PMI Portland Connection

December 2011

HQP2–The Port's View of the New Port of Portland Headquarters

In the Fall of 2004, the idea to develop the new Port of Portland Headquarters was hatched, gaining traction in 2005. The idea originally began as a solution to the organization's growing parking needs but quickly grew to capitalize on the opportunity to consolidate operations and create operational efficiency. The project cost approximately $238 million and involved thousands of people in some form or another. The end results were exactly what the Port of Portland wanted: more parking spaces and a more collaborative and productive work culture.

The finished Headquarters has a parking garage that holds 3500 cars, two pedestrian tunnels and two walkways. The 200,000 square foot building is situated on top of the parking garage. The interior looks like one long walkway with pockets of desks strategically organized by whichever workgroup works together, rather than by hierarchy of leadership. This setup allows the workgroups to more efficiently support one another. There are copious amounts of open spaces and no offices (a huge transition for the 40% who gave up an office during the transition). A special work group was formed to handle the cultural change. Surprisingly, it's a very quiet office with very little noise travelling anywhere. It provides a peaceful and harmonious work environment for all who work there.

The building is LEED (Leadership in Energy and Environmental Design) certified and is an exemplar of sustainable practices. It possesses features associated with a LEED certified building including recycled materials and recycled furniture. Aside from these standard LEED features, the new Headquarters

also possesses two unique features. It has a Living Machine® system, which is a large indoor garden that serves as an ecological wastewater treatment system, and an innovative ground source heating and cooling system, which provides the building with a renewable energy system and eliminates the need for fossil fuels.

There was no Project Management Office (PMO) when the project began; however, the Port of Portland did have a long-standing success rate at managing large projects and already had good processes in place. Although, there were still various approval gates, it was not as detailed as what would normally be required in a PMO. Most of the oversight for the project focused on financial factors. Midway during the project, a program manager was brought on, who later became the director that set up a PMO.

Tuesday, December 13 Chapter Meeting

Chapter Meeting Sponsor
CDI IT Solutions

CDI IT Solutions first expanded into Oregon in 1999 from the east coast, where the company has been entrenched since 1950. Over the past 12 years the local team has grown to more than 125 employees providing a myriad of solutions to clients.

CDI IT Solutions specializes in the management of engineering, application, help desk, and digital solutions. As a group of trained professionals CDI seamlessly integrates with its partners to deliver streamlined solutions, taking projects from inception to end of life.

For more information, visit www.cdi-its.com.

Keynote Presentation

Advancing the Project Management Profession, with John Patton, PMP

Read more...

Educational Presentation

Visually Manage the Five Steps of High Performance, with Tom Cox

Read more...

CDI® IT Solutions

Helping clients realize their vision through seamless digital solutions

Connect with CDI

CDI IT Solutions first expanded into Oregon in 1999 from the east coast, where the company has been entrenched since 1950. Over the past 12 years the local team has grown to more than 125 employees providing a myriad of solutions to clients.

CDI IT Solutions specializes in the management of engineering, application, help desk, and digital solutions. As a group of trained professionals CDI seamlessly integrates with its partners to deliver streamlined solutions, taking projects from inception to end of life.

General queries
DigitalSolutions@cdicorp.com

Recruiting
DigitalSolutionsJobs@cdicorp.com

Online
cdi-its.com OR cdicorp.com

Information Technology • Project Management • Managed Services • Web and Marketing Analysis • Content Management
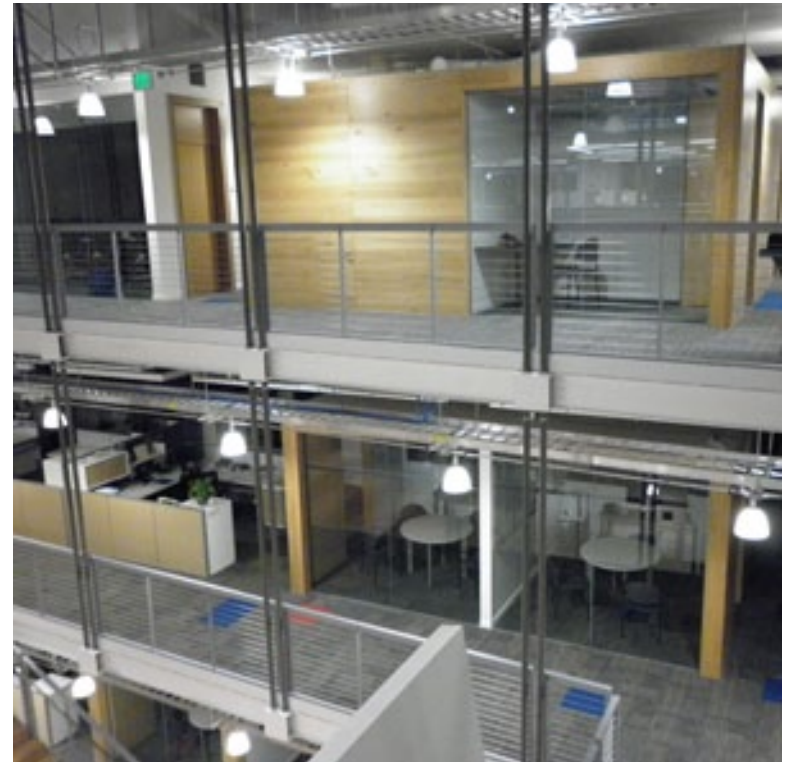
...Port of Portland Headquarters

Jane Yang interviewed Port of Portland Chief Engineer Tom Peterson, who was intimately involved in the overall project. This article is based on this interview.

A key management team with a key core team of approximately twenty people was formed to provide oversight responsibilities for the parking garage, maintenance crew, marketing and change management. Tom Peterson was one of the key management team that has been involved with the project from inception. Early on, he managed preliminary planning during stages when the idea was being researched further to determine if it was worth exploring. Later, he oversaw the executive team, including the primary program manager who reported to him and provided brief updates. He spent a short period as the acting program manager during a transition in leadership. Today, he is in a role where he is managing the final pieces of the closing phase, which includes collecting all necessary documentation and consolidating the operations manual for the technical center.

Peterson explained that all the typical phases of a project were used, such as initiating, planning and executing. There were many different stakeholders involved in different decision-making processes. For example, it was important that they had Federal Aviation Administration (FAA) oversight to ensure that impacts of areas such as safety and environment were understood. One knowledge area that was crucial was their contracting approach. It was important that it was a collaborative effort from the beginning -- team guiding principles were established early on and were continuously checked to make sure they were working. Peterson also explained the importance of penciling out the financial implications from the beginning.

One of the biggest challenges was people. The project impacted everyone, which made everyone a customer. This made it essential to have good change leadership. There was an emphasis on chartering team building, and these models were constantly checked to see if they were working or if they needed to be changed. Strong team building can also solve process issues because it aligns teams and addresses issues in a timely manner, helping to iron out issues early and avoid problems. A good communication plan was also necessary, and for this reason, their Public Affairs department was brought in early to handle communication to external and internal customers. Their Human Resources department managed change.

Office Space

...Port of Portland Headquarters

Common Area

Next month: The view from those who built HPQ2

Written by Jane Yang, Editorial Director, PMI Portland Chapter

Reception Area

Other risks and challenges included moving the IT Data Center. This was a huge project in itself, but yielded more efficient technology. They now have printing centers, where printing documents enter a queue which only prints off the document when an ID Card is scanned into any printer. This consolidated costs for printers. The Port also had to decide whether or not to self-insure. The aggressiveness of the schedule was also a challenge. Then there were budget challenges, safety, structural integrity, how to manage storm water and others. Many of these issues were solved with solid project management leadership.

When asked what important lessons were learned, Peterson responded, "make sure you utilize meetings to ask questions." It also would have helped if designs were available further along, but this probably couldn't have been avoided. His advice to others entering a similar project is to be sure you have the right makeup of people, and never underestimate the importance of team-building.

December Chapter Meeting Keynote Presentation

Advancing the Project Management Profession

Imagine a world …

• in which projects are the currency of learning in primary and secondary schools
• teachers value project management as a professional competency
• the accidental project manager is replaced by generations of students choosing project management as an education and career
• disaster and emergency management organizations, along with all other nonprofits, execute projects more effectively and thereby use donor dollars more efficiently

The presentation about your PMI Education Foundation will contain:

• Overview of the Foundation
• Overview of our K-12 Programs including the new PM for Youth Toolkit
• Overview of grants provided to schools and non-profits to build PM curriculum for K-12 teachers and non-profits
• Overview of academic scholarships and training scholarships for teachers and non-profits
• Overview of our non-profit programs
• Portland Chapter involvement
• Comments on how you can get involved

About the Presenter

John Patton is President and CEO of Cadence Management Corporation, a full service project management firm providing training, consulting and products to corporate customers. Some of the firm's well-known clients are: Logitech, Starbuck's Coffee, United Space Alliance (Space Shuttle), and eBay. John is best know for creating a practical, scalable methodology for getting projects done, applying the appropriate disciplines based on the size, risk and complexity of the project at hand.

John is well-known in project management circles around the world, speaking frequently to local chapters of PMI, presenting papers at congresses, and volunteering in support of the profession. He was one of a five person editorial team that earlier this year published (by PMI) Aspects of Complexity: Managing Projects in a Complex World. In addition, he has served on various academic advisory boards, currently serving as an advisor to the Department of Engineering and Technology Management, Portland State University. In 2011, John became a member of the Board of Directors for the PMI Education Foundation. Last week, he was elected Treasurer of the Board for the 2012 year.

In 2009, Cadence won the prestigious Provider of the Year Award from the Project Management Institute, the leading professional organization for project management. Cadence is one of 1300 Registered Education Providers with PMI, and ranks among the top companies in the world offering these services

John speaks Spanish, French, German and Catalan, and English. He has earned degrees from the University of Oregon (B.A. Romance Languages), University of Barcelona (Diploma, Estudios Hispánicos), and Portland State University (MBA).

December Chapter Meeting Educational Presentation

Visually Manage the Five Steps of High Performance

You'll get more done as a PM when you help your team Visually Manage the Five Steps of High Performance. As you know, visual management is a powerful technique that increases alignment, commitment, and follow-through.

During this demonstration, you will learn how you can provide simple visuals that give you and your project team better access to the Five Steps of High Performance.

Updated with recently published work on Visual Teams, this event will show you what the Five Steps to High Performance are, how to assess them in your team, and how to use simple visuals to boost them.

About the Presenter

Tom Cox is a successful consultant, author and speaker who coaches CEOs and Project Managers on how to get better results through more effective leadership. A graduate of the University of Chicago, Tom earned his four-year degree in psychology in just three years, with honors. For IBM, Tom once ran a program of 24 simultaneous projects–with zero staff–that finished early and under budget. Tom's internet radio program "Tom on Leadership" is a Top Five hit on Google. Tom has helped clients achieve results such as:

• For a security camera firm, tripling revenue in 3 months
• For a sales manager, increasing results-per-hour 250% in 2 months
• For a mental-health call center, growing profit from 1/2% to 8% in 6 months

Chapter Meeting Logistics

Agenda

4:00 Registration table opens
4:30 Educational presentation
5:30 Networking
5:35 New member welcome meeting
6:30 Dinner and announcements
7:00 Keynote presentation

Meeting Pricing

PMI Portland Chapter Members*
Keynote presentation with meal $25
Educational presentation $10

PMI Portland Chapter Student Members*
Keynote presentation with meal $15
Educational presentation $5

Non-Members
Keynote presentation with meal $35
Educational presentation $10

All
Keynote Presentation only, without meal $15

Late and walk-in registration is $10 more.

No refunds within 24 hours of the meeting.

* Chapter Members and Student Members must provide PMI number in order to receive member pricing, if registering at the door the day of the meeting.

* Chapter Members and Chapter Student Members are current members of PMI and the Portland Chapter. Student Membership is defined by PMI GOC, and does not apply to non-members who may be students.

PMI Portland Chapter Student Outreach Process

New Member Welcome Meeting

We meet directly after the Educational Presentation, in the same room. Join us to learn about who we are and what we offer, and to meet other new members.

Register Online and Save

At 10 a.m. the Monday before the Chapter meeting, the online registration price increases by $10. This increase is also in effect for walk-in registrations.

Register Now

Location

Doubletree Hotel–Lloyd Center
1000 NE Multnomah, Portland, Oregon 97232
(503) 281-6111
Free Parking

December Menu

House Brined Turkey Breast with Mashed Potatoes, Stuffing, Gravy and Vegetables

OR

Bronzed Tofu, Crisp Cabbage Slaw, Golden Balsamic, Organic Avocado Puree, Grilled Asparagus and Frizzled Sweet Potato

Pumpkin Spice Cheesecake

Professional Development

PMI—Agile Certified Practitioner (ACP) Exam Prep

**Thursday and Friday, Jan. 26–27, 2012
Two-days, 21 hours, homework required!**

Agile Certified Practitioner (ACP) is the newest certification from the Project Management Institute (PMI) and it "sets the bar" for agile project management professionals! Both the application process and the exam itself are rigorous.

This course will benefit anyone interested in agile project management methods. In fact, many Scrum Masters will discover the "Shu Ha Ri" theory from their CSM class is applied to real world implementation challenges in this class.

Seminar includes:

• ACP Exam Prep PLUS Desk Reference
• Two full-length ACP practice exams
• Six-month subscription to our Online Exam Simulator with over 1,000 questions
• The Agile Process Map™ and the Agile PM Processes Grid™
• Expert digests of Scrum, XP, TDD, Agile Modeling and more

Workshop Details

21 PDUs

Cost
PMI Portland Chapter members: super earlybird $1095, earlybird $1295, regular $1495

GR8 PMI
Traditional. Agile. Hybrid.

Presented by GR8 PM

Watch your email and the PMI Portland Chapter web site for complete details. Or email workshop@pmi-portland.org.

Events Calendar

MON	TUE	WED	THU	FRI	SAT / SUN
December 5	6	7 Roundtable NE @ Port of Portland	8	9 Roundtable NW @ Con-Way SAO Event	10 / 11
12	13 **Chapter Meeting**	14 PMI WV Salem Meeting OODN Event	15 Roundtable West @ Nike PMI WV Eugene Meeting	16 PMI WV Corvallis Meeting	17 / 18
19	20	21	22	23	24 / 25
26	27 Roundtable NE @ Public Health	28	29 Super Earlybird deadline–PMI-ACP Exam Prep	30	31 / 1
January 2	3	4 Roundtable NE @ Port of Portland	5	6 Roundtable South @ Mentor Graphics	7 Earlybird deadline PMI–ACP Exam Prep / 8
9	10	11	12 Roundtable West @ SolarWorld	13 Roundtable NW @ Con-Way	14 / 15
16 Earlybird deadline PMI–ACP Exam Prep	17 **Chapter Meeting**	18	19 Roundtable West @ Nike	20	21 / 22

For details, see the calendar on the Chapter web site.

PMI
PORTLAND CHAPTER

**Newsletter
December 2011**

Headline Article

Next Chapter Meeting
- Chapter Meeting Sponsor
- Keynote Presentation
- Educational Presentation
- Chapter Meeting Logistics

Professional Development
- PMI-Agile Certified Practitioner workshop

Chapter Activities
- Event Calendar
- Roundtable Meetings
- Project Management News Briefs

• Membership
- Join PMI Portland Chapter
- Become a Volunteer!
- Get to Know your PMI Portland Volunteers
- Membership News
- Photos

Articles
- Beyond the Voice of the Customer, part II
- A Chain is Only as Strong as its Weakest Link

PMI
- President's Letter
- Newsletter Director's Letter
- About PMI Portland

Web site: pmi-portland.org

Roundtable Meetings

Roundtable NW Con-Way

2055 NW Savier
Portland, OR

Ask for room at desk

2nd Friday 7:15 a.m.

Roundtable West SolarWorld

25300 NW Evergreen Rd.
Hillsboro, OR

2nd Thursday 5:30 p.m.

Dec. meeting canceled

Roundtable West Nike

Nike World Headquarters,
Beaverton, OR
Nolan Ryan Bldg.,
Air Huarache, 1st Floor

3rd Thursday 7:30 a.m.

Roundtable South Mentor Graphics

8005 SW Boeckman Rd.,
Wilsonville. OR
Commons Bldg., Big Muddy
Conf. Rm.

1st Friday 7:15 a.m.

Roundtable North Clark

1200 Fort Vancouver Way,
Vancouver, WA
Community Room

4th Friday 7:15 am
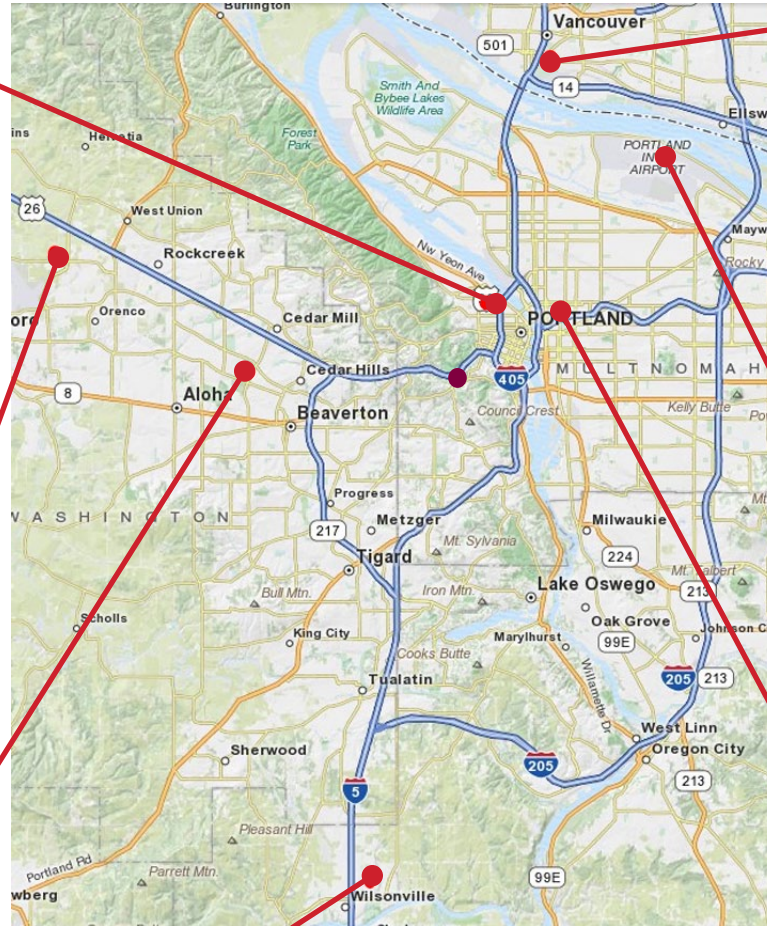
Roundtable NE Port of Portland

7200 NE Airport Way
Portland, OR
Anchor Rm., 1st floor

1st Wednesday 4:30 pm

Roundtable NE Public Health

Portland State Office Bldg.
800 NE Oregon Street,
Portland, OR
Room 1C-30

4th Tuesday 7:30 am

Join Us!

For more information, to see maps, to join a roundtable, to contact the moderator, or to RSVP for meetings, see the PMI Portland Chapter Roundtable web page.

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Project Management News Briefs

Mentoring Program Applications Due Now!

The Portland PMI Chapter's Mentoring Program is starting in January 2012. The team is planning events and meeting dates now, and wants to include everyone possible. The rewards are GREAT, with personal development and PDUs towards recertification. All Chapter members who want to be a mentee or mentor this session must submit their application **immediately**.

Applications are available here. Download and submit to mentoring@pmi-portland.org.

Keep your E-mail Address Current!

Members–we use your profile information from pmi.org. Please check your profile on the PMI Global site to be sure your email address is current– it will then be loaded into our database.

Non-members–you can log into the PMI Portland web site, go to My Profile, and change your email address here.

Roundtable and Job Posting members–remember that you may have set a different email address for these posts. Log in to the PMI Portland web site, go to My Profile, then My E-Lists to check the email address that is being used.

PMI Willamette Valley Chapter

Salem Branch Monthly Meeting

Special Date

Wednesday, December 14, 2011
Presentation starts at 12:00 p.m. (please arrive by 11:40 am)

Location

Roth's Conference Center in West Salem
1130 Wallace Rd. NW
Salem, Oregon 97304

Special Note: This will also be the Willamette Valley PMI Chapter Annual Meeting with Chapter Board Elections

Cost $15 (with lunch) or $12 (speaker only) for PMI Members and $17 (with lunch) or $14 (speaker only) for Non-Members

See website for more details Salem

Eugene Branch Monthly Meeting

Thursday, December 15, 2011
6:00-8:00 p.m.

Location

Red Lion—Eugene
205 Coburg Road
Eugene, OR 97401

Speaker Cheri Wilson

Topic EWEB Project Update: Walterville Canal Intake

Cost $20 (both PMI and Non-PMI members) Includes Dinner. A buffet-style dinner with water, coffee, tea, and dessert is prepared by Red Lion Hotel. If you require vegetarian, vegan, or other dietary requirements, please specify in the registration form or contact the VP Programs (VPPrograms@EugenePMI.org) 48 hours in advance of the meeting.

See website for more details Eugene

Corvallis Branch Monthly Meeting

Friday, December 16, 2011
Presentation starts at 12:00 p.m. (please arrive by 11:50 a.m.)

Location

Corvallis Depot
700 SW Washington Ave.
Corvallis OR 97333

Speaker Glenn Newkirk

Topic Risky Business: The Risk of Not Managing Risk

Cost $10 for PMI Members and students. $15 for non-PMI members. **NEW RATE** $5 for unemployed Project Managers.

See website for more details Corvallis

PMI
PORTLAND CHAPTER

...News Briefs

OODN Holiday Gathering

Annual Holiday Gathering
December 14, 2011
(Please Note Correct Date!)

It's that time of year again, and we're holding our annual holiday celebration for Oregon ODN members, their guests, and others who want to know more about OODN. Please join us! This is our special time to appreciate each other's company and make acquaintances–old and new.

Here are the particulars:

What? It will be a potluck affair. Here's how it works: Last names of A–H, bring entrees. Last names of I–P, bring salads or veggies. Last names of Q–Z bring desserts. Coffee, soft drinks, beer and wine will be available for purchase.

When? Wednesday, December 14th from 6–8:30 p.m.

Where? Beveland Street Coffee House, 7357 SW Beveland Rd., Portland, OR 97223.

RSVP to Jackie Barretta, president@odnoregon.org, by 12/12.

See you there!

Oregon OD Network
14780 SW Osprey Drive, Suite 365
Beaverton, OR 97007

info@odnoregon.org

www.odnoregon.org

Beveland Coffee House

SAO "Unconference"

Evolving Virtual Teams
December 9, 2011

Generally acknowledged best practices for software development strongly favor co-location, but with mergers, acquisitions, outsourcing, and off-shoring the co-located team is becoming an endangered species. Teams now are commonly project-based and geographically distributed. How can we work effectively with team members in different physical locations?

Learn from key open source leaders that with the help of virtual teams produce some of the highest quality, most widely used software today. Come prepared to speak your mind, share your experience, listen and learn about working in a virtual team. If you are involved anywhere in the software development lifecycle, this event is for you.

Who's working with virtual teams, and how well are they succeeding? We invite you to share your experiences and learn from others

Presented by the Quality Assurance Forum and Developers Forum.

When: Friday, December 9, 2011
8:00 a.m.–5:00 p.m.

Where: Multnomah Athletic Club

1849 SW Salmon Street, Portland, OR 97205

Contact: Ruth Fuller (ruth.fuller@sao.org)

Pricing: SAO members $55, Non-members $75

Register here.

For more information www.sao.org/

...News Briefs

Roeder Courses—Online, Live

Communicate with Competence & Confidence

Understanding how to communicate in a project setting is a vital skill for project managers and those who facilitate change. Developing and confidently communicating effective messages using written, verbal and visual forms is a key to obtaining results and your project success. In this workshop, we will help you understand how to more clearly and effectively communicate in project settings, leading to more successful change initiatives.

8 PDUs

Course Is Conducted In Two Half-Day Sessions (2 days, 4 hrs each)
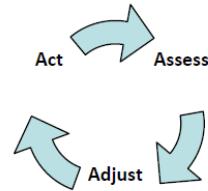
1:00 p.m.–5:00 p.m. (EST)

Day 1: Monday, January 10th, 2012
Day 2: Monday, January 17th, 2012

This course is conducted using live streaming video allowing for live interaction with course instructor. Please note this course is divided into two separate 4-hour sessions, separated by one week.

Non-PMI Member–$349
PMI Portland Chapter Member–$319

Dynamic Leadership Skills for Better Project Results

Leadership is one of the most important and determining factors in the success of any project. As Project Managers, Program Managers, and Business Analysts, we are viewed as leaders but often lack formal "position authority."

This course will help you understand power and influence and how to effectively lead your projects based on the situation.

8 PDUs

Course Is Conducted In Two Half-Day Sessions (2 days, 4 hrs each)
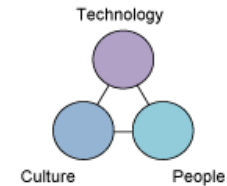
8:00 a.m.–12:00 p.m. (EST)

Day 1: Wed., December 7th, 2011
Day 2: Wed., December 14th, 2011

This course is conducted using live streaming video allowing for live interaction with course instructor. Please note this course is divided into two separate 4-hour sessions, separated by one week.

Non-PMI Member–$349
PMI Portland Chapter Member–$319

Managing Virtual Teams

More projects today are conducted in a virtual environment than ever before. Savvy project managers must understand how to succeed in a virtual environment when face-to-face meetings are becoming few and far between. In this course, learn how to lead your virtual teams to better outcomes when presented with the challenge of little or no in-person or team interaction.

8 PDUs

Course Is Conducted In Two Half-Day Sessions (2 days, 4hrs each)

10:00 am–2:00 p.m. (EST)

Day 1: Thursday, December 8th, 2011
Day 2: Thursday, December 15th, 2011

This course is conducted using live streaming video allowing for live interaction with course instructor. Please note this course is divided into two separate 4-hour sessions, separated by one week.

Non-PMI Member–$349
PMI Portland Chapter Member–$319

For more information, visit:
www.roederconsulting.com

...News Briefs

Roeder Courses—Online, Live

Project Management Fundamentals (NEW!)

It's no wonder in today's hectic business environment that you're suddenly managing stakeholder expectations, working on teams, worrying about budgets and planning schedules while being pulled in different directions. Your success is dependant on your ability to understand project management fundamentals and make them work for you.

In this course, you will be introduced to project management fundamentals laying a strong foundation from which to build upon. Less experienced project managers will walk away with a core set of tools to get started right away. More experienced project managers will also benefit from this program's cutting-edge science and ground-breaking principles. "Project Management Fundamentals" features a complete portfolio of accelerated learning techniques, including multimedia and exercises.

8 PDUs

Course Is Conducted In Two Half-Day Sessions (2 days, 4 hrs each)

10:00 am–2:00 p.m. (EST)

Day 1: Thursday, December 8th, 2011
Day 2: Thursday, December 15th, 2011

This course is conducted using live streaming video allowing for live interaction with course instructor. This course is divided into two separate 4-hour sessions, separated by one week.

Non-PMI Member–$349
PMI Portland Chapter Member–$319

For more information, visit:
www.roederconsulting.com

Free Webinar from Roeder Consulting

Project Negotiation Special Edition

Date: Tuesday, January 10, 2012

Time: 11 a.m. (EST)

Earn one PDU. Absolutely FREE!

You are invited to a special edition reality webinar. Roeder Consulting is devoting the full hour to project negotiation stories from the front line. All of us negotiate, but not all of us do it well. We'll share tremendous successes, monumental failures, and the lessons learned. We welcome you to share your story (big or small, success or failure) via the webinar registration page or Roeder Consulting's Group on LinkedIn. Story or not, please join us for an hour that's sure to be talked about.

Register now (http://www.roederconsulting.com/webinar.php) to reserve your seat. Seating is limited.

Job Opportunity

PM with Hardware Experience

Seeking a project manager who could do contract work for a diesel engine emission program. The company makes industrial vehicles. This project will run for a year. Experience running a product development project and experience with meeting regulatory requirements is preferred. Please contact:

Jeff Oltmann, Division of Management, Oregon Health and Science University, oltmannj@ohsu.edu

Synergy Professional Services, LLC–"the right projects–done right" (503) 644-6433   jeff@spspro.com   www.spspro.com
www.linkedin.com/in/jeffoltmann

Members–check out the Chapter Job Posting Service!

Recruiters–Post a Job!

Join the PMI Portland Chapter

PMI Portland Chapter is a local Chapter of the international organization, PMI (Project Management Institute). The PMI Portland Chapter prides itself on being an active and growing project management community and is one of the largest chapters in the Pacific Northwest.

How to Join

To become a member of the Portland Chapter, you must first join PMI Global. You can join online or download an application.

Click **here** to join PMI Global. You will be given an opportunity to join a chapter. Select the Portland Chapter (C031) from the list.

If you're already a PMI member and want to join the PMI Portland Chapter, you can renew using the link above.

We are honored to welcome you as a new member! You will begin receiving the benefits of membership right away!

Membership Benefits

- Network with Project Management Professionals
- Professional Development
- Discounts on Chapter Events
- Monthly Roundtables
- PMI Portland Chapter Monthly Newsletter
- Current Job Listings
- Volunteer Opportunities

Membership Costs

Join: PMI Membership costs $129/year. PMI Portland Chapter membership costs $25/year

Renew: PMI Membership renewal costs $119/year. PMI Portland Chapter membership renewal costs $25/year

Discounts: Retired members pay just $60 per year for PMI membership. Must be a PMI member in good standing for five consecutive years and have retired from active employment.

Students may join PMI for just $30 per year, plus a $10 application fee for new members. Membership is open to any student enrolled in a degree-granting program at an accredited, or global equivalent, college or university.

Test Drive a Membership

Would you like to come to a PMI Portland Chapter event to meet some of your fellow project management professionals and see what the Chapter is all about? You're welcome to attend, even as a non-member!

Get on our mailing list! PMI Portland members automatically receive e-mail announcements of all Chapter events and monthly newsletters–and you can too. If you would like to receive Chapter announcements and newsletters, fill out our Non-Member Sign up form.

For More Information

Please visit the PMI Portland Chapter web site. Read the Chapter brochure.

Become a Volunteer!

Grow your network and your skill set! These are some of the volunteer opportunities currently available:

- Assistant Director of Workshops–Professional Development team
- Document Management System Project Manager–Operations team
- Contact Management System Project Manager–Operations team
- Director of Technology–Operations team
- Quality Team Members (4)–Membership team
- Program Manager, Annual Survey–Membership team
- Instructor, Certification Prep course–Professional Development team
- Mentoring Program Administrator–Outreach team

For more information, go to the Volunteer Opportunities page n the Chapter web site, or contact our Director of Volunteers at volunteer@pmi-portland.org. You will be glad you did!

We Want to Profile Interesting Local Projects

Have you recently closed on a project in the Portland area that other PMI Portland Chapter members might be interested in hearing about? We are looking for stories about local projects. You don't even need to do the writing. We will interview you and capture the fascinating details that describe your methods, approach, outcomes and lessons learned. Final copy will be published in the PMI Portland Chapter newsletter.

Please let us know you are interested by sending a short note to newsletter_dir@pmi-portland.org.

Get to Know Your PMI Portland Volunteers

With a membership of over 1500 people, one of the goals of this newsletter is to get our members to know one another better.

Marketing

Laura Carspecken, Database Administrator

Laura Carspecken became PMI Portland's Database Administrator in September. Laura graduated this past May from the University of Portland with a degree in Operations and Technology Management and a minor in Spanish. She currently works as a Data Analyst at Con-way, where she interned her last semester of college. Laura is looking forward to being more involved with PMI Portland and hopes that one day she can use her project management skills to work and live in Asia. Laura can be reached at dbadmin@pmi-portland.org.

Professional Development

Shirley Briggs, Director of Workshops

Shirley Briggs is a Worldwide Launch Manager for Xerox Corporation focusing on the workgroup color printers. She enjoys leading global teams to improve communication and work processes to reach common goals. Her background includes Program Management of hardware and software systems.

Shirley holds a Bachelor of Science degree in Management and an MBA with a focus in Organizational Behavior from Marylhurst University in Oregon. She has also completed the PMP, CSM and Six Sigma Green Belt certifications.

Shirley has been working side-by-side with Kathy Stentz for about eight months now and will provide excellent service to the Chapter. Shirley can be reached at workshop@pmi-portland.org.

Membership

Matt Buchman, Project Manager for Membership Surveys

Matt Buchman, PMP has carved out a successful career managing once-in-their-lifetime projects. He has led diverse end-to-end projects including the review and organization of 5M document pages for an international litigation, legal IT installation worth $1.3M, upgrade for Opera IT with significant revision of practices, customer service for a national map franchise, and saving $500k in a 6-month Lean Manufacturing project for the NW's largest roof-and-floor truss manufacturer. He is currently a PM Customer Relations for the international legal services firm Epiq Systems in Beaverton and studying for his SME Lean Bronze certification. As Matt puts it, he is constantly amazed at what can be done with a degree in geophysics. He looks forward to teaching PMP course in the spring, hanging out with his wife, teasing his kid now in college, and writing novels.

In September, Matt joined the Quality Assurance team, focusing on member satisfaction surveys at the Portland Chapter meetings. Drawing on his professional experience and interest in survey data, Matt is a natural fit for this role. Bringing in his innate desire to help combined with steadfast follow-through, Matt always finds ways how to get things done. Never sitting still, Matt also presented at the PMI Bellingham Chapter (Oct. 2010) and gave an educational presentation at the PMI Portland Chapter meeting (June 2011). You can find Matt on LinkedIn, Amazon.com, or at the next Chapter meeting. Welcome and thank you Matt!

Membership News

Welcome New Members!

Blair, Chris	Nitchie, Mary Kay
Brayton, Darice	Nujetti, Prashanth
Briggs, Pam	Nyehart, Charles
Conley, Joy	Oistad, Jon
Feese, Rick	Patel, Avi
Foley, Susan	Pigion, Laura
Gustafson, Mollie	Ramsey, Douglas
Hogan, Kevin	Rezinas, Nedra
Jacobson, Carol	Scipio, Jeffrey
Jain, Divya	Sievers, Rebecca
Lepine, Bryan	Stearns, Charles
Livingston, Carol	Streger, Jennifer
Lorenzen, Tyler	Todd, Bernice
Lounsbury, Ryan	Updenkelder, Matthew
Mendenhall, John	Wahlstrom, Dan
Moore, Mark	

Congratulations New Credential Holders!

Arion, Emily, PMP	Martin, Sherrie, PMP
Feese, Rick, PMP	Stark, Nicholas, PMP
Hamel, Chad, PMP	

Membership information is provided to the Chapter monthly by PMI GOC. There may be a delay in seeing your name on this page due to newsletter publishing constraints.

Go to PMI GOC at www.pmi.org to change or manage your membership profile information.

Book Reviewer Needed!

The PMI Portland Chapter Newsletter would like to add a "Book Review" section.

If you (or someone you know) would like to volunteer to write a monthly (or just one) book review on Project Management or related subjects, please contact newsletter_dir@pmi-portland.org.

Photos from November Chapter Meeting

Alan John, President Elect

Debra Lavell, educational speaker

Paul Chirdon & Jeff Oltmann, keynote speaker

Many thanks to Laura Sakaguchi for the photos.

Volunteers

Networking

Educational presentation participants

Beyond the Voice of the Customer, Part II

In the first part of my article, if you missed it, I introduced the critical role of building a vital, active and ongoing (translate: real) relationship with the customer to ultimately deliver to them a superior experience. (See PMI Portland Chapter November 2011 newsletter)

In this brief article, I'll unpack this a bit more by suggesting five basic steps or stages to creating this understanding and connection with the customer. Not surprisingly they follow the same stages we all typically go through in developing a personal relationship with someone:

1. Introduction
2. Information
3. Interaction
4. Involvement
5. Identification

Introduction

We've just been introduced! We only understand them, if at all, at a very surface level. It's very understandable, we just haven't spent any time with them so we just don't know them very well. We base much of our interactions with them on the basis of generalization and speculation.

So, the first step is to clearly identify who your intended customers are, and conversely who aren't your customers. Don't settle for vague, ambiguous descriptions.

Information

Once we identify someone that we want to get to know we start to intentionally, consistently and actively find out more about them. What do they like/dislike? How do they spend their time? Who else do they know? Where did they grow up? They key here is to gain information that will help us understand and be able to relate to them better.

In this step we're deliberately establishing information channels from every functional area and contact we have with our intended customer customers, along with any and all third-party sources of information.

Interaction

OK, now we know a lot about them, but we really can't say we know them first-hand. In a personal relationship this comes from spending time, face-to-face. We start to gain insights into how they feel and think and most importantly how they relate to us and us to them. This isn't just a one-way conversation but a rich and real two-way dialog.

Now, we are engaging our customers in a rich and ongoing dialog that provides us insights beyond the basic who, what, where and when's about them. The key is face-time!

Involvement

When we reach this step with an individual, we are expressing a level of commitment to them that shows we are seriously committed to their improvement. We are expressing our commitment in very tangible ways that includes some level of risk and sacrifice on our part. This is a very critical stage in a relationship and only available to those that we want to be "serious" about.

We are now shifting our focus from engagement to involvement and the lines between the customer and us are beginning to be a bit blurred as we seek ways that we can closely partner with them for mutual benefit.

Identification

This final stage, which we never achieve perfectly, is a close and personal identification with them. We feel what they feel in similar situations; we anticipate needs before they are mentioned. In a way we "become" them–our motivations and goals are tightly aligned.

...Voice of the Customer, II

In this last stage, we "become the customer". We so closely identify with them that we are them, in a very real and tangible way and this allows us to provide highly innovative solutions– something others that are who are not at this stage can't do.

These are need easy steps to take as individuals, let alone as companies. However, those companies bold enough to embark on this journey will create superior value: first for the customer, then the employees and finally the investors.

About the Author

John Geffel, Managing Partner, founded VALUE:driven Group this year after 27 years at one of the software industry's leading vertical-market software companies, Timberline Corporation, that was acquired by Sage in 2003. John's particular expertise is in market development, product management, product marketing and strategic planning. He has been directly responsible for successfully introducing many industry-leading products and services over these years and most recently served as General Manager for the business.

John's focus at VALUE:driven is on customer value definition and value delivery assessment as well as providing oversight and account management for all of the company's engagements through its consulting alliance partners. John also leads the mentor/coaching program for the Oregon Entrepreneur's Network and provides executing coaching as a senior consultant at the Waldron Company.

John has a BS in Business Administration and an MBA from Portland State University.

A Chain is Only as Strong as Its Weakest Link

The Theory of Constraints (TOC) adopts the common idiom "A chain is no stronger than its weakest link" as a management paradigm. This means that business processes, organizations, systems, etc., are vulnerable because the weakest person, part or policy can constrain or at least adversely limit the outcome of the system.

The analytic approach using TOC comes from the contention that any manageable system is limited in achieving more of its goals by a very small number of constraints, and that there is always at least one gating constraint. Hence the TOC process seeks to identify the gating constraint for the business and restructure the rest of the organization around it, through the use of Five Focusing Steps.

The Five Focusing Steps

Theory of Constraints is based on the premise that the rate of goal achievement is limited by at least one constraining process. Only by increasing flow through the constraint can the overall throughput be increased. Assuming the goal of the organization has been articulated (e.g., "Make money now and in the future") the steps are:

1. Identify the constraint (the person, part or policy that prevents the organization from obtaining more of the goal)
2. Decide how to exploit the constraint (get the most capacity out of the constrained process)
3. Subordinate all other processes to above decision (align the whole system or organization to support the decision made above)
4. Elevate the constraint (make other major changes needed to break the constraint)
5. If, as a result of these steps, the constraint has moved, return to Step 1. Don't let inertia become the constraint.

The five focusing steps aim to ensure ongoing improvement efforts are centered around the organization's constraints. In the TOC literature, this is referred to as the "Process of Ongoing Improvement" (POOGI). These focusing steps are the key steps to developing the specific applications mentioned below.

Constraints

A constraint is anything that prevents the system from achieving more of its goal. There are many ways that constraints can show up, but a core principle within TOC is that there are not tens or hundreds of constraints. There is at least one and at most a few in any given system. Constraints can be internal or external to the system. An internal constraint is in evidence when the market demands more from the system than the system can deliver. If this is the case, then the focus of the organization should be on discovering that constraint and following the five focusing steps to open it up (and potentially remove it). An external constraint exists when the system can produce more than the market will bear. If this is the case, then the organization should focus on mechanisms to create more demand for its products or services.

Types of (internal) constraints

• Equipment or Parts: The way equipment is currently used or the availability of key parts limits the ability of the system to produce more salable goods/services.
• People: Lack of skilled people limits the system. Mental models ingrained in people can cause behavior that becomes a constraint.
• Policy: A written or unwritten policy prevents the system from making more.

The concept of the constraint in Theory of Constraints differs from the constraint that shows up in mathematical optimization. In TOC, the constraint is used as a focusing mechanism for managing the system. In optimization, the constraint is written into the mathematical expressions to limit the scope of the solution (X can be no greater than 5).

Please note: Organizations have many problems with equipment, parts, people, policies, etc. (A breakdown is just that–a breakdown–and is not a constraint in the true sense of

the TOC concept) The constraint is the thing that prevents the organization from getting more Throughput (typically, revenue through sales).

Buffers

Buffers are used throughout Theory of Constraints. They often used to EXPLOIT and SUBORDINATE the steps of the five focusing steps. Buffers are placed before the governing constraint, thus ensuring that the constraint is never starved. Buffers are also placed behind the constraint to prevent downstream failure to block the constraint's output. Buffers used in this way protect the constraint from variations in the rest of the system and should allow for normal variations in processing time and compensate for the occasional upset (Murphy) before and behind the constraint.

Buffers can represent the time it takes to replenish a bank of physical objects before a work center or a quantity of items in inventory waiting for shipment. These objects are usually waiting to be processed or picked by a work center. Buffers ultimately buy you time, as in the time before work reaches the constraint and are often verbalized as time buffers. There should always be enough (but not excessive) work in the time queue before the constraint and adequate off-loading space behind the constraint to reliably replenish the system.

Buffers are not the small queue of work that sits before every work center in a Kanban system although it is similar if you regard the assembly line as the governing constraint. A prerequisite in Theory of Constraints is that with one constraint in the system, all other parts of the system must have sufficient capacity to keep up with the work at the constraint and to catch up if time was lost. In a balanced line, as espoused by Kanban, when one work center goes down for a period longer than the buffer allows, then the entire system must wait until that work center is restored. In a TOC system, the only situation where work is in danger, is if the constraint is unable to process (either due to malfunction, sickness or a "hole" in the buffer–if something goes wrong that the time buffer can not protect).

Buffer management therefore represents a crucial attribute of the Theory of Constraints. There are many ways to do it, but the most often used is a visual system of designating the buffers in three colors: Green (OK), Yellow (Caution) and Red (Action required). Creating this kind of visibility enables the system as a whole to align and thus subordinate to the need of the constraint in a holistic manner. This buffer status can be displayed in a central operations room or on a web site that is accessible to all concerned.

Supply Chain / Logistics

In general, the solution for supply chains is to create a flow of inventory so as to ensure greater availability and to eliminate surpluses or stock outs.

The TOC distribution solution is effective when used to address a single link in the supply chain and more so across the entire system, even if that system comprises many different companies. The purpose of the TOC distribution solution is to establish a decisive and competitive edge based on extraordinary availability by **dramatically reducing the damages caused** when the flow of goods is interrupted by shortages and surpluses. This approach uses several new rules to protect availability with less inventory (25%–75%) than that conventionally required in min/max implementations.

Note: Before explaining these new rules, the term Replenishment Time must be defined. Replenishment Time (RT) is the sum of the delay, after the first consumption following a delivery, before an order is placed plus the delay after the order is placed until the ordered goods arrive at the ordering location.

Rule 1: Inventory is held at aggregation point(s) as close as possible to the source. This approach ensures smoothed demand at the aggregation point, requiring proportionally less inventory. The distribution centers holding the aggregated stock are able to ship goods downstream to the next link in the supply chain much more quickly than a make-to-order manufacturer can. Following this rule may result in a make-to-

...Weakest Link

order manufacturer converting to make-to-stock. The inventory added at the aggregation point is significantly less than the total inventory reduction downstream.

Rule 2: In all stocking locations, initial inventory buffers are set which effectively create an upper limit of the inventory at that location. The buffer size is equal to the maximum expected consumption within the average RT, plus additional stock to protect in case a delivery is late. In other words, there is no advantage in holding more inventory in a location than the amount that might be consumed before more could be ordered and received. Typically, the sum of the on hand value of such buffers are **25–75% less than currently observed average inventory levels.**

Rule 3: Once buffers have been established, no replenishment orders are placed as long as the quantity inbound (already ordered but not yet received) plus the quantity on hand are equal to or greater than the buffer size. Following this rule causes surplus inventory to be bled off as it is consumed.

Rule 4: For any reason, when on hand plus inbound inventory is less than the buffer, orders are placed as soon as practical to increase the inbound inventory so that the relationship On Hand + Inbound = Buffer is maintained.

Rule 5: To ensure buffers remain correctly sized even with changes in the rates of demand and replenishment, a simple recursive algorithm called Buffer Management is used. When the on hand inventory level is in the upper third of the buffer for a full RT, the buffer is reduced by one third (and don't forget Rule 3). Alternatively, when the on hand inventory is in the bottom one third of the buffer for too long, the buffer in increased by one third (and don't forget rule 4). The definition of "too long" may be changed depending on required service levels, however, a general rule of thumb is 20% of the RT. Moving buffers up more readily than down is supported by the usually greater damage caused by shortages (lost sales) as compared to the damage caused by surpluses (discounted sales).

Once inventory is managed as described above, continuous efforts should be undertaken to reduce RT, late deliveries, supplier minimum order quantities (both per SKU and per order) and customer order batching. Any improvements in these areas will automatically improve both availability and inventory turns, thanks to the adaptive nature of Buffer Management.

A stocking location that manages inventory according to TOC should help a non-TOC customer (downstream link in a supply chain, whether internal or external) manage their inventory according to the TOC process. This type of help can take the form of a Vendor Managed Inventory (VMI). The TOC distribution link simply extends its buffer sizing and management techniques to its customers' inventories. Doing so has the effect of smoothing the demand from the customer and reducing order sizes per SKU. VMI results in better availability and inventory turns for both supplier and customer. More than that, the benefits to the non-TOC customers are sufficient to meet the purpose of capitalizing on the decisive competitive edge by giving the customer a powerful reason to be more loyal and give more business to the upstream link. When the end consumers buy more the whole supply chain sells more.

One caveat should be considered. Initially and only temporarily, the supply chain or a specific link may sell less as the surplus inventory in the system is sold. However, immediate sales lift due to improved availability is a countervailing factor. The current levels of surpluses and shortages make each case different.

Paul Chirdon, PMP (pchirdon@comcast.net) is a Senior IT Project Manager who is a program/project manager trained in helping companies improve weak business processes by applying the "Theory of Constraints" to determine Lean and Six Sigma improvements. Paul is knowledgeable in all front and back office business functions within the Manufacturing Sector that includes Semiconductor, Biomedical (FDA, HIPAA regulations), Automotive, Transportation and Retail Footwear companies.

President's Letter

Happy Holidays !

As the 2011 comes to an end, being the sentimentalist that I am, I have been reflecting on the past year. There have been a lot of challenges and accomplishments to look back on: Our new Board has transitioned, the web site has been updated, the Managing Projects, Programs & Portfolios event was a great success, and the Chapter topped 1,500 members.

Present in my thoughts above all other things for this year are the group of volunteers that support us. We are fortunate to have many talented and dedicated people who work very hard to keep this Chapter going. If you have a chance, please reach out and thank a volunteer at the next Chapter function you attend. They do what they do because they care very much for our organization, and have given so much to us over the year they deserve our gratitude.

I hope you all have a safe and happy holiday season, and look forward to seeing you at the December 13th Chapter Dinner!

Steve Thornton
President, PMI Portland Chapter

Thought for the Month

"We make a living by what we get, but we make a life by what we give."

—*Winston Churchill*

Newsletter Director's Letter

Thanks For Your Response

First, I would like to thank those who took the newsletter survey. It has given us insight on what is wanted in the newsletter.

I am always open to any feedback, suggestions or submissions to the newsletter. You can contact me by e-mail, newsletter_dir@pmi-portland.org. Remember, this is YOUR newsletter.

Laura Sakaguchi, CAPM
Newsletter Director

PORTLAND CHAPTER

**Newsletter
December 2011**

Headline Article

Next Chapter Meeting

- Chapter Meeting Sponsor
- Keynote Presentation
- Educational Presentation
- Chapter Meeting Logistics

Professional Development

- PMI-Agile Certified Practitioner workshop

Chapter Activities

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•Membership

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- Become a Volunteer!
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- Photos

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- A Chain is Only as Strong as its Weakest Link

PMI

- President's Letter
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PORTLAND CHAPTER

Newsletter
December 2011

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Board of Directors

The Board of Directors wants to hear from you. Click on the link to send them an email.

President Steve Thornton
president@pmi-portland.org

President Elect Alan John, PMP
presidentelect@pmi-portland.org

Secretary Shancy Saban
secretary@pmi-portland.org

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Sponsor an event

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Speak at an event

If you would like to speak at a Chapter meeting contact speaker@pmi-portland.org. If you would like to present a workshop for the PMI Portland Chapter, contact workshop@pmi-portland.org.

Submit an article

Write an article or book review for the newsletter. You can earn PDUs! Click here for details or contact newsletter@pmi-portland.org.

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Mission

To promote the profession of Project Management by creating a culture and community that facilitates professional growth through education and volunteerism.

Vision

To be the innovative leader in the region for advancing project management, making individuals and organizations more successful. We are a responsive and collaborative center of excellence promoting ethics, quality, knowledge, skills, integrity, and leadership.