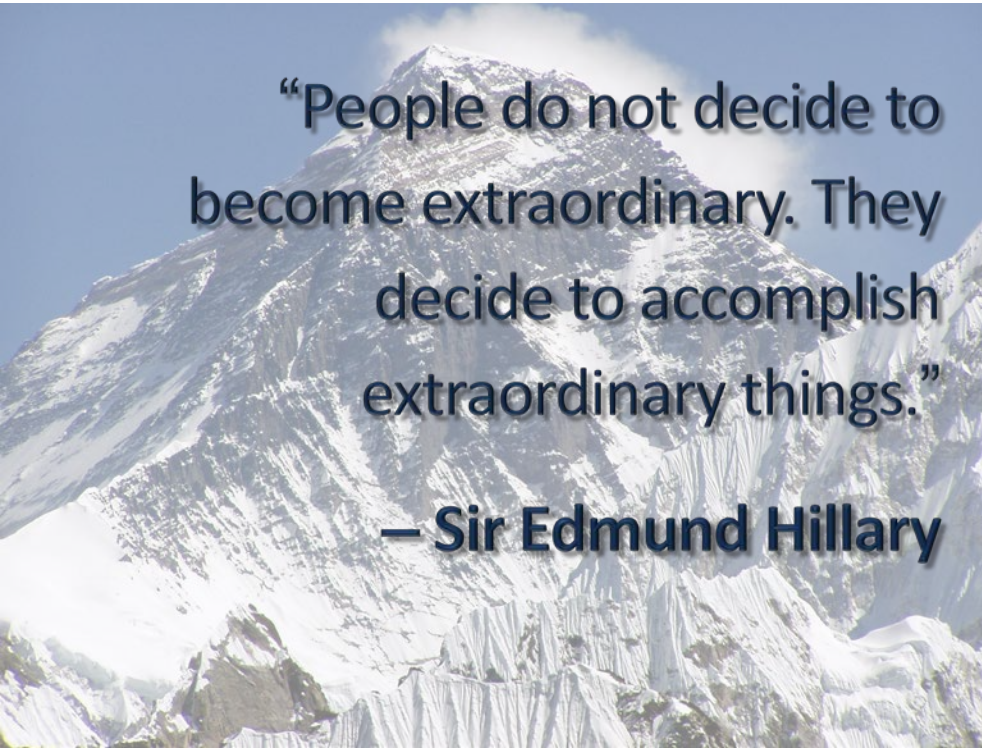# Parallels in Project Management & Climbing Mount Everest

By Manisha Mande, PMI Rochester Chapter Member

> "People do not decide to become extraordinary. They decide to accomplish extraordinary things."
> — Sir Edmund Hillary

Formed nearly 60 million years ago, Mount Everest, standing at 29,029 feet or 8,848 meters above sea level, is the crown jewel of the mountaineering world. Called by many other names such as Zhumulangma (Chinese), Qomolangma (Tibetan), Sagarmatha (Nepali) or Chomolungma, it is named after Sir George Everest, a British general of India.

Climbing Mount Everest takes planning, leadership, implementation, and risk management all key planks of any Project Manager's arsenal.

The book "On the Edge" by Alison Levine has been the inspiration for this article. Although the book makes the case that the leadership principles that apply in extreme adventure sports also apply in today's extreme business environments, I have tried to focus more on the many principles of good project management that apply to extreme sports as they apply to every day to day projects.

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PLANNING

Planning an Everest expedition is no easy task, even for experienced mountaineers. Every piece of the puzzle has to fit perfectly for the climb to be successful. One misstep in the plan and people can be in serious danger. Planning is an integral part of the different phases of this extreme sport as will be discussed below.

Pre-climb planning: involves effort put into physical training, finding sponsors and raising the funds to pay for the trip, organizing the logistics and getting all of the required gear and supplies together.

Evaluating the initial cost of the expedition is critical as this money is allocated to cover necessary costs such as airfare, pre and post climb lodging, gear, food, climbing permits, supplementary oxygen, and the guiding services of the Sherpas. Logistics also have to be planned accordingly, including getting the oxygen tanks, gear and supplies to Base Camp along with the team itself.

Alison Levine, one of only a handful of people to complete the Adventurer Grand Slam by reaching the top of the highest mountain on every continent says that, planning the logistics related to the overall ascent and descent is crucial for all teams. Not only do you need to plan to help you get to the top, you have to plan well to get yourself and your team back down. *"People often forget that the top is only the halfway point", says Alison*. The descent like the ascent requires proper training and preparedness along with enough reserves – both in climbers' oxygen tank and in their body. No matter how skillful or strong or experienced a climber is, sometimes things can still go wrong. Team leads must constantly test their ideas with the other climbers to ensure clarity of the expedition's goal and the way they are going to achieve it.

Planning the acclimatization process: When climbing mountains to high altitude, an acclimatization (adapting to high altitude gain) schedule is crucial for the health and safety of all team members. Altitudes affect respiration, cognitive abilities and brain function not to mention motor skills, memory, reaction time and mood which are all affected at very high elevations as well. People feel sick because at 18,000 feet, ones' body is getting 50 percent less oxygen than it would at sea level. As a climber moves from a base camp at a lower elevation to one at a higher elevation and back, the climber's body then learns to adjust and function with a smaller supply of oxygen and at the same time gets the time to regain some strength and energy for the climb ahead.

Planning for the perfect summit: After acclimating to Everest's hostile environment the plan is then focused on the final push to the summit via either the South Col.

route or the North Col route. Team leaders and team members have to meet to strategize the final ascent. Climbing teams pre-determine turnaround times to signal descent or abandon summit efforts. These turnaround times must take into consideration weather conditions, the training level of climbers, etc. Calculations have to be made regarding major risks, such as performance reduction due to the lower oxygen level at high altitudes, dehydration, lack of sleep, and – most importantly – reduced decision-making abilities of leaders, surprise snowstorms that occur without warning, problems with radio communication etc. Real-time monitoring of weather conditions must be planned in. It should be clear who is responsible for supervising the Sherpas, waiting for clients, providing medical emergency services, or even tying the ropes. A lack of action causes delay. Delay – in a mountaineering world – means more oxygen used, and less time to turn around. As a leader of the expedition, you must know when to turnaround and not make irrational decisions, how to determine project viability – meaning at each stage in the climb complete some "reality checks" or risk assessment to deal with things like deteriorating weather conditions, determine if intervention plans need to be implemented if the climb does not go according to plans or is there a need to get all the participants safely home with/without oxygen. Based on evaluation, the climb can then be abandoned (turning back), or redirected, or modified.

As a leader of the expedition, you must know when to turnaround and not make irrational decisions, how to determine project viability

Drawing similar comparisons in project management, project planning entails getting it organized before any work actually gets started. The project manager and the team, perform a detailed analysis of whether the objectives in the project charter can be achieved. They then decide how the project – including its strategic objectives - will be accomplished, addressing all appropriate project management processes and knowledge areas. *Project Managers are supposed to think about all the things before they do them*. The creation of the Project Management Plan is documenting the strategy for managing the project and the processes related to knowledge areas of scope, schedule, cost, quality, human resources, communications, risk, procurement and stakeholder management that everyone on the project should follow to ensure consistent results.

In project management, a project manager's work is focused on preventing problems. Performing Risk Management on their project, the project manager considers the threats and identifies possible actions to take if a particular risk occurs. Performing risk management on a project helps prevent many problems and helps make other problems less likely or less impactful. Conversely, effective risk management also helps to increase the probability and or impact of positive risks, or opportunities. These are the benefits of risk management and the reasons it is a required part of proper project management.

In project management, retracing steps or going over something that is already familiar might feel like a burden, it's clearly not a waste of time.

LEADERSHIP

Alison Levine in her book "On the Edge" states that leadership is everyone's responsibility regardless of age, tenure or where they work. Leadership in extreme environments requires the will-power, the teamwork, the high moral character, and the emotional intelligence necessary to overcome exceptional hurdles, solve complex problems, and face any sudden uncontrollable, high risk situation.

Leadership whether in a business context or in extreme sports requires individuals to be able to make crucial decisions on the spot when the conditions around them are far from perfect? Their survival and the survival of their teams depend on it.

Leadership is an attitude. What we say matters. What we do makes a difference. And how we lead has impact. Leaders are supposed to know what skills and equipment are needed to get the job done right or to achieve a goal. If you have one but not the other – you will fail.

As on Mount Everest, Team leaders have to weigh all aspects of the climb when making a decision - putting the safety of their Sherpas, clients and guides above anything else. Leadership failures can be disastrous for all involved. The Mount Everest Disaster of 1996 is hailed as one example where leadership failures were critical and could have been easily avoided had it not been for poor planning and a rivalry between competing team leads.

IMPLEMENTATION

On Everest proper, climbers begin to wonder when the reliable summit window will emerge. Spending a night at Camp 3, usually viewed as required for their summit bid and proper acclimatization is on every climbers' agenda. Getting the ropes fixed on the Lhotse Face is needed to enable a successful climb. And then there is the weather that can change within hours – howling winds, rock fall,

high winds, heavy snow and near icy conditions can shorten the season and compress the summit days from the normal range of 6 to 16 (average of 11 since 2001) down to 4. The crowds then become a problem with hundreds of climbers with a wide range of skills all competing for the same real estate.

Successful teams that get to the summit and back, climb as a *tight knit group*; moving deliberately, checking in often with one another. *They climb as one, summit as one and descend as one*. They confirm that with proper experience, training and support, teams still may or may not be successful getting to the summit, but Teams can and will avoid disaster. Good Teams arrive at Everest with the mental toughness to push hard but the discipline to turn around.

In project management parlance, implementation is the executing phase where the project manager and team start to complete the project work as defined in the project management plan and to meet the project objectives. In other words, the goal is to achieve the project deliverables, within the planned budget and schedule, and to meet any other objectives established for the project. This is the "Do" step of the process defined (start, plan, do, check and act, end). The project manager integrates all the executing work into one coordinated effort to accomplish the project management plan and produce the deliverables.

RISK MANAGEMENT

Many would consider climbing Everest one of (if not the most) risky adventures anyone could ever embark upon. The risks of a typical Everest summit outweigh the benefits ten-fold. Despite the risks, people attempt to climb Everest every year. Therefore, it is critical to identify all risks and just as important to understand the interconnections amongst the many elements of the Everest expedition. A domino effect can occur if a given risk is not accounted for and managed properly. The consequences of negligent risk management are extreme in this particular sport, and can result in the loss of life. Some examples of risk during the expedition are inclement weather, deteriorating health, supplemental oxygen, Sherpa ability, inexperience, faulty climbing gear, rock fall, avalanche, gale force winds, blinding snow etc. You get the picture. In assessing any climbing expedition from launch to finish, if risk management processes break down quickly, one finds that many major risks are not considered, thereby contingency plans are not created in the chance that a major disaster strikes. If thorough due diligence is done on these major risks, the result can be one of triumph over tribulation.

According to the PMBOK guide (the bible for any good PM), a risk event is defined as something identified in advance that may or may not happen. If it does happen, it can have a positive or a negative impact on the project. Performing risk management helps prevent many problems on projects and helps make other problems less likely or less impactful. For each identified risk, a project manager tries to determine:

Probability that a risk event will occur meaning how likely is it to occur?

Impact or range of possible outcomes

When can the risk occur?

How often can the risk occur or anticipated frequency of the risk event occurring.

Other key things to consider are:

(1) What is the risk appetite meaning, acceptable level of risk?

(2) What is the risk tolerance level meaning, a measurable amount of acceptable risk and

(3) What is the risk threshold meaning, at what point does the risk become intolerable or unacceptable.

Risk management really involves "Plan before you Act" – in other words, determining the potential areas of risk on the project. Risk identification primarily occurs during project initiating and planning phases of the project meaning at the onset of the project. Yet identifying risks is an iterative process and involves the entire team. Risks should be documented in what is called a "Risk Register" which includes:

- A list of risks – clearly stated in detail
- A list of potential responses
- Root cause of each risk
- Risk categories

Risks should be continually assessed, including their probability and potential impact on the project. A probability and impact matrix can be created to sort or rate risks to determine which one warrants an immediate response and which ones should be put on the "watch list". This helps you come up with a smaller list of the most critical risks to focus on. This process is repeated as more risks are identified throughout the project. The project manager then does a quantitative analysis of the risks to see how they can affect the objective of the

project currently underway. Is there a risk exposure and what do the cost and schedule reserves look like? Then in the risk response planning part, the project manager tries to figure out ways to reduce the risk or eliminate threats and find ways to improve the chances of opportunities & their impacts. Then the project manager looks at all the remaining risks or residual risks (those that could not be eliminated) to determine if any one of them occurred what would the contingency plan be? And if the contingency plan was not effective then what would the fall back plan be. You then assign those risks to specific owners to manage and close out the risk.

In summary, the knowledge and application of project management can be made to an expedition such as the one to Mount Everest just as easily as to a regular project. Focusing on the fundamentals is key to success. The story of climbing Everest is a testimonial to rendering the impossible possible through exemplary teamwork, leadership and personal spirit. It is a story about ordinary people achieving extraordinary results. It is important to learn from the historical expeditions of others, but to also gain insights from your own unfolding experiences (Lessons Learned in project management parlance). In his article, "Leadership Lessons of Mount Everest", author Michael Useem documents that four essential principles emerge from people trying to scale Mount Everest:

Leaders should be led by the group's needs

Inaction can sometimes be the most difficult, but wisest action

Focusing on the fundamentals is key to success.

If your words don't stick, you haven't spoken

Leading upward can feel wrong even when it is right

Alison Levine, in her book "on the Edge", writes that, "if you're going to take on a big, hairy challenge, be it the mountains, in business or in life, you understand up front that you may succeed or you may not. But you don't ever want to fail and wonder if the outcome would have been different *had you only been more ready*. There is no excuse for showing up in less than top form - you owe it to yourself, and more important, you owe it to your team. " This could very well be the project management mantra!

Acknowledgement:

 "On the Edge" by Alison Levine

"Mount Everest Disaster: The PRINCE2 Perspective" by Rodrigo, April 2017

"Leadership Lessons of Mount Everest" by Michael Useem

Message from the President

By Michelle Venezia, PMI Rochester Chapter President

Welcome to fall and a new chapter program season!

The 2017-2018 program year is shaping up to be our most engaging and educational yet as a chapter! In the past year, we've grown our membership base from 650 to almost 800 and extended our reach to include the start-up of our first student branch at Brockport College. With this growth, comes our ability to grow our selection of offerings, and our volunteer teams have been busy preparing this selection!

> "In the past year, we've grown our membership base from 650 to almost 800 and extended our reach to include the start-up of our first student branch at Brockport College."

You have received email communication from our VP of Professional Development, Gary Heerkens. Gary has been reaching out to his contacts gained as an active speaker in PMI's SeminarsWorld, and has an amazing chapter program line-up planned for the coming year. This will also afford us the opportunity to enjoy sessions with a diverse group of top PM talent not only for chapter meetings, but for more in-depth seminars on a variety of relevant topics. We'll also continue to expand our certification offerings – be on the look-out for our upcoming Certified ScrumMaster (CSM) training session. Gary will continue to reach out to you as he builds our professional development plans

ROC The Project

From an Outreach perspective, Linda Marshall and her team have been focused on re-energizing our mentoring offerings as well as bringing forward our much-anticipated communities of practice in areas such as Agile and PMOs. They will also be announcing details soon on an exciting new initiative called "ROC The Project", intended to bring together our members with the broader Rochester collegiate and corporate communities. If any of these areas excite you, reach out to us for volunteer opportunities.

Watch for us in the community as well, as we promote our profession. We'll be leveraging our membership in the Rochester Chamber of Commerce, including exhibiting at the upcoming "Rochester Chamber Top 100" awards ceremony on November 2. We will continue to look for opportunities to advocate for our members, to achieve our vision: "Organizations in Greater Rochester will embrace, value, and utilize project management and attribute their success to it".

I look forward to seeing you at upcoming events, or please email your ideas to me at

ROC THE PROJECT

Outlook for Outreach

By Marc Ambrosi, Director of Community Outreach

The Outreach Team, under the leadership of Vice President Linda Marshall, have been working diligently in shaping up PMI-R's outreach initiatives for the balance of 2017 and setting the course for 2018. Aligned with the Vison and Mission of the Chapter, the Outreach Team is responsible for developing strategies for outreach initiatives in the areas of Corporate, Executive, Community and University outreach.

The overarching goals for the Outreach Team are promoting awareness and supporting the training and development of PM professionals through partnering with organizations dedicated to the advancement of project management principles and practices. Paired with those goals are the efforts of the Outreach Team to encourage and foster the adoption of Project Management practices by corporations, government and other entities and create networking opportunities for Project Management Practitioners.

For 2017, the Outreach Team is currently focused on; implementing improved ways to communicate among Chapter members as well as community partners through virtual platforms; raising PM awareness through delivering Community of Practice opportunities, performing Corporate, Community and University outreach activities to develop key partnerships for 2018. Those partnerships will help support the delivery of the Project of the Year award as well as launching the first ROC THE PROJECT in April of 2018.

Making up Linda's Outreach Team are: David Sherburne: Director of Networking, Dawn Footer: Student Branch Committee Chair, Jennifer Allen: Director of Corporate Outreach, Marc Ambrosi: Director of Community Outreach & Athena Thomas-Visel: Mentoring Manager.
Up next? Look for an Outreach Outlook piece in the next newsletter with both an update on the progress of the Outreach Team and how you can get involved to support the effort. On behalf of the Outreach Team, thanks for everything you do in helping to achieve our Vision and Mission!

News You Can Use

By Lori Gacioch, VP of Marketing & Communications

The 2017 PMI Strategic Plan Is Approved

In August, the 2017 PMI Board of Directors approved a new strategic plan for PMI. This plan highlights decisions the Board has already made as part of our strategy refresh. It will serve as our foundation to reinventing PMI as the professional association of the future, sometimes referred to as PMI 2.0. The 2017 PMI Strategic Plan provides the vision that will guide us there—and beyond.

We instituted the "Playing to Win" framework to guide our strategic planning process, capture decisions and communicate our progress along the choice cascade. Our new strategic direction is built on three pillars that some of you may be familiar with from Leadership Institute Meetings and digital communications earlier this year: Strategic focus, customer centricity and organizational agility.

Using these pillars and the "Playing to Win" strategy framework, PMI intends to redefine what it means to be a global professional association of the future, representing and advocating for people who practice project, program and portfolio management. Learn how we will reach PMI 2.0 by reading the 2017 PMI Strategic Plan in its entirety at www.pmi.org/strategicplan.

Important Information: Upcoming Exam Updates

In 2018, the Project Management Professional (PMP)®, Certified Associate in Project Management (CAPM)® and PMI Agile Certified Practitioner (PMI-ACP)® exams will change to align with A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Sixth Edition and the new Agile Practice Guide, which serve as references. Information for each exam can be found in the appropriate Exam Content Outline on PMI.org.

Beginning 26 March 2018, the PMP exam will reflect content from the PMBOK® Guide – Sixth Edition. Exams administered before 26 March 2018 reflect PMBOK® Guide – Fifth Edition. On 26 March 2018, the PMI-ACP exam will also update to reflect the new Agile Practice Guide. Updated information for the CAPM exam will be shared in an upcoming Friday Facts and on the Update Center.

News from Ithaca

By Paula Wedemeyer, VP of the Ithaca Branch

Honored "[T]he privilege of being associated with or receiving a favor from a respected person, group or organization, etc." – dictionary.com

I am truly honored to be serving you as the new Vice President of the Ithaca Branch. It is a privilege as well as a serious responsibility. As I step into this role, I am committed to supporting the members of this essential organization. And I do believe that PMI is essential - not only to those who lead projects but also the organizations who sponsor them. There is no individual who would be able to collect the knowledge and resources that are provided to us through PMI. Throughout the years I have benefited from the organization and from the hard work of others. I am eager to repay the debt I owe.

"As I step into this role, I am committed to supporting the members of this essential organization."

Speaking of benefiting from the hard work of others, I would like to sincerely thank those who have willingly donated their time and energy to the Ithaca Branch during the past two years. Under the leadership of Dina Maxwell and with the commitment of folks such as Dan, Kelly, Jolene, Dawn, Sara, Quyhn, and numerous others, the Branch has provided members with countless opportunities to learn and grow.

"I would like to sincerely thank those who have willingly donated their time and energy to the Ithaca Branch during the past two years."

The successful completion of the Branch's third annual Professional Development Day is just one of the their many accomplishments. The number of members and organizations being served has greatly expanded. The Branch has morphed from an Ithaca based membership group into one that is serving members from a wide geographic area. A huge thanks to all of you for your countless hours and for your commitment!

The successful completion of the Branch's third annual Professional Development Day is just one of the their many accomplishments.

There is still lots to be done. And we will need your help.
As we go forward, I will be calling on membership to help with the development of a strategic plan for the Ithaca Branch. Some possible areas of focus include building a stronger synergism with the Rochester chapter, creating a feed-back loop for Ithaca Branch members, enhancing our internal processes, public service activities, increasing certification opportunities, and providing geographically dispersed meeting venues.

We are all busy with multiple demands on our time. Let's work together to enhance the value of your PMI membership and to make our meetings as meaningful and impactful as possible.

Please bring your ideas and join us at our coming events!
• On October 17th we arranged for Micheal Mitutis to speak to us on Marketing Yourself Strategically (and Successfully). [Read more here!](#)
• On November 15th Dr. Nagaraia Shashidhar will discuss Strategic Management and the Rapidly Changing Requirements. [Register now!](#)
I am looking forward to working with you.

Professional Development

By Gary R. Heerkens, VP of Professional Development

After taking office in early September, I spent a fair chunk of time poring over a member feedback survey to better understand the wishes of the PMI Rochester membership. Here are some of the key things I took away from that exercise:

- You asked for more professional and dynamic speakers.
- You asked for greater affordability.
- You asked for some virtual learning.
- You indicated your intent to "*get certified*".
- You asked us to provide alternative formats to our monthly meetings.
- And you asked for better service and greater value-added.

These are among the many things I will focus on as we head though the 2017-2018 season. And I think we're off to a pretty good start. Here are some of the programs that we have recently had, have already slated, or are actively planning:

October Dinner Meeting

Features Frank Saladis, PMP, PMI Fellow, a well-known speaker internationally, shared many valuable insights in his presentation entitled "The Indispensable Project Manager". Read more here!

October Seminar

Frank Saladis stayed in town for an extra day, and delivered a seminar on "Managing Difficult Stakeholders". I know—we rarely run into difficult stakeholders, but just in case, Frank showed us how to deal with that situation, should it arise. Read more here!

November Chapter Meeting

Did you notice that I didn't refer to it as a dinner meeting? That's because it is a shortened, alternate-style version of our monthly gathering. As we graze on finger food at the Italian American Community Center (yum!), we will be listening to Brian Gregory's story of how he applied project management tools and techniques to help him deal with a mental health issue that plagued him. This promises to be a very different kind of presentation, to be sure. Register now!

Certified ScrumMaster Prep Class

At the end of November, I will be bringing Jesse Fewell to town to deliver his popular CSM Prep program. Jesse was very well-received when he ran this program for our chapter awhile back. This program will be priced at $200-500 less than the going rate on the open market. Register now!

December Dinner Meeting and December Seminar

This will be our annual member give-back meeting. For this pair of events, I am in the process of trying to line up another internationally-known figure with eminent credentials. More info will follow by way of an email blast and online postings.

I'd also like to begin putting out a call for local speaking talent—I know you're out there. If you want at least 20 minutes of PMI Rochester fame, please get in touch with me at: pdvp@pmirochester.org.

Finally, if you have any feedback or suggestions regarding the way I am running our professional development program…I'm all ears.

Financial News

By Debra Jacyzyn, VP of Finance
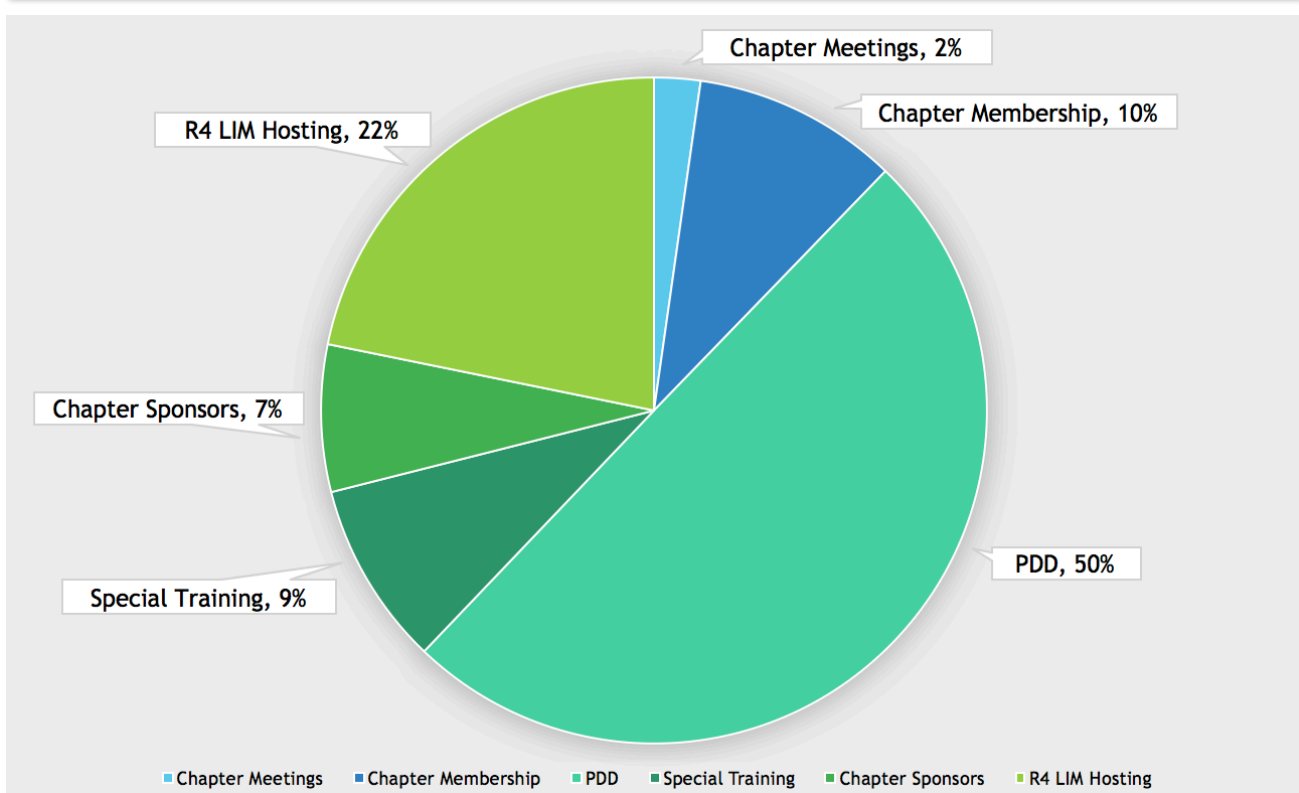
PMI ROC Chapter at Work for You!

On August 9th, 2017, the **Annual Board Presentation** was delivered to our membership. This has been an excellent year and in keeping with our Mission to provide an organization for our **Membership** that promotes Education, Networking and Community Outreach programs to benefit *You, Your* skills and *Your* career. The Board also delivered Member Appreciation events at no cost to you. Investment in initiatives to bring value to our members and the greater Rochester/Ithaca communities include the Rochester Red Wings Game in July and the Annual Planning Meeting in August.
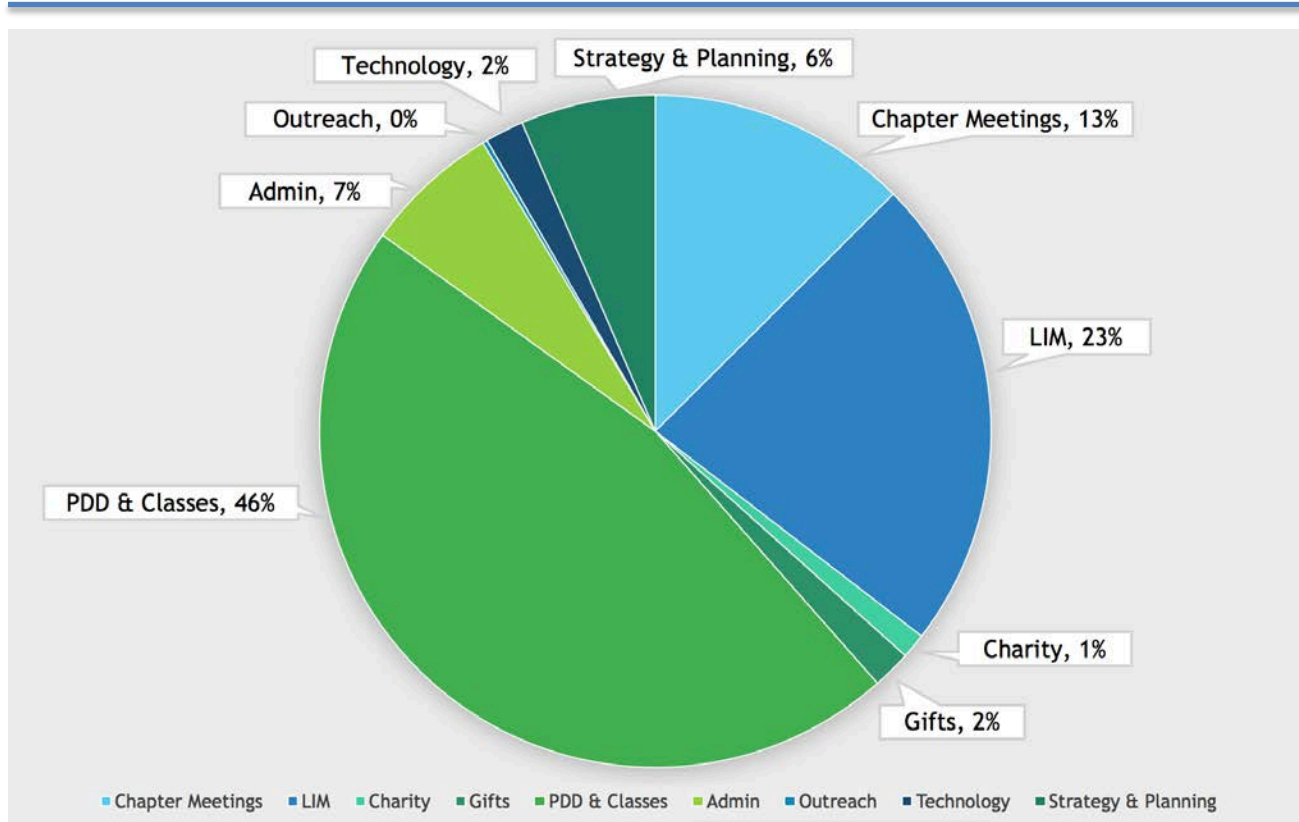
Financial Update

	2015	2016	2017 (YTD)
REVENUE	$97,286	$151,369	$144,873
EXPENSES	$127,013	$123,707	$107,979
RESERVES	$157,202	$184,864	$187,459

The next charts display our sources of revenue and the allocation of expenses on *your* behalf for 2017:

Sources of Revenue

Investments in You!

Pie chart titled "Investments in You!" showing the following categories:
- Technology, 2%
- Strategy & Planning, 6%
- Outreach, 0%
- Chapter Meetings, 13%
- Admin, 7%
- LIM, 23%
- PDD & Classes, 46%
- Charity, 1%
- Gifts, 2%

Legend: Chapter Meetings, LIM, Charity, Gifts, PDD & Classes, Admin, Outreach, Technology, Strategy & Planning

Our Mission is to provide an organization for our **Membership** that promotes Education, Networking and Community Outreach programs to benefit *You, Your* skills and *Your* career.

The activities our Chapter delivers serve to enhance our knowledge, leadership and skills. The featured speakers add to our awareness and knowledgebase by sharing topics, best practices and inviting us to ask pertinent questions for everyone's benefit. The value-added benefit of sharing practical applications for the work environment enables the potential application to *your* workplace.

Each Chapter Meeting affords us the opportunity to meet new people, share our ideas and common Project Management Practices. Our Website, Newsletters and Professional Affiliations deliver additional information and opportunities to advance our expertise.

2017 continues as a busy year for our **Membership**. Our investments to give back to *You* comprise these categories:

- The annual **PDD** is a great way to accelerate your required PDUs for *your* ongoing certification
- Our **Chapter Meetings** are an excellent opportunity to Network and gain Knowledge and Practical Application

- The **Director and Volunteer Appreciation Meetings** acknowledge and recognize their Contributions
- The **Community Outreach Program** develops both our Members and the Community
- **Special Classes** serve to advance our Knowledge and Skills

Volunteer Spotlight

By Paula Wedemeyer, VP of the Ithaca Branch

How Lisa Stensland Brought PMI to Ithaca

On Friday, September 15, 2017 a group of professional project managers from a wide geographical area attended the third annual Professional Development Day of Rochester chapter's Ithaca branch. It would never have been possible without the propensity of Lisa Stensland to fix problems that she sees.

Lisa could not attend the event. But she was proud nonetheless. Her vision of how things could be done better was the driving factor in the formation of the Ithaca branch. With the selfless help and support of numerous people along the way, she incrementally increased the quality of knowledge and support available to project leaders in the Ithaca region. The journey started with a disjointed group of project leaders at Cornell University and has culminated in an association with the Rochester chapter and with project managers from throughout the southern Finger Lakes region. (One of Lisa's proudest moments was an event where more people who were not associated with Cornell attended an event.) These relationships continue to strengthen to this day.

In the interview below Lisa explains how the issues she faced led to the formation of the Ithaca branch. She also shares her vision of future issues to be overcome.

Her vision of how things could be done better was the driving factor in the formation of the Ithaca Branch

How did you come to get involved with project management?

After graduating college with a degree in computer engineering, I started a career in computer programming. While I very much enjoyed building systems, I realized that having my primary "interface" be with another computer wasn't nearly as satisfying as working with other people. I found myself seeking out opportunities where I could collaborate more closely with team members. At one point, one of my supervisors was away from the office for an extended period, and we had a software release to plan. I discovered that I really enjoyed the work of taking a big thing, breaking it up in to smaller pieces, then working with my team to estimate those pieces, and organizing them into a project schedule. To me, it was like putting a puzzle together – by taking all of these tasks, their dependencies and resources needs, and assembling them in such a way that the work could be completed as efficiently as possible. At the time, I didn't know about PMI or that even project management existed as a career of its own. Soon after, the company I worked for began to assemble a dedicated project management team, and I knew I wanted to be part of it, so in 1999, I transitioned from being a computer programmer to a project manager overseeing some of the systems I helped to develop.

What made you join PMI?

I joined PMI in 2002, when I worked for a different company that was beginning to formalize its own project management practice. We wanted to leverage industry standards as much as possible and we took advantage of the tools and techniques that PMI promoted to help us do that.

What led you to set up the Ithaca Branch and how did you approach it?

In 2005, I joined Cornell University as a Senior Project Manager in the central IT department. At the time, central IT was just forming its PMO to promote project management practices and was hiring project managers to lead various campus-wide IT projects. We were a small group and learned a lot from each other's experiences, but there were project managers (either formally or as part of their job) all over campus, and there wasn't a mechanism to bring us together to collaborate.

In 2008, after I was appointed manager of the central IT PMO, I sought to change that. One of the things we started was a Project Management Special Interest Group (PM-SIG) and we invited participants from all over Cornell to come to periodic meetings to learn about various project management topics and collaborate. We regularly had a couple dozen people in attendance at our meetings, which was great! However, something was missing…

1200A Scottsville Road, Rochester, NY 14624

There was a strong interest in aligning ourselves more with PMI. While many of us were members of "local" PMI chapters, chapter meetings were not frequently attended due to distance. Ithaca was a minimum of an hour away from any of the three nearest chapters (Binghamton, Syracuse, and Rochester), so it was difficult for our little enclave of project managers to take advantage of the benefits of PMI and the networking and opportunity that comes with being part of a larger group. The cohort in Ithaca was really too small to support a chapter of its own, but perhaps there was another way?

In late 2009, I had attended a Rochester chapter meeting and struck up a conversation with then president Al Gubiotti and I told him about our little group down in Ithaca. It turned out that the "branch" concept was just starting to gain some traction in PMI as a way for smaller groups to organize under the leadership of a larger chapter. As we explored this possibility, it seemed the perfect solution for the project managers near Ithaca to more fully realize the benefits of their PMI membership by providing a way for the project managers to network, gain PDUs, and collaborate, without all of the overhead that would be required to sustain a full-fledged chapter.

With some by-law and business plan changes at the chapter level, Ithaca became a branch of the Rochester chapter in August 2010. I led the Ithaca branch as VP of Operations until 2013, then took on the role of Director of Communications for the branch until 2015. I am so amazingly proud of how this branch has grown over the years and am so thankful that PMI Rochester has been able to serve the membership in Ithaca in this way. Special thanks go to Dina Maxwell and Paula Wedemeyer for continuing to carry the torch for Ithaca!

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What lessons learned from the process would you like to share?
While this happened many years ago, I don't recall hitting too many bumps in the road to learn from. For anyone thinking of starting a branch, my advice would be to align with a large chapter that has the infrastructure to support branches. A smaller chapter may have had challenges with the work that went into formalizing the structure. Working in a branch model does require more collaboration between the branch and the chapter than a chapter without branches. In a way, you have a duplicated

leadership structure with some of the roles replicated at both of the chapter and branch level. It is important that the branch and chapter work closely together to prevent duplication of effort and to be mindful of what each is doing so that programs and benefits can be extended to all members as much as possible.

One thing we discussed, but weren't able to move forward was the ability for branch members to attend chapter meetings remotely (for example, by videoconference) and vice versa. I think this would be a great benefit to be able to offer if the logistics, technology, and attendance tracking details could be worked out as it would provide even more opportunities for members to participate and learn from discussions happening in different locations.

What do you see as the biggest challenge project and portfolio managers will face in the future?
I don't think this is a future challenge, but a challenge faced in the past and that we will continue to face in the future. The challenge is continuing to prove the value of having dedicated project management professionals on your team as opposed to staff who act as project managers as a small part of their regular job. As I have seen some organizations streamline their PMOs with the expectation that functional managers that are not trained project managers will make sure projects get done, the projects aren't done with the same level of discipline and success as you would have if it was done by a professional project manager. Senior leadership loves knowing that a project has been thought through, that the issues are being worked, and the deliverables are being tracked. When the same set of processes is applied across projects, the consistency that is provided helps amplify that sentiment. Project managers should continue to demonstrate their critical value by ensuring all of those important aspects of project management are visible to the senior stakeholders of an organization, and using their tools to deliver successful projects – on time, on budget, on scope, and with quality!

What future opportunities do you see for the field of project management?
I believe project management continues to be a very important profession and discipline that applies to all industries. Staying on top of all of the latest tools (it seems like there are new ones popping up every day) and techniques as well as different emerging methodologies is key to staying fresh in the field! The more tools you have at your disposal, the more you can cater to the needs of your project.

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