



**Building Professionalism  
in Project Management™**  
Project Management Institute

**Central Mass Chapter Newsletter**

January 2008  
Volume 8 Issue 1

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### Next Chapter Meeting

**Resource Planning: The  
Missing Element In Portfolio  
Management**

February 12, 2008

### A Note From Our President

## Welcoming the New Year

*by Ed Yee, PMP*

As the Chapter grows from its original 40 members to near 500, our newly elected President reflects on the events and great success of 2007 as we plan for 2008 and the fifth anniversary of the Chapter. See what is planned for this year and what challenges are being undertaken by the Chapter.

[full article](#)

### Global Knowledge

## 10 Quick and Easy Ways to Earn PDUs for Re-Certification

*Originally published in Global Knowledge 's Business Brief e-newsletter*

For all of you for which 2008 is the year to renew your PMP certification, here are 10 quick ways to identify sources of additional PDU credit you may not have realized. [Let us know](#) if you think of other places that might be useful to other members and we will publish in a future newsletter.

[full article](#)

### Next Chapter Meeting - February 12

## Resource Planning: The Missing Element In Portfolio Management

*presented by Velociteach*

At the next Chapter meeting, Peter Heinrich who is the CEO of Portfolio Decisionware, will present on the role and the relationships of the resource manager in an effective portfolio management process. He states that not enough attention has been paid to the role of the line (resource or

### Meet the Board

#### President

Ed Yee, PMP

#### Vice President

Alice Thayer, PMP

#### Treasurer

Debra Wallace, PMP

#### Secretary

Jeanne Talatinian, PMP

#### Meetings & Events

Steve Tolf, PMP, Dir

Bob Brown, PMP, Asst Dir

#### Training

Rowena Sy-Santos, PMP, Dir

#### Sponsorship

Dick Kennedy, Dir

#### Programs

Gulshan Longani, PMP, Dir

#### Marketing

Gail Greenburg, Dir

#### Communications

Dan Thompson, PMP, Dir

Steve Forde, PMP, Asst Dir

#### Membership & Volunteers

Debra Trainor, PMP, Dir

Dana Black, PMP, Asst Dir

Sethu Sekhar, PMP, Asst Dir

#### Information Technology

Steve Forde, PMP, Dir

#### Newsletter Editor

Dan Thompson, PMP

#### Past President

Barbara Karten, PMP

5:30 - 8:30 PM  
Doubletree Hotel Westborough  
[Register](#)

### Write For Us

The PMICmass newsletter is always looking for great articles to publish. If you have a great project story to tell or a new and interesting technique that worked on a project, let us know.

[Email](#) or attend one of our chapter meetings. If your article is published, you can also earn PDUs.

### Upcoming Events

- [Seminar at Sea](#)  
August 14 to 18, 2008  
St. John, New Brunswick  
Registration open: 9/1/07
- [The Southern New England Chapter](#)
- [Champlain Valley PMI Chapter](#)
- [Mass Bay Chapter](#)
- [Maine Chapter](#)
- [Rhode Island Chapter](#)
- [New Hampshire Chapter](#)
- [Keene, NH Greater Monadnock Chapter](#)

functional) manager in the product development life cycle process.

Peter has a long history in technology product development and management process implementation, including a 20 yr career with Xerox. Based on his experience with corporations large and small, Peter designed the portfolio resource planning and management process that is instantiated in Portfolio DecisionWare's products.

[more info](#) | [registration](#)

### Special Event - March 29th

#### Neal Whitten's No-Nonsense Advice for Successful Projects

On March 29th, Neil Whitten will be presenting a 7-PDU event that takes leadership and project management to a personal level by revealing leading-edge practices that make all the difference between leading consistently successful projects and playing the victim with troubled projects.

The event runs from 8 AM to 4:30 PM and will be held at The Campus at Marlborough. The event costs \$250 for non-Chapter members and \$225 for Chapter members. The fee covers the seminar, materials, breakfast, lunch and a copy of "Neal Whitten's No-Nonsense Advice for Successful Projects".

[more info](#) | [registration](#)

#### MetSIG PMO Series Webinars now available

The Central Massachusetts Chapter has partnered with the MetSIG to allow you access to FREE live and archived webinars! MetSIG Chair Steve Rollins, PMP will be delivering a series of 10 live, one-hour webinars on the topic of "PMO and the Portfolio: Measuring Towards Value." These webinars are free for Chapter members. A required passcode has been distributed to all members by email. If complete a survey for each webinar you view, the MetSIG will report the PDUs for you.

[more info](#)

#### New Chapter Members This Quarter

In this quarter, 33 new members have joined the Chapter. We are very close to reaching 500 members in time for our fifth anniversary.

[full article](#)

### Chapter Report

#### CMASS Chapter Financial Health

*by Debra Wallace, MBA, PMP, Chapter Treasurer*

Sue Bause, PMP

### Jobs at PMICMass

A free service of our chapter, our Jobs distribution list allows employers to access our group of skilled project management professionals.

If you have project management openings at your organization, email the information to [jobs@pmicmass.com](mailto:jobs@pmicmass.com) for distribution to our list.

### Volunteer with Us

Get involved! Volunteering with us is a great way to make contacts in the field, take on projects you care about, and further your career. Send us an [email](#) or attend one of our chapter meetings. Thanks!

Deb Wallace discusses the purpose and mission of the chapter and how monthly the Board evaluates our financial health. Thankfully, we are meeting all of our goals and the chapter is in great shape.

[full article](#)

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#### [Membership Report](#)

### **2007 - A Great Year for PMICmass**

*by Debra Trainor, PMP*

As we approach our fifth anniversary, Deb looks at where we were just one year ago and reflects on how much has changed and how much we have grown in comparison to our peer chapters.

[full article](#)

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### **Welcome to the New Board Members**

In November, the Board elected its new slate of Officers for the year. Alice Thayer, the former Director of Communications, was elected Vice-President. And our incumbent Treasurer, Debra Wallace, was re-elected to serve an additional term.

[full article](#)

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#### [Event Update](#)

### **Advanced Techniques for Managing Project Progress**

*by Alice Thayer, PMP*

On November 17, 2007, the Chapter hosted another great seminar by David Crane. Thirty attendees enjoyed the six PDU event. David provided tools to take project progress management beyond the traditional. Participants learned several new ways to use MS Project.

[full article](#)

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#### [Event Update](#)

### **A Taste of PMI Boot-Camp:**

### **The Way It Was at the Atlanta Leader Institute Meeting**

*by Ed Yee, PMP, Deb Wallace, PMP, and Rowena Sy-Santos, PMP*

Three members of our Chapter had the opportunity to travel to Atlanta and attend PMI's national leader training conference. Through many long days

and nights, Ed, Deb, and Rowena met many new contacts, learned lots of best practices and gained tremendous knowledge that they will be sharing with us and using to make the Chapter stronger.

[full article](#)

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## **PMI Global Standards, Exposure Drafts Available for Review**

*by Barbara Karten, PMP*

Each year, PMI releases a set of exposure drafts that are updates to existing standards and possible new standards. This is a great resource for members to contribute back to the community by reviewing these documents and staying current on new thinking from the Institute.

[full article](#)

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## Welcoming the New Year

*by Ed Yee, PMP*

As your newly-elected PMI Central Massachusetts Chapter president, I and my fellow chapter board members would like to join in wishing you and all your families, a happy, healthy and successful New Year. Let this year be a time for even more of your co-workers to join the Chapter and become actively involved in this rapidly growing group.

- [CMASS Chapter Financial Health](#)
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- [New PMI Global Standards](#)

## Next Chapter Meeting

### **Resource Planning: The Missing Element In Portfolio Management**

February 12, 2008

5:30 - 8:30 PM

Doubletree Hotel Westborough  
[Register](#)

Who could have imagined, back in April 2004, that the 40 founding members would have grown to almost 500 today? By the way, did you know that we have more than 300 chapter members with PMP certification, a significant percentage of our membership? We also have one of the first PMI PgMP's in our ranks and a CAPM. As we celebrate the chapter's Fifth Anniversary this year, lets make this a banner year.

Our well planned 2007 program of informative chapter meetings and training events have been extraordinarily well-attended with the result that membership is growing dramatically. We have also built a healthy financial reserve to support our growth into the future. The board members and I will, with your help, continue to provide strong leadership for 2008.

We are working constantly with our very active membership to broaden our meetings and events in this coming year. We need to expand our reach into the business community, offer volunteer leadership opportunities, and promote our project management profession. So why don't you make 2008 the year that you will participate in chapter activities?

I did just that, back in 2004. Since then, I have served as Assistant Director of Meetings and Events, Treasurer, Vice-President, and now as your President. Not only was I able to contribute much to those positions but you can bet I also learned a great deal from the monthly meetings and events with my fellow

professionals.

With my warmest personal regards,

Ed Yee

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Global Knowledge

## 10 Quick and Easy Ways to Earn PDUs for Re-Certification

*Originally published in Global Knowledge 's Business Brief e-newsletter*

If you're like most project managers, the daily business of business often keeps you too busy to worry about maintaining your skills. But one of the requirements of PMP certification is to earn Professional

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Development Units (PDUs) to prove that you're constantly improving.

So, how do you balance working a full-time job with earning 20 PDUs a year - while maintaining some semblance of a real life? Here are 10 of our favorite ideas to get you started.

1. Provide project management services to a community group or charity - 5 PDUs per year
2. Write an article on project and/or program management and get it published - up to 30 PDUs, depending on the publisher
3. Attend project management training courses - 1 PDU for each class hour
4. Attend one of Global Knowledge's free webinars - 1 PDU for each webinar
5. Serve on a project management panel discussion at a conference or symposium - 5 PDUs
6. Get involved with your local PMI Chapter
  - o Serve on a committee for at least 3 months - 1 PDU
  - o Serve 6 months - 3 PDUs
  - o Serve 12 months - 5 PDUs
7. Get REALLY involved with your local PMI Chapter
  - o Serve as an elected officer for at least 3 months - 2 PDUs
  - o Serve 6 months - 5 PDUs
  - o Serve 12 months - 10 PDUs
8. Self-directed learning such as discussions or coaching sessions, or reading articles, books, instructional

- manuals, videos, CD-ROMs, or other material resources – 15 PDUs
9. Speak at your local PMI chapter meeting – 5 PDUs
  10. Speak at a project management conference or course – 10 PDUs

And to help you out even more, here's a bonus idea:

The Global Knowledge PMP Renewal Subscription gives you access to up to 92 PDUs every year through online short courses you can access anywhere you have a computer. Only need one or two PDUs? Each webinar and course is also available for sale individually.

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This article was originally published in Global Knowledge's Business Brief e-newsletter. Global Knowledge ([www.globalknowledge.com/PMILocal](http://www.globalknowledge.com/PMILocal)) delivers comprehensive hands-on project management, business process, and professional skills training. Visit our online Knowledge Center for free white papers, webinars, and more.

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## New Members this Quarter

In the past three months, many new members have joined the chapter.

### October

- Irene Berner
- Orla Daly
- Matthew Davis, PMP
- Paul Duncan
- Colin Hassett
- Brian Jackson, PMP
- Shabtai Lerner, PMP

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- Linda Marchi
- Lydia Milne, PMP
- Liana Pernes-Muthig, PMP
- Sandra Roth
- Sethu Sekhar, PMP
- Everett Testa, PMP
- Lynda Zorn

### November

- Mary Algeo
- Michael Corby, PMP
- John Doucette
- Michael Geoffroy
- Gail Greenberg
- Daniel Harp, PMP
- Dhananjay Nagarkar
- Abigail Nortey
- Julie Paradise, PMP
- Kerry Quick
- Paul Szulewski, PMP

### December

- Mary Irons, PMP
- Dave McKenna
- Paul Moruzzi
- Stephen Oxenden
- FNU Pham
- Debra Pirrotta
- Anthony Richard
- Bruno Roberge





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**CMASS Chapter Financial Health**

*by Debra Wallace, MBA, PMP, Chapter Treasurer*

Welcome to a new Newsletter feature: CMASS Chapter Financial Health, an article designed to provide financial education and a health-check on the Central Massachusetts Chapter of PMI (CMASS).

**A little history...**

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Chartered in 2003 as a non-profit chapter of the international parent organization, the Project Management Institute (PMI), CMASS has defined the purpose or mission of the organization as:

To promote the value and practice of project management by advancing standards, providing a forum for disseminating best practices information, and sponsoring professional development opportunities.

### How does CMASS advance the mission?

The Chapter Board of Directors (BOD) meets annually to identify the strategic initiatives to support the chapter mission, defines a tactical approach and assesses the resources, including financial resources, required to implement the initiative, and monitor the progress and results of the initiative. (Sounds like best practices!)

### How do we assess our chapter health?

Monthly, the Chapter BOD monitors the following four (4) financial metrics:

- Chapter Membership
- Chapter Meeting Attendance
- Special Event Attendance
- Net Income

Additionally, the BOD reviews the following non-financial inputs:

- Level of Volunteerism
- Level of Member Satisfaction recorded on meeting and event evaluations

As your Treasurer, I am pleased to inform you that the Chapter has demonstrated steady growth on all metrics, e.g., membership, meeting and event attendance, and net income. The Chapter is well positioned to enhance current operations and support new strategic initiatives.

Stay tuned to Chapter Financial Health. In our next issue, the CMASS Chapter metric performance will be quantified for 2007!

**Questions or Comments?**

Please submit your questions or comments to [Treasurer@pmicmass.com](mailto:Treasurer@pmicmass.com), or speak to me at the monthly chapter meetings.

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### Next Chapter Meeting

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### Membership Report

## 2007 — A Great Year for PMI Central Mass Chapter!

by Debra Trainor, PMP

2007 has been an exciting year for the chapter membership and for volunteers! The growth of the Central Mass chapter is phenomenal — we are now almost at 500 members. Last year at this time the membership was 421. As of November, we added 177 new members! The graph below shows our monthly growth over the last 12 months.

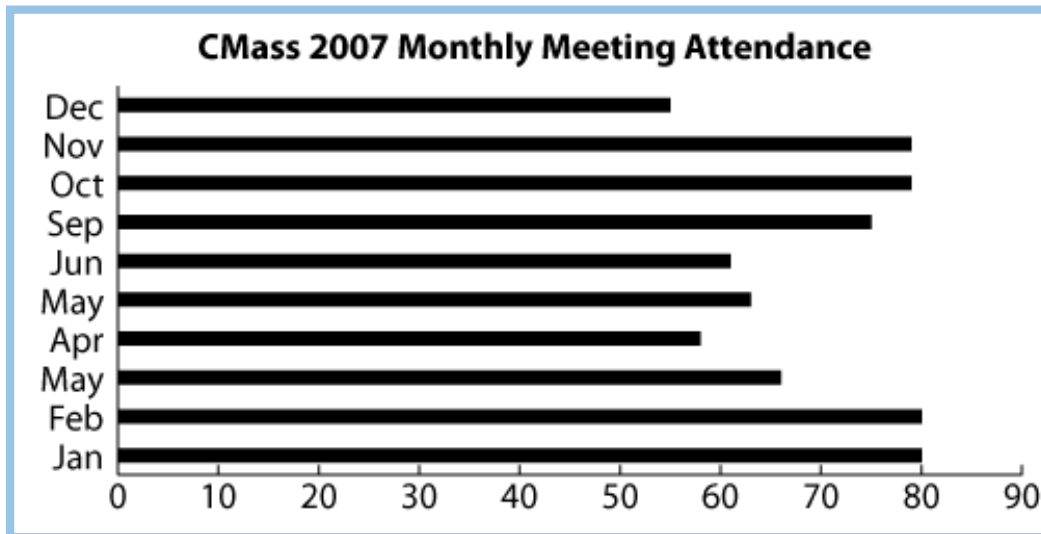


Look at the table of stats from the PMI central HQ. Central Mass has:

- better than average growth for Region 3 (R3)
- 2nd highest growth of any R3 chapter (not shown)
- most growth of any R3 US chapter

Chapter / Membership	as of Dec 2006	as of Nov 2007	Net Change	Growth %
Region 3 US Chapters	5,426	5,779	353	6%
<b>Central Mass</b>	<b>421</b>	<b>491</b>	<b>70</b>	<b>17%</b>
New Hampshire	361	392	31	9%
Mass Bay	2,093	2,239	146	7%
Southern NE	1,633	1,733	100	6%
Ocean State	486	499	13	3%
Maine	204	208	4	2%
Champlain Valley, VT	165	158	(7)	-4%
Keane, NH	63	59	(4)	-6%

And yes, you're right — it is getting more crowded at the meetings! The word is out that the CMass chapter is friendly, meetings are accessible and interesting and the cookies are good. We sponsored some seasoned PMI speakers and also some new faces. The attendance has grown steadily over the year to max at 80+ attendees at January monthly meeting. The graph below shows our monthly meeting attendance (note no meetings in July, August).



The CMass chapter sponsored 5 special events and the turnout was always better than we expected!

- Two Microsoft Project 1 day classes with David Crane
- Christa McAuliffe Space Center Training
- PMP Prep course
- Free Met Sig Webinars

Please let your Board members know if there is something you want us to look into as an event for the membership. Let us know if you want us to repeat any of these events.

Many new member volunteers came forward in 2007. Elaine Jackson helped to get some "CMass" logo stickies and Gail Greenberg set up the layout for the upcoming brochure. Diane Crone did some analysis of the membership database which we will use to plan monthly meeting topics. Joes Neas helped identify towns and potential new members working with Barb Karten on the zip code project. Bob Brown has volunteered to take care of the audio/visual equipment with Steve Tolf, and is now the Asst. Director of Meetings and Events. Dan Thompson came forward as Newsletter editor and ended up becoming the Director of Communications as well. This shows that you too can do a little or a lot for your chapter. It all makes a difference.

In 2008, we look forward to more membership growth, more activities, and sharing more knowledge with each other. Thanks for being here with us!

See you at the next meeting!

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## **New Members Join the Board of PMICmass**

At the November 13, 2007 meeting, chapter elections were held. This is an annual process for four positions on the board: President, Vice-President, Secretary, and Treasurer. The Vice-President from one year becomes the President the following year. Ed Yee was the Vice-President in 2007 and will be the President for 2008. Jeanne Talatinian was elected in 2006 to a 2 year position as Recording Secretary. Elections were held for

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Vice-President where Alice Thayer was elected for 2008. She will become President in 2009. Also elected was the Treasurer position where Debra Wallace was re-elected to that position.

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**Alice Thayer, PMP** has been named as Vice-President of the Board. Alice has been a chapter member of the Central Mass Chapter of PMI since 2005 and has served as the Director of Communications for the past two years. In that role she has been responsible for the chapter communications, including monthly meeting notices, event notifications, and job opportunities. During that time she expanded the communications to include events run by the other chapters of the New England Collaborative and related organizations. She is the Central Mass chapter representative to the New England Collaborative (NEC). The NEC has representatives from all the New England chapters and promotes communication and exchange of ideas and events among the chapters.

As VP, she has promised to continue to contribute to the leadership of the chapter as it approaches its five-year anniversary and membership levels grow beyond the 500 member milestone. Based on her past experience as Director of Communications, she has demonstrated her effectiveness working with the Board and chapter members in support of the chapter's initiatives.

Alice is a project management consultant for

TEKsystems working at one of their healthcare clients in Newton. She has worked at The Hanover Insurance Group, Blue Cross Blue Shield of Massachusetts, and Digital Equipment. Her expertise is in project management, business process improvement, and finance/accounting. She has led several successful process improvement initiatives and system projects, including Ariba, Hyperion, and PeopleSoft. Alice also has finance and accounting management experience in general and cost accounting, financial planning and analysis, budgeting, and Internal Audit. Alice has her PMP certification and is Six Sigma Green Belt certified. She holds a BS in Accounting from Bentley College and a MBA from Northeastern University. She also has certificate in Health Management from Northeastern University and a HIAA designation of Managed Health Professional (MHP).

Alice lives in Harvard with her family. Her interests include antiques, photography, and showing her dogs (Keeshonden) Miss Molly and Skippy in Rally Obedience and Agility competition.

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**Debra A. Wallace, PMP** is the current treasurer and will continue as such. As the incumbent Treasurer, Ms. Wallace has significant knowledge of the finances, policies and procedures and controls specific to the CMASS Chapter and those necessary to support excellence in fiduciary management. Her ability to contribute to the financial growth and management of the organization

stems from extensive corporate finance experience as well as training in PMI specific financial management. During the past year, she has endeavored to support to the best of her ability the budgeting, expenditures and financial reporting of the organization as well as expand the financial policies and procedures required by a growing organization. A recent peer audit of the chapter finances found the books to be accurately stated with adequate controls in place.

Ms. Wallace is a project manager in the Process Management Department at Fallon Community Health Plan, Worcester, MA. Since joining FCHP, she has been responsible for the design of new or the improvement of current business processes associated with the Care Services Division. Ms. Wallace earned a BA in Economics from Colby College and is a graduate of Northeastern University's MBA program. She began her career as a financial analyst at Digital Equipment Corporation. Providing financial services to various business units, she was responsible for developing annual budgets, monitoring expenditures, forecasting and reporting. After a six year sabbatical to raise three children, Ms. Wallace resumed her career as the IT Business and Finance Manager at the University of Massachusetts Medical School. Promoted to Project Manager, Ms Wallace served as a project manager for IT application development and Commonwealth Medicine healthcare programs.

An avid musician, Ms. Wallace sings in her church choir, and with the Assabet Valley Mastersingers and Assabet Valley Chambersingers. She serves on the Board of Directors for the Assabet Valley Mastersingers as their Development Chair. Ms. Wallace, her husband and children reside in Boylston, MA.

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**Advanced Techniques for  
Managing Project Progress  
with MS Project**

*by Alice Thayer, PMP*

On November 17, 2007, the Chapter hosted a seminar by David Crane entitled "Advanced Techniques for Managing Project Progress with Microsoft Project". Thirty attendees enjoyed the six PDU event at the Best Western Royal Plaza in Marlboro. David Crane delivered another great Saturday session

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using MS Project to take project progress management beyond the traditional "it's about 80% done" status. He made us "think outside the box" by walking through alternative Earned Value applications and sharing a few new ways to look at resource schedules. David also left us with several new ideas on how to better utilize MS Project.

## Next Chapter Meeting

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- [CMASS Chapter Financial Health](#)
- [2007 - A Great Year for PMICmass](#)
- [New Board Member Information](#)
- [MS Project Training Recap](#)
- [Atlanta Leader Institute Meeting](#)
- [New PMI Global Standards](#)

#### Next Chapter Meeting

**Resource Planning: The Missing Element In Portfolio Management**

February 12, 2008  
5:30 - 8:30 PM

#### Event Update

## A Taste of PMI Boot-Camp: The Way It Was at the Atlanta Leader Institute Meeting

*by Ed Yee, Deb Wallace, and Rowena Sy-Santos*

The PMI Leader Institute Meeting (LIM) held in Atlanta, GA, last October is a real eye-opener for first-timer delegates as Debra Wallace and Rowena Sy-Santos can attribute. The LIM is an intense invitation-only event to help PMI global chapter officers lead their local chapters. PMI has about 250,000 members in more than 250 chapters in 164 countries.

PMI also holds its board of directors meeting during this event, providing a rare opportunity to meet and hear from the PMI board members and the senior executive team. The LIM was followed by PMI's three-day Global Conference on PM practices, and some 3500 attendees were expected at that Atlanta event.

For the three of us, reality began with two half days and two full days of non-stop PMI leadership training, networking and development. The LIM attracted almost 570 leaders from 127 chapters in 27 countries. PMI has a staff of 250 worldwide but it is the chapter or "component" volunteer leaders that do all the heavy lifting and deliver value to the membership.

More than 150 leaders turned out for the First Timers Orientation hosted by the LIM director and PMI board chair Linda Vella. After introducing the PMI board, Linda crisply segued into her David Letterman style top ten tips for leaders.

Keynote speaker, Susan Scott, a nationally-known management consultant, followed with "Fierce Conversations," which dove-tailed neatly into subsequent sessions on global strategy/planning and several intense component training sessions. Three tracks were offered, Individual Leadership Development, PMI Institutional Knowledge and Association Governance.

The three of us attended some common sessions and split up to learn about best

component practices. This was well worth the investment of time and energy, for us personally and for the benefit of the chapter. We made many new PMI connections and learned many new ideas. Debra, our chapter Treasurer, was interviewed as a first timer and was quoted in a PMI newsletter.

The attending worldwide regional chapter representatives held a half-day region meeting on Thursday. Eighteen of the nineteen Region 3 chapters (Eastern Canada and New England) were in attendance. The Region 3 board and chapter leaders had an opportunity to meet their peers and share best practices.

Festivities included a PMI recognition awards lunch and a silent auction. A dinner was hosted by the Region 3 Board at a local micro-brewery and restaurant. PMI hosted a closing reception with food, drink and music so we were able to meet with many of our peers. A closing Q&A session with the PMI board and chief executives allowed for insightful questions from the attendees.

The next PMI Leader Institute Meeting will be in Denver, CO - October 16-18, 2008. We recommend that our chapter be well-represented in Denver.



The Central Mass Chapter of PMI is a professional association serving the Central Massachusetts area promoting the practice of project management, "Making project management indispensable for business results™"  
For more information and how to become a member or attend an event, please go to the Central Mass website: [www.pmicmass.com](http://www.pmicmass.com) .



**Building Professionalism  
in Project Management™  
Project Management Institute**

**Central Mass Chapter Newsletter**

January 2008  
Volume 8 Issue 1

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**PMI Global Standards,  
Exposure Drafts Available  
for Review**

*by Barbara Karten, PMP*

PMI regularly updates its Global Standards, and publishes the draft releases for public comment. This is a great opportunity to influence the standards, and to review the standards prior to final public release. The following standards will be available for review in January, 2008.

- [CMASS Chapter Financial Health](#)
- [2007 - A Great Year for PMICmass](#)
- [New Board Member Information](#)
- [MS Project Training Recap](#)
- [Atlanta Leader Institute Meeting](#)
- [New PMI Global Standards](#)

- A Guide to the Project Management Body of Knowledge, Fourth Edition
- The Standard for Program Management, Second Edition
- The Standard for Portfolio Management, Second Edition
- Organizational Project Management Maturity Model (OPM3), Second Edition

To access these draft standards, go to [www.PMI.org](http://www.PMI.org), select the 'Resources' tab, and then select 'Standards'.

### Next Chapter Meeting

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February 12, 2008

5:30 - 8:30 PM

Doubletree Hotel Westborough

[Register](#)

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