, D & B) via Amazon Web Services.

Peter said that this integrated cloud development environment obliterates the entry barrier for startups or competitors. Using PaaS, there no need for on premise infrastructure and support. Software may be built with hundreds of thousands of SOX-compliant, reusable, debugged objects and workflow rules. Facility, network, and platform security is ironclad, and customizations can be accomplished at the meta-data level so that upgrades are not dictated by the vendors who provide them. Integration with legacy applications is easy, and the platform deploys to every new portable device automatically.

Independent audits show that the reinvented Force.com platform allows application development at five times the typical speed. Peter walked the conference attendees through real world, dramatic success stories across several industries. For example, the 2010 census application was developed and deployed to over 170,000 workers in 2,200 agencies in only three months.

“What is the major concern of 80 percent of CIOs?” Peter asked. “That the cloud itself is insecure, and so are multi-tenant SaaS applications.” Peter explained that cloud security is “expensive, but is absolutely the best.” Peter also reminded the audience that integrating secure data is not new. Banking, internet purchases, and cell phone applications have been co-mingling data for many years now.

In closing, Peter said that the future for the IT professional is all about business process reengineering and collaboration. India used to be where international companies outsourced program coding. Increasingly, India’s software focuses on adding value using the cloud via business process management.

In the coming years, U.S. IT departments will follow suit, and there will be a shift toward mission-critical cloud applications, resulting in greener, leaner IT departments in the infrastructure and support areas, but growth will occur in the area of business process reengineering. Peter said this wind of change is coming, and IT directors should not fear it. “After all, kites rise against the wind.”

Many conference attendees admitted the following morning that they slept very little. They were just too excited, imagining new cloud based applications!

**James L Morin PMP**





# The Agilista

**Donna A. Reed**

Your PMI® Agile Community of Practice Rep

## Hiring Managers Admit They Need Agile PMs

In a recent “very candid” conversation with several long time clients, I asked them what they really wanted and needed from their PMs and team leaders. Everything they said indicated that **Agile PMs are exactly what they need.**

These clients shared three things they need in a project manager.

### 1. “We don’t care *how* they do the project; we want them to do what is best.”

I loved this answer because it told me they were more interested in delivering value to their customers than following a bunch of processes just for sake of following a process. Many of them know their PMOs have put processes in place to help, but many of the hiring managers are wondering if there are too many processes that are starting to make projects less productive.

### Process doesn’t make a project succeed; people do.

My clients believe the right people make a project succeed, especially the people leading it. So when I shared the traits of an Agile PM with them, they got very excited and asked how they can find and hire them. Agile PMs know when and where to use project methodologies, practices, and tools. It is not always a cookie cutter answer, especially in IT projects that tend to be more complex with changing team resources.

I recommend they put the skills they want in the job descriptions and interview for them. Don’t just rely on someone having some certification. Certifications tell you the applicant knows about how a methodology works, but it doesn’t tell you the applicant knows where and when to use this knowledge for all the types of projects out there.

### 2. “We need confident PMs.”

My clients wanted people with skills to make decisions and stand behind them with good reasons when questioned about their decisions. They felt that neither teams nor management would follow them if they lacked confidence and didn’t know why they were doing things.

Isn’t this true of most leaders in our lives? We follow those who exude confidence, but we don’t want to just follow them blindly. We should be asking and challenging them before we buy in and not follow them as sheep to the slaughter.

Great Agile PMs will be able to make decisions and advise management by involving the team, the customer, and management through a project so that decision making is done most effectively with the most recent and best data known.

### 3. We need PMs with the courage to speak up, not just “yes people.”

My clients don’t need or want projects with unaddressed issues because the project managers and teams are afraid to speak up and take ownership of the project’s success. That is where Agile PMs and teams are perfect; they manage and mitigate risk every step of the way, not just at the beginning. Agile PMs use frequent retrospectives during the project to keep a pulse on what is working, what is not, how to make it better, and how to remove risks.

I also told my clients that they want PMs who are intelligently disobedient, and that caught their attention. They asked what that was. I explained that it was where PMs know when and how to depart from the norm in opinions, cultural standards, and processing and take leadership responsibilities very seriously. Which means they have the courage to do right for your team, the customer, themselves, and the organization, not letting fear say all is well when it is not.

It is tougher and harder these days with people holding onto their jobs with everything they have and are afraid to speak up. I told them they need to interview for this skill in their situational interview techniques and find out if they had courage in the past. If they didn’t, they sure won’t have it moving forward.

There were other responses I will write about, but the bottom line is clients are telling me that **LEADERS ARE NEEDED!**

Not just PMs who report status or create a project plan, but PMs who have project practices and tools they can use to best leverage the project at hand.

Competition is hot and getting hotter in this U.S. marketplace, and PMs need these skills to help companies stand out and bring value to their customers quickly. Do projects the best way possible; take ownership; speak up.

Sometimes just knowing what hiring managers really need can help.

To see more articles on being an agile PM, go to [www.AgilistaPM.com](http://www.AgilistaPM.com).

**OC Project Masters Toastmasters Club for Project Managers**

- Speak
- Communicate
- Lead
- Earn PDU's

The Toastmasters program will help you to:


- Develop better speaking and presentation skills
- Learn to think quickly and clearly on your feet
- Build strong leadership abilities
- Hone your listening skills

You will learn these skills and more in a supportive, self-paced, fun atmosphere.

Visit our club today and begin to discover your confidence.

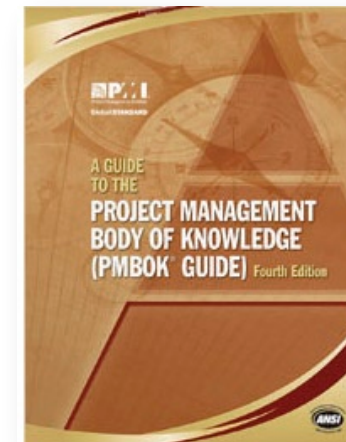
**Weekly Meetings:**  
Mondays, 7:00 to 8:30 pm  
Carrows Restaurant  
16931 Magnolia Avenue  
Huntington Beach

[www.ocprojectmasters.org](http://www.ocprojectmasters.org)



# WANT TO BE PMP CERTIFIED?

This workshop will use the *PMBOK® Guide—Fourth Edition* study materials and is intended for anyone who wishes to achieve their PMP certification, who meets



the requirements as identified by PMI® AND has studied the recommended project management literature, specifically, the *PMBOK Guide—Fourth Edition*.

## TRAIN THE TRAINER

**SATURDAY, JANUARY 8**  
8:00 a.m. to 5:00 p.m.  
Vanguard University, Costa Mesa  
Full day orientation and training event. Learn new training techniques for the *PMBOK® Guide—Fourth Edition*.

This event is open to all and earns eight PDUs, but space is limited. Cost is \$20.00.

[Click here to register.](#)

*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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## PMP EXAM PREPARATION WORKSHOP

### SEVEN SATURDAYS BEGINNING JANUARY 22

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 receive a classroom discussion guide and a supplemental text that includes study questions on CD-ROM. Participants will also have access to additional study material.

The first class on September 25 will be an orientation session.

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

<b>January 22</b> Half Day Orientation	<b>January 29</b> February 5	<b>February 12</b> February 26	<b>March 5</b> March 12
--	---------------------------------	-----------------------------------	----------------------------

**Where:** Vanguard University  
55 Fair Drive  
Costa Mesa, CA 92626-6597  
(714) 966-0397

**Cost:** The workshop fee is per participant, payable at the time of registration. [Click here to register.](#)

- **In Advance:** PMI-OC Members \$900  
Non PMI-OC Members \$1000
- **At the Door:** PMI-OC Members \$1000  
Non-PMI-OC Members \$1000
- **Group Rate:\*** \$800 each student

\*The group rate is applied to three or more students coming from the same organization. So, if a prospective student convinces at least two co-workers to take the class with him, each person will pay only \$800 for the workshop.



# HEALTH CARE

## PROJECT MANAGEMENT CHALLENGES IN THE NEW ECONOMY

As the New Year approaches, we are faced with decisions about health care coverage. In light of the recent health care changes, we may see a transformation of the managed care models of health care.

At our December 4, 2010 ATS, **Rhoda Brown-Christion**, a twenty year veteran in the managed care arena, presented the differences between each managed care model and how the government changes can affect project management within the health care industry.

Simply defined, managed care is a “system of medical management in which patients, purchasers, administrators, and providers are linked together as stakeholders with the common goals of improving the quality of health care and reducing medical costs.” Effective project management is essential when dealing with these types of complex value chains, especially when multiple parties are involved and the end deliverables include a reduction in cost.

Rhoda discussed six models: (1) the managed care organization model (MCO), (2) the health maintenance organization model (HMO), (3) the independent physician association model (IPA), (4) the point of service model (POS), (5) the preferred provider organization model, and (6) the out-of-network model (OON).

Some specific examples of managed care pursue high quality and cost effective care through total quality management techniques, utilization reviews, patient incentives, and contract management between insurers and providers (i.e. in-network).

An example of a regulation implemented to benefit patients is seen in the HMO model. If a patient is referred to an out-of-network provider, and the provider does not direct the patient to seek in-network care, the patient is eligible to dispute any out of pocket expenses incurred! Other forms of regulation are seen in the HMO and POS models, where authorizations are needed for certain levels of care. An example of this would be a requirement to get a primary care physician’s referral **before** going to visit a specialist.

The PPO model has the advantage of greater flexibility for out-of-network care, but it also has the risk of increased co-pay and/or deductible charges (paid by the patient) as more and more people participate in this model. In fact, as all individuals will be required to be insured or face an annual penalty, and the PPO model is the most flexible for out-of-network coverage, it is very likely that there will be large cost increases in its co-pay and/or deductible charges.

All of these managed care models fall under one of the following four types of product categories: (1) commercial, (2) senior (Medicare), (3) Medi-Cal, and (4) Medi-Medi. The majority of patients under the age of 65 fall into the commercial category.

One important note for project managers is that California operates differently in the commercial category than any other state. In addition, another challenge exists in the Medicare category as it relates to patient protection. For example, the current model pays doctors a higher percentage for patients with chronic conditions (i.e. diabetes) versus “healthy” patients.

Also, some additional scrutiny is being placed on “balanced bill” payment by patients. Why should patients have to pay additional costs on top of their existing monthly health care coverage bill?

Rhoda was joined by **Judith Ber- man, Ph.D.**, to discuss the specific challenges faced by project managers who serve the health care industry. Rhoda and Judith presented a number of resources to help deal with the regulations, changes, and guidelines



There are many challenges, but there are also benefits for project managers in the changes in health care. There will be an increased need for project managers to implement solutions and changes across the value chain. Scope definition and management are key focus areas for PMs in this area, as the scope can frequently change. PMs will also be involved in the timelines related to FDA drug development, hospital construction, and the implementation of these regulations.



Photos by Colby Riggs

affecting the industry. Links to these helpful resources are listed at the end of this review.\*

One of the more pressing challenges that project managers will soon face with the health care industry relates to the international coding diagnostics (ICD). These codes will soon be extended to cover more diagnoses. Therefore, all of the related systems throughout the supply chain will need to speak the same language when it comes to these codes. There will be serious challenges ensuring the consistency of data throughout all points on the value chain.

\*Health care management resources:

1. Practice Management Information Corporation  
PMIC: [www.pmiconline.com](http://www.pmiconline.com)
2. CMS: [www.cms.gov](http://www.cms.gov)
3. DMHC: [www.dmhc.ca.gov](http://www.dmhc.ca.gov)
4. DHCS: [www.dhcs.ca.gov](http://www.dhcs.ca.gov)
5. HSAG: [www.hsag.com](http://www.hsag.com)
6. NCQA: [www.ncqa.org](http://www.ncqa.org)
7. ICE: [www.iceforhealth.org](http://www.iceforhealth.org)

Lucy Stone, PMP





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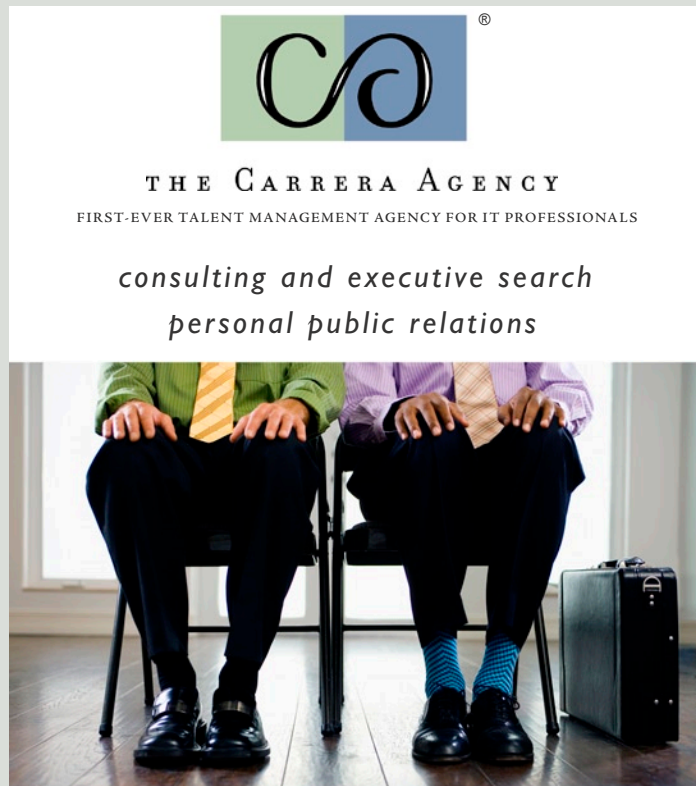
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## ADVANCED TOPIC SEMINARS



**January 8, 2011**

### Getting Project Results Without Authority

Presented by **Robert Pettis, PMP**

By the end of this presentation, the attendees will be able to effectively lead a project team whose members do not report directly to the project manager.

Attendees will learn what makes a project manager well respected, how to determine their personal power bases, how to build positive project team member relations, and how to participate and persevere in healthy conflict.

**Robert Pettis** has over 30 years of industrial work history as a project manager in hardware product development and engineering operations for products and services in aerospace, computers, in-circuit test systems, electronic power supplies, uninterruptible power systems, and electronic instrumentation.

Throughout his experience in these areas, Robert has found a need for successful project managers to develop basic leadership skills and competencies.



**February 5, 2011**

### Mastering Agile Documentation

Presented by **William Darnall**

By the end of this presentation, you will be able to fully understand the purpose of, and explain, major differences between Agile internal docs and Agile external user docs.

Presentation topics will include (1) corporate environmental and cultural policies, procedures, and personnel, (2) Agile project communication: collaboration versus documentation, (3) Agile internal project docs, and (4) Agile external user docs.

**Bill Darnall** is a professional writer and trainer. He owns *Writing and Training, Inc.* Bill has an engineering degree and an MBA with more than 25 years of technical writing and training experience. Bill is the author of five published technical books and is an experienced project manager. He used Agile software development methods long before they were called Agile.

**NEW LOCATION:**  
VANGUARD UNIVERSITY  
55 Fair Drive, Costa Mesa 92626

**PDU's:** There are four PDU's for this event.

**When:** Saturday, January 8, 2011, 8:00 a.m. to 12:00 p.m. [Click here to register.](#)  
Saturday, February 5, 2011, 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

## Coming Events

**January 8 Train the Trainer PMP Prep Workshop**  
See page 11. [Click here to register.](#)

**January 8 Advanced Topic**  
See column at left. [Click here to register.](#)

**January 11 Dinner Meeting**

**Steve Romero**  
VP, IT Governance, CA Technologies  
The Role of the PMO in Enabling Enterprise Success.  
See page 1. [Click here to register.](#)

**Jan 19 PMI-OC Orientation**

Brandman University  
See page 6. [Click here to register.](#)

**Jan 22 PMP Prep Workshop**

Vanguard University  
See page 11. [Click here to register.](#)

**Jan 24 Project of the Year**

Nomination Deadline. See page 7.

**February 5 Advanced Topic**

See column at left.

**February 8 Dinner Meeting**

**Susan Cramm**  
How IT Smart is Your Organization?  
[Click here to register.](#)

**March 5 Advanced Topic**

**Kristine Hayes Munson**  
How Do You Really Know?  
Project Monitoring and Controlling.

**March 8 Dinner Meeting**

**Craig Wilson**  
The Successful Project Manager:  
Enduring Lessons from Lawrence of Arabia. [Click here to register.](#)

**April 2 Advanced Topic**

**Dave Cornelius**  
Make It Count:  
The Value Driven Continuum

**June 1 PMI-OC Scholarship**

Application deadline.  
[Click here for more information.](#)

*Coming events may be subject to change.*

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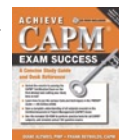
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## Answers to PMP® Exam

### Questions, from page 6

- 1. c.** Chapter 12, Section 12.1.1, Planning. The statement of work is an output of plan procurements.
- 2. b.** Chapter 2, Section 12.3, Framework. Outside vendors, unless specifically needed for the project, are not stakeholders.
- 3. b.** Chapter 4, Monitoring and Controlling. Although choice (a) is a good answer, the request should be submitted to the change control board. Choice (b) is a better answer.
- 4. b.** Chapter 5, Section 5.4.3, Monitoring and Controlling. Choice (a) is the purpose of control scope. Choice (c) is the purpose of verify scope. Choice (d) is the purpose of perform quality control.

# PMI-OC Dinner Meeting

## Tuesday, January 11, 2011

Program: **The Role of the PMO in Enabling Enterprise Success**

Presented by Steve Romero

[Click here to register.](#)

Location: **Wyndham Orange County Hotel**

3350 Avenue of the Arts, Costa Mesa, CA 92626

Schedule: 5:15 -6:00 p.m. Free resume reviews, courtesy of **Technisource**, for members in transition. *Please arrive early for a good spot in line.*

5:30 -9:00 p.m.

Socializing and networking, dinner meeting, and presentation

Cost: **Dinner and Presentation**

*In Advance:*

*At the Door:\**

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

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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 Monday, January 10, 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 two days before the event at [www.pmi-oc.org](http://www.pmi-oc.org). Anyone who cancels their reservation after 10:00 p.m. on Sunday, January 9, or anyone who makes a reservation and does not attend, will not receive any refunds.



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