Foreword

The first public Australian Symposium on Performance Management was held in Canberra in 1990. Subsequent events were staged in 1993, 1995, 1997, 1999 and 2002. The last symposium was particularly successful, featuring high quality presentations and attracting a large number of presenters and delegates from Australia and overseas. Beginning in October 2002, the symposium is now also conducted in the United Kingdom. The next United Kingdom Performance Management Symposium is currently scheduled for October 2003 in London.

In the earlier conferences the emphasis was clearly on the application of Earned Value Performance Management (EVPM), or Cost/Schedule Control Systems Criteria as it was then known in the Defence environment. Until 1995 most of the speakers and delegates were drawn from Defence or Defence Industry. Over the last four conferences, the scope has greatly broadened to emphasise other performance management aspects and the presenters and delegates have represented a more equal distribution between defence and non-defence areas. This is in consonance with the symposium objective to provide an interchange of ideas and initiatives between these two sectors.

In 2003 the scope of the Conference has been deliberately broadened to recognise all tools, practices and techniques that affect the measurement and management of project performance.

At the same time, Earned Value Performance Management remains an important focus of the Symposium and has achieved greater prominence within the non-defence sector as witnessed by the recent release of the Australian Standard for Performance Management based on Earned Value. The value of EVPM is recognised globally in both the Defence and non-Defence sectors and has received greater emphasis in the Project Management Body of Knowledge.

The 2003 Symposium features in excess of 50 theatre-style, luncheon and dinner presentations including many senior delegates and speakers from Australia and overseas. From executive perspectives to practical application, the scope includes Australian and international defence acquisition, telecommunications, transport, banking, pharmaceuticals and information technology enterprises.

The Australian Conference has been organised and conducted by MTC AustralAsia. The United Kingdom Conference is organised and conducted as a joint effort of MTC AustralAsia and the United Kingdom Royal United Services Institute.

We hope that you will find all the information that you require in this handbook or on the noticeboard. Should you have any questions, a number of MTCA staff, identified by yellow name badges, should be able to assist.

If you have any special dietary requirements, please ensure that the registration desk has a record. Similarly, if you will not be attending the cocktail party or if you will not be at all meals, please advise the desk for catering purposes.

If you are presenting a paper then your track chairman should have made contact with you to ensure that he has the correct biographical details, the time is correct and that the audio-visual facilities are satisfactory. If you have not made contact with the chairperson then please use conference staff to effect an introduction.

Please remember to turn off mobile phones (cell phones) in the presentation room.

and

Enjoy the Conference

TABLE OF CONTENTS

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About the Organisers

About MTC AustralAsia Pty Ltd

MTCA is an Australian-registered company specialising in Performance Management Consulting, Project Management Staffing and related Training Services for Australian and overseas clients.

Our vision is to be recognised leaders in the furtherance of the performance management discipline, a customer's first choice for the provision of performance management system solutions and to continually improve through the professional growth and active involvement of our people.

Employing only specialist staff with extensive project based experience, **MTCA**'s primary aim is to assist organisations to plan, establish and control their project, program, portfolio and strategic enterprise level endeavours. We identify the performance objectives at each level and then focus on the value, timeliness, integrity and analysis of relevant measurement data. We ensure that an enduring performance management system results by addressing the leadership, technique and cultural changes required within the organisation.

For effective business operation an organisation's project management system should be appropriately coupled with the financial, procurement, time recording and reporting systems. We can assist in the integration of existing business systems and ensure that efficient, timely and accurate performance and other management data is reported. In addition, integrated system documentation can be developed or improved to meet knowledge management needs and associated training required.

MTCA offers consultants and staff who are uniquely acquainted with international commercial and government practices and requirements. Project work in both Government and Industry sectors includes experience in telecommunications, shipbuilding, construction, electronics, aircraft, space, military, energy and transportation, many with a software intensive focus.

MTCA is an Australian Government Endorsed Supplier and a Defence Recognised Supplier.

MTCA Services

1. Performance Management Consulting

MTCA assists government and commercial organisations in the use of best practice performance management systems that provide timely, reliable and meaningful management information to facilitate decision making. Our objective is to implement and maintain systems that meet the requirements of both our clients and their stakeholders to bring organisational endeavours in on time and within budget.

We provide advice on governance and teaming structures to meet various contracting scenarios, help to identify key performance indicators and to develop integrated performance reporting systems that assist the various management levels to better comprehend their project and business performance.

MTCA can also assist with tender development and evaluations, business case reviews and in-project performance evaluations. We perform a detailed analysis of project data, interview key personnel to identify cost, schedule and technical risks and forecast the likely final cost and schedule.

2. Project Management Staffing

MTCA staffs have a tremendous breadth of project experience to bring to bear in support of project management and project office operations. Our customers have included numerous government and commercial organisations across a diverse range of projects and technologies. Our work scope has included project planning and scheduling, financial planning, developing acquisition and business case documentation, estimation, cost analysis, information resource management, risk assessment, tender development and evaluation, source selection, and training. We have particular expertise in the control of projects developing complex, software intensive systems.

MTCA is able to provide a customer with program managers, project directors and project managers who are experienced in a diverse range of technology domains. We also provide a full range of services related to the establishment and operation of a Project Management Office, including the provision of a project office manager, schedulers, controllers, performance analysts etc. Our staff are particularly skilled in the application of project and performance management standards, methodologies and tools, including extensive experience in the implementation of Earned Value Management principles.

3. Training Services

MTCA provides tailored training services in association with its consultancies and staff placements. In addition we are able to offer stand-alone courses in acquisition management, project management, project planning and project accounting. *MTCA* staffs have been providing training in Earned Value Management techniques for over a decade the USA and Australia and more recently in the UK and other European countries.

In addition, *MTCA* can perform a training needs analysis across your organisation, identifying critical tasks and associated organisational and staff proficiency. We are able to structure a training program to meet your proficiency needs and later re-assess staff proficiencies to measure effectiveness. We also offer ongoing coaching and mentoring programs.

Range of Services

Performance Management Consulting

Performance Management Techniques

Earned Value Measurement

Integrated Management Systems

Governance and Teaming Structures

Integrated Reporting Systems

Project Performance Evaluations

Business Case Reviews

Tender Preparation

Tender Response Evaluation

Project Initiation and Planning

Integrated Baseline Reviews

Management System Documentation

Project Management Staffing

Program / Portfolio Manager

Project Director / Manager

Project Office Staffing

- **Project Office Manager**
- **Scheduler / Analyst**
- **Project Controller**
- **Project Accountant**
- **Performance Analyst**
- **Risk Analyst**
- **Documentation Controller**

Training Services

Training Courses

- **Acquisition Management**
- **Project Management**
- **Earned Value Management**
- **Project Planning**
- **Project Accounting**

Training Programs

- **Training Needs Analysis**
- **Proficiency Profiling**
- **Coaching and Mentoring**

3

Experience

MTCA has extensive experience assisting organisations to develop, implement, document and support management control systems throughout the world. Our staffs have between 10 and 35 years experience in both Defence and commercial industry working in a diverse range of projects and environments.

Following is a partial list of the organisations that we have assisted.

- AirServices Australia
- Australian Department of Defence
- Australian Defence Industries Ltd
- Australian High Commission, UK
- Aerojet General
- ATT
- Australia Graduate School of Engineering Innovation
- Atlantic Research Corporation
- AWADI
- Bell Helicopter
- Borg-Warner Automotive
- Boeing Company
- Boeing Australia
- British Aerospace
- BAe Systems-UK
- CelsiusTech Australia Pty. Ltd.
- EASAMS
- Eaton Corporation
- Fairchild Republic
- Ford Aerospace and Communications Corp.
- Ford Motor Co
- General Electric Company
- General Dynamics Corporation
- Gould, Incorporated
- GTE-Sylvania
- Harris Corporation
- Helitech
- Hercules, Inc
- Honeywell, Inc.
- Honeywell Space & Avionics Control
- Hughes Aircraft Corp.
- ITT
- Litton Industries
- Lockheed Corporation
- Logica, UK
- M/A-COM Linkabit Corporation
- Martin Marietta
- GEC Marconi, UK

- McDonnell Douglas Corporation
- Monsanto
- Motorola, Inc
- Northrup Corporation
- National Aeronautics & Space Administration
- Northrop Corporation
- NQEA Pty Ltd
- NSW RTA
- Philips MEL, UK
- Rust Construction Services
- Rolls Royce, UK
- Rockwell International
- Rockwell Systems Australia
- RLM Systems
- Science Applications International Corp
- Singer, Inc.
- Stanilite, Pty Ltd
- Strahan & Henshaw-UK
- Storage Technology Corporation
- Sperry Univac
- Telecom, ATS
- Telstar, Pty Ltd
- Telstra, IS
- Telstra, Retail
- Telstra, IBU
- Telstra, CPO
- Tenix Defence Systems
- The Magnavox Company
- Transfield Amecon
- United Kingdom Ministry of Defence
- United States Air Force
- United States Army
- United States Defense Systems Management College
- United States Navy
- United States Department of Energy
- United States Department of Transportation
- Westinghouse Electric Corporation
- Williams International
- Wormald

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STREAM FINDER

Wednesday 19th Feb 2003

Executive Perspectives
Federation Ballroom

Lunch (Albert Hall)
Sponsored by Boeing Australia

Stream 1 Federation Ballroom South	Stream 2 Centenary Room 2	Stream 3 Federation Ballroom North

Cocktail Reception Party
Atrium & Gallery

Thursday 20th Feb 2003

Executive Perspectives
Federation Ballroom

Lunch (Atrium & Gallery)

Stream 4 Federation Ballroom South	Stream 5 Centenary Room 2	Stream 6 Federation Ballroom North

Conference Dinner
Federation Ballroom

Friday 21st Feb 2003

Stream 7 Federation Ballroom South	Stream 8 Centenary Room 2	Stream 9 Federation Ballroom North

Lunch (Albert Hall)

Symposium Administration – Assembly Room

PROGRAM

Day 1 -Wednesday 19 February

8.00	Morning Tea & Registration
	FEDERATION BALLROOM (NORTH & SOUTH COMBINED)
9.00	**Opening Remarks** - **Lloyd Carter** Managing Director, MTC AustralAsia Pty Ltd
9.30	**Official Opening – Hon Fran Bailey, MP** Parliamentary Secretary to the Minister for Defence
10.00	**Defence Keynote Address – Mick Roche** Under Secretary Defence Materiel
10.30	Morning Tea
11.00	**Executive Perspectives – David Gray** Managing Director, Boeing Australia
11.30	**Executive Perspectives – Alan Wakeham** Managing Director Defence Systems , BAE Systems
12.00	**Executive Perspectives – Peter Spooner** General Manager, Ball Solutions Group Pty Ltd
12.30	**Mark Martin – National President APMA**
12.40	**Luncheon (ALBERT HALL)** **Sponsored by Boeing Australia Limited**

	Stream 1 **FEDERATION BALLROOM SOUTH**	Stream 2 **CENTENARY ROOM2**	Stream 3 **FEDERATION BALLROOM NORTH**
2.00	**Perf Mgmt Case Study** **D Castledine** Cfocus Pty Ltd **& M Skinner** *Performance Measurement in Australian Naval Ship Refit and Repair*	**Cultural Issues** **George Davis** Principal & Co-Founder Davis & Dean, USA *Performance Management Culture*	**Balanced Scorecard** **Mike Cowper** Director, BPM Solutions CorVu Australasia *Strategic Performance Management*
2.45	**Perf Mgmt Case Study** **Patrick Weaver** Fallon Project Management P/L *Project Control – Trends to Systems Integration*	**Cultural Issues** **Pankaj Kashmiri** Project Manager Venture Infotek Global Pvt India *Cross Cultural Management*	**Balanced Scorecard** **John Schlichter** Principal, Agylon, USA *Project Prioritisation*
3.30		**Afternoon Tea**	
4.00	**Perf Mgmt Case Study** **Jim Muir** Material Finance Division, DMO *Performance Management the Core of the Defence Materiel Organisation's Business Model*	**Governance** **Chris Dellit** Director Catalyst Consulting Australia *Alliances/Joint Ventures*	**Balanced Scorecard** **Aubrey Gonsalves** National Product Manger Ocean Group, Australia *Multi-level Performance Reporting*
4.45	**Perf Mgmt Case Study** **Paul Coles** Project Controls Manager RLM, Australia *Project Office Support*	**Governance** **Diane Barbeler** Director The Coach House Leadership Centre Pty Ltd *Cross Cultural Mgmt*	**Strategic Planning** **Quentin Redman** Snr Manager/Eng Fellow Raytheon Missiles Systems, USA *Cost vs. Performance*
5.30	**Break**		
6.00	**Cocktail Party Reception** **(Atrium & Gallery)**		

PROGRAM

Day 2 - Thursday 20 February

8.00	Morning Tea & Registration
	FEDERATION BALLROOM (NORTH & SOUTH COMBINED)
9.00	**Executive Perspective – Eleanor Haupt** President, CPM-PMI
9.35	**Executive Perspective – Adrian Inch** General Manager Program and Project Management, Telstra
10.10	**Executive Perspective – Richard Pilcher** Senior Manager, Project Management Services, BHP Billiton
10.45	**Break**
11.15	**Executive Perspective – Ross Beattie** Industry Development Manager, Software Engineering Australia
11.50	**Executive Perspective – David Norris** Director Application Management Services – Commercial Delivery, IBM GSA
12.25	**Luncheon (ATRIUM & GALLERY)**

	Stream 4 **FEDERATION BALLROOM SOUTH**	Stream 5 **CENTENARY ROOM2**	Stream 6 **FEDERATION BALLROOM NORTH**
2.00	**Investment Management** **Mark Heath** Managing Director MBH Management P/L *Investment Fundamentals*	**Software Projects** **Terry Wright** EGovernment Policy & Strategy Multimedia Victoria *Mgmt By Functional Size*	**Earned Value Management** **David Read** Director, Earned Value Systems **James Thompson** Project Manager Standards Australia International *New Australian EV Standard*
2.45	**Investment Management** **Orest Wasyluk** Dept of Veterans Affairs USA *Capital Investment*	**Software Projects** **Pam Morris** Managing Director Total Metrics *Tracking Functional Size*	**Earned Value Management** **Shane Huby** Acting Program Manager - EVM Defence Materiel Organisation Department of Defence *Simple EV Implementation*
3.30	**Afternoon Tea**		
4.00	**Performance Management** **Lynda Bourne** Snr Project Manager Mosaic Services P/L *Stakeholder Connection*	**Software Projects** **David Cleary** Snr Consultant Charismatic Software Metrics *Estimating Functional Size*	**Earned Value Management** **Geoff Roberts** Senior Consultant Primavera Systems Inc, UK *Simple EV Implementation*
4.45	**Performance Management** **Gary Lazarus** Electrical & Information Engineering Dept Sydney University *Virtual Teams*	**Software Projects** **Evelyn Richardson** Systems Engineering Doctorate Student University of South Australia *Technical Perf Metrics*	**Earned Value Management** **Oscar Banda** Snr Consultant, AzTech International, USA **& Luis Contreras** Snr Consultant, AzTech International, USA *Strategic Earned Value for Senior Management*
5.30	**Break**		
7.00	**Conference Dinner** **(FEDERATION BALLROOM)**		

PROGRAM

Day 3 - Friday 21 February

8.00	Morning Tea & Registration		
	Stream 7 **FEDERATION BALLROOM** **SOUTH**	**Stream 8** **CENTENARY ROOM2**	**Stream 9** **FEDERATION BALLROOM** **NORTH**
9.00	**Project Management** **Ron Sulman** Director Rawlings Sulman P/L *ROI for PM*	**PRINCE 2** **Ian McDermott** Director Tanner James Management Consultants *Applying the Technique*	**Risk Management** **Kevin Nevrous** Partner Deloitte Touche Tohmatsu *Innovative Interaction*
9.45	**Project Management** **Joe Kusick** Snr Manager Raytheon Company USA *Project Independent* *Assessments & EVMS*	**PRINCE 2** **Ray Broadbent** Proj & Program Management Advisor CrimTrac Agency Programme Office *Application Case Study*	**Risk Management** **Mark Crichton** Director – Risk Services Risk Wizard *Risk Reporting*
10.30		**Morning Tea**	
11.00	**Project Management** **Martin Vaughan** Director Terra Firma Pty Ltd *Information Overload*	**Performance Issues** **Kenn Dolan** Director Ferguson Project Management Services *Application Case Study*	**Risk Management** **Colin Cropley** Director Contract Management Pty Ltd *Risk Applicator*
11.45	**Project Management** **Sean Kelly** Director CRM Business Solutions USA	**Performance Issues** **Tony Carter** Principal & Director Tallowillow Enterprises P/L *Innovative Interaction*	**Performance Issues** **Chris Yardley** General Manager Alltech Communications Pty Ltd *Network Performance*
12.30	**Luncheon (ALBERT HALL)**		
2.30	**Wrap Up and Farewell – Lloyd Carter**		
2.45	**7th Australian International Performance Management Symposium Concludes**		

ABSTRACTS OF PRESENTATIONS

Day 1 – Executive Perspectives
Federation Ballroom (North & South Combined), AM Wednesday 19-Feb-2003

Chairman: Lloyd L Carter
Managing Director, MTC AustralAsia Pty Ltd

Lloyd L. Carter is the Managing Director of MTC AustralAsia Pty Ltd. He has been involved with Project Management Systems and Earned Value Performance Management (EVPM) since 1968 when he was assigned as the Production Program Officer in Charge at the General Electric Company in Valley Forge, Pennsylvania, USA. In that position he participated in the review of the first contractor to be validated under what was then called the Cost/Schedule Planning and Control Specification (CSPCS). While in the United States Air Force, Mr. Carter served in various acquisition management positions directly related to Project Management and Performance Management Systems. This included assignments ranging from source selection to contract operation activities.

From 1972 to 1981, he served as Associate Professor of Acquisition and Project Management at the School of Systems and Logistics at the Air University. During this time he was the Director in Charge of the Cost/Schedule Control Systems Implementation and Surveillance Courses. These duties included provision of consulting services to various Department of Defense agencies as well as to the National Aeronautic and Space Agency, Department of Energy and Department of Transportation. Mr. Carter has written or tailored governmental policies, regulations, and contractual requirements to meet the needs of foreign military sales, construction, development, and manufacturing projects.

Lloyd Carter joined the United States Air Force in May 1961 in the enlisted ranks. He was commissioned as a Lieutenant in Aug 1967 after attending University and achieving his Bachelors Degree. He served in various systems acquisition capacities while in the Air Force. His concluding assignment was as Associate Professor at the Air University.

From May 1981 he maintained his own company offering consulting services to large contracting organisations. During this period he was associated with several consulting organisations. These consulting companies included Langford & Associates, Humphreys & Associates, Poore & Associates, Valuation Opinions, Decision Planning Corporation, Earned Value Systems Australia and, currently, Modern Technologies Corporation.

As a private consultant he has designed, developed, and conducted public and in-house seminars on Project Management Systems attended by thousands of students. He has designed and implemented project performance management systems and provided consulting services to over 200 contractor and governmental organisations in the United States, Canada, England, France, Italy, Australia and Saudi Arabia.

Since arriving in Australia in 1990 he has provided long-term consulting support and training to several divisions of Telstra, Telstar, CelciusTech, Australian Department of Defence, Australia Graduate School of Engineering Innovation, Rockwell Systems Australia, Boeing, ACTEW, RLM Systems and Tenix Defence Systems, as well as several short term consulting engagements to various organisations with both defence and commercial orientations..

Introduction to the Symposium

In this introductory presentation Lloyd Carter will present the theme of the Symposium and identify the relationship of the various Presenters, Sponsors and Exhibitors to the concept of Performance Management. He will discuss the definition of Performance Management in the context of the symposium and Performance Management as a profession and/or discipline. Also presented will be the life cycle of performance management activities, relative success rates and reasons for success/failures, and a development paradigm. He will then outline the program and presenters, the sponsors and exhibitors. A most important message is how each individual participant can obtain the most benefit from attending the 7th Australian International Performance Management Symposium.

The Hon. Fran Bailey, MP
Parliamentary Secretary to the Minister for Defence, Australia

Fran Bailey has tirelessly represented the marginal seat of McEwen, as its Federal Member, since March 1996 and previously from 1990-1993. Fran has the honour of being the first Victorian Liberal woman to be elected to the House of Representatives and also the first woman from any party to represent a rural electorate.

She also has the distinction of being only the second woman in the history of the Liberal Party to sit on the House of Representatives front bench, after being appointed Shadow Minister for Consumer Affairs in May 1992.

Fran grew up in Queensland and attended All Hallows College. She attended Queensland University and graduated as a secondary teacher, specialising in English, History and French. Later she returned to study sociology at La Trobe University in Melbourne, focussing on the psychology of Group Dynamics. As well, she designed and conducted field research into family and community lifestyles.

Prior to entering Parliament, Fran established a successful retail business when she opened the first reject china shop in Victoria. Later, she went on to develop a commercial and stud cashmere business, which exported both meat and fibre.

During her first term as a Member of Parliament, Fran served on a variety of committees including the Joint Parliamentary Legal and Constitutional Affairs Committee and was a signatory to their inquiry into Equal Opportunity and Status of Women in Australia.

Fran was appointed by the Prime Minister as the Chairman of the Standing Committee on Primary Industries and Regional Services in November 1996. In February 2000 the Committee published a report, 'Time Running Out: Shaping Regional Australia's Future', following an inquiry into infrastructure and the development of Australia's regional areas. The Committee has also published a report Adjusting to Agricultural Trade Reform: Australia No Longer Down Under', into how Australian industry has adjusted to trade reform.

In June 2000 the Committee published a groundbreaking report into gene technology, 'Work in Progress, Proceed with Caution'. Many of its recommendations were included in legislation. In August 2001 the Committee published a follow-up report on bio-prospecting, 'Bio-prospecting, Discoveries Changing the Future', that highlighted the unique opportunities for Australia to lead the world in certain areas of bio-technology. Fran has been a key-note speaker on Australia's role in bio-technology within a Australia and overseas.

Fran has considerable experience in international affairs:

- In 1990 Fran was invited to visit Russia in September 1990, a volatile time for eastern Europe, and gained valuable first hand experience of the hardship of daily Russian life. She concentrated her time examining problems and progress in agriculture and industry.

- In 1992 Fran was honoured by being awarded an International Fellowship by the United States Government. During her visit, she studied the innovative ways in which the United States was overcoming its problems of high youth unemployment. This is an area that Fran has always been committed to and continues today to work for homeless and unemployed young people.

- In 1996 Fran was chosen to participate in the International Leaders Program which was held in San Diego.

- In 1997 Fran visited China as a guest of the People's Institute of Foreign Affairs. Her visit included several high level meetings such as discussions on trade, wool, humanitarian issues and the future of Hong Kong. She also met with the First Deputy Premier of the People's Republic of China, Mr Zhu Rongji.

- In 1998 Fran was invited to visit the Johns Hopkins Medical Research Centre in Baltimore, USA, as a result of her pioneering work in developing new ways to deliver health services to rural communities utilising recent advances in technology including telemedicine.

- In 1999 and 2000 Fran again visited China as a guest of the People's Institute of Foreign Affairs to participate in meetings on various issues including bio-technology and trade.

Fran was appointed Parliamentary Secretary to the Minister for Defence on 26 November 2001.
Fran has two daughters, Amanda and Annabel.

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Michael John Roche
Under Secretary Defence Materiel
Department of Defence, Australia

Following the merge of the Defence Acquisition Organisation, Support Command Australia and National Support Division on 1 July 2000, Mr Roche became Under Secretary, Defence Materiel of the Defence Materiel Organisation.

Appointed to position of Under Secretary Defence Acquisition, November 1999.

Deputy Chief Executive Officer, Australian Customs Service from May 1994 to November 1999 with responsibility for all Border matters, Information Systems and Technology, Quality Management, Intelligence, Coastwatch and Internal Affairs.

From 1987 to May 1994 he was Deputy Secretary, Department of Human Services and Health, with particular responsibility for Corporate and Information Services, the State Office network and the Therapeutic Goods Administration.

Prior to that he worked as First Assistant Secretary responsible for the Cabinet Office in the Department of Prime Minister and Cabinet and before that in the Department of Health (Corporate Services), the Department of Immigration and Ethnic Affairs (in Corporate and Financial Management and as Regional Director for Britain and Ireland). He has also worked in the Department of Finance and the Treasury on the development of Financial Systems.

David Gray
Managing Director, Boeing Australia Limited

David Gray was brought up and schooled in Zimbabwe (Rhodesia). In 1966 he went to the United Kingdom to study electrical engineering at the University of Newcastle on Tyne where he received a Bachelor of Science degree.

After six months of post graduate work in industry he was sent to South Africa where, for two years, he worked in the power electrical engineering field.

The next two years were spent on an extensive yachting expedition, after which he returned to the power electrical engineering business in South Africa.

Having held a number of senior positions in that field and later on in telecommunications, he and his family immigrated to Brisbane, Australia in 1984.

Back in the heavy engineering field, he became the Chief Executive of GEC Heavy Engineering, and then in 1989 moved to Sydney as General Manager of the telecommunications company Exicom.

After a short time there he was asked to return to GEC and form GEC Marconi (Australia) following the recent worldwide acquisition of Plessey. This was completed and he was Managing Director of that company until August 1995 when he was appointed Managing Director of Boeing Australia Limited (previously Rockwell Australia Limited), where he now works.

David is married with three children (ages 24, 22 and 16) and enjoys playing golf and tennis.

Alan Wakeham
Managing Director, Defence Systems
BAE Systems

Managing Director of BAE Systems Australia Defence Systems Division which operates over 5 sites and employs some 1,200 people covering the design, development and supply of electronic systems in the EW, Communications, Simulation and Missiles & Decoys defence sector.

Previously Alan spent 11 years working for Airbus Commercial Aircraft with the final role of Operations Director in the UK, which covered Engineering, Procurement and Manufacturing

Peter Spooner
General Manager Operations, Ball Solutions Group Pty Ltd

Peter Spooner is the General Manager of Ball Solutions Group, a wholly owned subsidiary of Ball Aerospace & Technologies Corporation (BATC).

Based in Canberra, Peter joined the Ball team in March 2001. He is responsible for co-ordinating the "on-time, on-budget, on-quality" delivery of the geographically dispersed services and products capabilities of the Ball Services Group which are focused on providing project management, systems engineering and logistic analysis services to both Public and Private sector clients. He is also heavily engaged in the acquisition, refinement and retooling of personnel, processes and tools essential to maintaining Ball's capability to deliver leading edge solutions. Peter's extensive Private sector experience in multi-national business (IT, data management, petrochemical) is also being utilized to bring "commercial awareness" to the company's Defence sector teams and to challenge "traditional" solutions developed by these teams.

Over the last couple of years, Peter has been closely involved with Ball's work with the Air Force to develop their Capability Management System (CMS), now being implemented across force elements at the major operating bases and headquarters. This project reflects the Air Force goal of doing business within an overarching mindset of capability-based management. In effect, CMS is Air Force's performance management system. Ball has identified that major benefits can be derived by enterprises that implement an integrated performance management systems such as CMS. The elements of the system are highly tailorable and have clear application to the non-Defence government and commercial sectors.

Peter majored in Finance and Accounting before entering the Phillips Management Development Program. Postgraduate studies have been in IT, human resource management and marketing.

Performance Management: An Executive Perspective
Peter Spooner

Agile enterprises – those that can best adapt to <u>and</u> anticipate their increasingly globalised and volatile operating environment – will be the ones that not only survive but flourish. Global economic ructions, technology spirals, increasing workforce mobility and ongoing statutory changes are some of the factors that make for a challenging environment. A well-engineered performance management system will provide a powerful portal to the current and anticipated future operating environment and thereby help to focus and inform the enterprise. Through that portal, the enterprise can be better steered and positioned to adapt and anticipate, and to manage its overall capability more prudently now and into the future. Of course, in engineering such a performance management system there are several pitfalls to avoid, including measuring but not managing, poor information quality, and being tool-driven rather than needs-driven.

Founded on the pillars of connectivity management, people/resource management, risk management and performance management, an overarching enterprise capability management approach may be key to developing an agile enterprise. Such an enterprise is sure to be strategy focussed. But it will also have the highest regard for optimising its structure and the level of agility it needs to deal with the anticipated future. It will therefore treat strategy, structure and agility as an integrated triad of core elements in its capability management approach. By developing and considering realistic business scenarios, the enterprise capability and its performance can also be continuously assessed and projected into the future. Through this ongoing process, strategic and tactical decisions can be better informed. Diverse but well-considered strategic options can also be developed so they are readily available off-the-shelf, endowing the agile enterprise with significant 'contingency capital'.

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ABSTRACTS OF PRESENTATIONS

Stream 1 : Performance Management Case Studies
Federation Ballroom South, PM Wednesday 19-Feb-2003

Joint Presentation – David Castledine & Martin Skinner

David Castledine
Managing Director
Cfocus Pty Ltd

David joined the Royal Australian Navy in 1979 as a Shipwright (in the days of wooden ships & steel people etc). Seeking a change of scenery, he undertook a Manufacturing Systems Engineering Degree at RMIT in which he majored in Quality and Productivity Measurement. He thesis was an 18 month study at the then AMECON, in which he explored the relationship between these 2 very important business imperatives.

David hung up his uniform for the final time some 21 year after first donning it. He concluded his service as a Marine Engineer Officer, having served in diesel, steam and gas turbine powered ships. His passion however was in the fields of Contract and Project Management, and he cut his teeth in Ship Refit and Repair. His very last role in the Navy was as the Navy Project Manager of the 2 year repair and complete upgrade of HMAS WESTRALIA following the May 1998 Engine Room fire in which 4 lives were tragically lost – a Project which finished on time and under budget.

On leaving the Navy David set up Cfocus Pty Ltd, a Project and Contract Management firm. Primarily servicing Defence, Cfocus currently is assisting Navy with the reorganisation of the Ship Refit and Repair business. David holds a B.Eng (Manufacturing Systems) with honours, and is a member of the IEAust, AIPM and the PMI.

Martin Skinner
Deputy Director – Future Strategies
Department of Defence, Australia

Martin Skinner is presently enjoying a three-year exchange appointment with the Maritime Systems Division in Sydney from the Warship Support Agency.

On completion of his apprenticeship at Devonport Dockyard in the early eighties, Martin spent a few years-managing Electrical Reactor Systems with DG Ships in Bath. Looking for a fresh challenge he slid across to the Executive stream and joined the Royal Naval Stores and Transport Service in 1985 as a commodity manager. Tours including Overseas Sales - where he sold Oberon spares to foreign navies and HMS HERMES to the Indians – RFA Materiel Support and Staff Officer to two DGST(N)'s followed. He then found himself with the British Defence Staff in Washington as the Shipping and FMS Manager with the UK Defence Procurement Office. Responsible for shipping defence materiel as diverse as fasteners and Chinook helicopters, one of his most significant achievements however was leading the British Embassy soccer team to 17 games without defeat against other Embassy teams.

On return to UK, Martin was appointed Business Manager at the Support Engineering facility at Exeter where his brief was to reduce Irreducible Spare Capacity. His next appointment was a 12-month secondment with BMW and Rover in Birmingham. There he led a small team charged with reforming the Power Train support chain away from Rovers' traditional UK suppliers to BMW's on the continent for the new, start of the art, petrol engine manufacturing facility at Hams Hall. So state of the art is the facility that one of its' boasts is that it produces an engine every 39 seconds and is one of the few assets BMW retained after the sell off of Rover.

"Performance Measurement in Australian Naval Ship Refit and Repair"
David Castledine and Martin Skinner

The Royal Australian Navy's major surface Ship Refit and Repair organisation has recently embarked on a significant change management project. Considerable efforts are being expended to standardise the organisation's various business units and to develop new tools and processes, particularly in the area of performance measurement, by which they can more efficiently and effectively conduct business. The presentation will explain the operating environment and the complimentary performance measurement tools that have been developed to measure the performance of all key parties involved in the Ship Refit and Repair business.

Whilst sound business principles have driven these business changes, the bigger picture of the Australian warship build and repair industry is also having its impact on the change process. The presentation therefore also looks at what impact the future direction of ship build and repair industry in Australia may have on the performance measurement systems being set up now for the repair industry.

Patrick Weaver
Senior Consultant
Fallon Project Management Pty Ltd

Following four years full time tertiary education in the UK, Patrick worked on a number of major projects in the UK and Middle East before migrating to Queensland in 1974. In Australia, he worked with several leading construction companies in administration and planning roles until resigning from the position of Chief Planner with Thiess Watkins White Pty Ltd in 1985, to start his own management consultancy business.

Patrick is a Senior Consultant with Fallon Project Management Pty Ltd as well as holding a number of other positions with project management businesses. His areas of expertise include managing the development of project planning and schedule control systems, general management, staff development and technical support. Patrick's consultancy work encompasses; developing and advising on project schedules, managing the development of internal project control systems for client organisations, developing database systems, developing and presenting project management training courses, acting as an expert witness and assisting with dispute resolution and claims management. He is a graded Arbitrator, a trained Mediator and an experienced Negotiator.

Project Control - Trends to Systems Integration
Patrick Weaver

The VIPER Experience

Defence, business and project communities are facing a number of contradictory trends.

- The downsizing and deskilling of their work forces, particularly in the technical support, engineering and middle management areas

- The increase in litigation and lack of tolerance towards any processing errors and/or process omissions

- The need to be ever more efficient with reduced project budgets and shorter delivery timeframes

The combination of these factors is creating pressures on business systems (with particular reference to project control systems) to deliver enhanced efficiency and process integrity whilst minimising the opportunity for errors.

During the heyday of project management software development (in the 1970's and 80's), it was "normal" for businesses to employ project schedulers and other technical and engineering experts in career positions designed to maintain continuity of knowledge within their business. This structure allowed staff to develop deep domain knowledge and to "know" when things were incorrect or missing (as well as having the resources to correct the problem).

In the leaner, meaner environment of the 21st century, these luxuries are no longer possible and project control systems need to be designed to provide checks, balances and sophisticated management reporting as an intrinsic part of their overall processes (as well as being super efficient).

The VIPER system is used to manage and schedule aircraft deep level maintenance programs for the ADF and a number of commercial businesses. VIPER integrates maintenance data, timesheet data, shop floor reports, project scheduling and Earned Value using a number of data integration, management and automated capture processes, which in effect have created an "expert" system. Since its introduction, VIPER has generated cost savings in excess of 30% to the ADF deep level maintenance programmes.

The approach embodied in VIPER allows project management systems to be designed utilising the most effective components (Scheduling, Earned Value, MRP, Timesheet, Data management, Accounting, etc) and then to integrate the data capture, information flows, processing and reporting to ensure prudential processes are followed whilst optimising the overall efficiency of the business unit.

This paper will identify the business drivers that support the development of integrated systems using "best of breed" applications (as opposed to monolithic systems) and identify the reasons why integrated systems can deliver a major boosts in operational efficiency across a wide range of businesses.

Jim Muir
Director of Materiel Organisational Performance Improvement
Defence Materiel Organisation
Department of Defence, Australia

Jim Muir is the Director of Materiel Organisational Performance Improvement in the Materiel Finance Division of DMO. Jim is responsible for performance management and performance improvement, including introducing and sustaining the DMO's Balanced Scorecard and the DMO Business Model. Jim manages the DMO application of the Australian Business Excellence Framework and a range of benchmarking activities, aimed at improving DMO's performance. He is also Project Director for the DMO's Activity Based Costing Project.

Performance Management – the core of the Defence Materiel Organisation's Business Model

Jim Muir

Key words: balanced scorecard, performance management framework, business model, benchmarking, customer supplier arrangements, strategy map, budgeting

1. The DMO Business Model sets out the framework for the conduct of the key business processes that support DMO's business delivery. It describes: the elements of *strategic and business planning, enterprise risk management, budget development, performance measurement, analysis and reporting, and customer-supplier arrangements;* their interrelationship; and timings. Integration of these processes is essential to align our strategies and performance with Government, Defence and internal customer expectations, and to align resource allocations and our people's efforts with our strategic priorities. The model provides the framework under which the individual elements can be fully developed and documented.

2. Performance management is the use of interrelated strategies and activities to improve the performance of individuals, teams and organisations. Its purpose is to enhance the achievement of the Defence Materiel Organisation's (DMO's) organisational goals and outcomes for the government. Effective performance management requires a framework that integrates organisational, business and individual planning, budgeting and performance analysis and reporting. It involves:
   - clarifying strategic objectives using the DMO Strategy Map and Balanced Scorecard (with associated measures and initiatives) and linking these with business plans, Customer Supplier Agreements (CSA), and individual performance agreements;
   - integrating these plans and agreements with the budget;
   - evaluating organisational performance using the monthly Balanced Scorecard, CSA, biannual business plan reviews and benchmarking;
   - periodic performance appraisal of individuals;

3. The presentation will describe the new DMO Business Model and its various elements. Discussion of the balanced scorecard will explain the place of project performance measures, including earned value, in the broader perspective of organisational performance. Current benchmarking initiatives will also be described, along with potential opportunities for future co-operation.

Paul Coles
Project Controls Manager, RLM Systems

Paul Coles is Project Controls Manager of RLM Systems. Paul has worked at RLM since 1998 and has been instrumental in the implementation of advanced performance measurement analysis and reporting techniques developed and applied by the company.

Paul graduated in 1996 with a BA (Hons) Accounting from the Southampton Institute of Higher Education in the UK. Since then Paul has also gained qualifications in Australian Company and Taxation Law.

Project Office Support
Paul Coles

The Jindalee Operational Radar Network (JORN) is an ambitious project at the forefront of technology and one of Australia's largest defence projects. RLM is responsible for the design, development and supply of this wide-area, over-the-horizon radar surveillance network that will provide coverage across Australia's northern and north-western approaches.

JORN is a turnkey contract that also includes construction of all facilities as well as maintenance and support for four years following acceptance. RLM has written over one million lines of code for the project.

RLM faced a challenging task when in February 1997 it assumed management of JORN from the original prime contractor. By applying its considerable engineering and management expertise, the project is nearing completion with formal network testing currently in progress. Final Acceptance and handover to the Commonwealth is due early in 2003.

RLM's performance management processes have played a vital role in ensuring that work was planned in detail, managed in controllable stages and continually reviewed to ensure that work progressed to plan and customer expectations were satisfied. The identification of performance trends and significant variances from the plan was vital for management to make considered decisions and implement effective corrective actions.

The depth and duration of the JORN project has afforded significant opportunities to deliver innovative solutions in performance management techniques. The combination of advanced planning, baseline maintenance and earned value analysis, distributed to management via an integrated database platform, has provided RLM management and our customers a level of visibility into project performance that cannot be provided by non-integrated methods of planning and control.

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ABSTRACTS OF PRESENTATIONS

Stream 2A : Cultural Issues
Centenary Room 2, PM Wednesday 19-Feb-2003

George Davis
Principal and Co-founder
Davis & Dean, USA

George Davis is an enterprise psychologist and co-founder of *Davis&Dean*, a global training company that has trained more than 40,000 project managers in Africa, Asia, Australia, Europe, North America, and South America over the last decade. Thousands of these managers have attended in Australia – Adelaide, Canberra, Melbourne, Perth, Sydney, and elsewhere. His company develops computer-based training workshops known as *"Flight" Simulations for Leaders™* that immerse participants in high-energy, compressed learning experiences for deep, lasting learning.

George has two professional interests that bear on performance management and improvement. One is to research and apply learning theory and neural network theory to adult learners. The other is to apply individual, personal transitions as the implementing mechanism of successful organisation changes.

George comes from the real world. He held line, staff, and executive leadership positions for more than 30 years in enterprise and government, in some of the world's largest companies as well as in entrepreneurial ventures. His experience is founded in the aerospace and defense industry followed by many years in electronics and software design and manufacturing companies.

He speaks to industry and government groups and to professional associations around the world, including several appearances in Australia, and he continues to author leading-edge workshops and books for strategic-level leadership learning.

George holds a BA in Experimental Psychology, an MBA in Quantitative Management, and is currently writing his dissertation for a Ph.D. in Psychology.

Creating a Performance Management Culture
George Davis

This paper is a practical guide to creating a *sustainable* culture in a *volatile* environment, surely one of the paradoxes of our time, and one of the great challenges of 21st century strategic managers.

More specifically, strategic managers are confronted with a dilemma – how can we create conditions for long-term performance at the same time we are reacting to short-term surprises? This calls for a new conception of how organisations work, a new conception held by all the people who are part of the organisation, and that means creating a new culture. One thing we know – we do not have the luxury of waiting for a culture to develop in its own way at its own speed. We are called on to find ways to create cultures intentionally and on a predictable timetable.

Most organisation cultures do not align with the principles of Performance Management. And even though a culture of Performance Management is extremely rewarding to an organisation and to those around it, it does not happen by itself. Such a culture is created. It is created purposefully and intentionally. Its creation can be viewed as a project if we like, with a beginning, an envisioned end, with inter-related and inter-dependent tasks being accomplished along the way. A performance management culture can be created on a timetable, within a budget, and designed to meet desired performance criteria.

There are two ways to intentionally create a culture of Performance Management, and both will be discussed in this presentation. The first requires foresight, thought, and planning. It is developed from the ground up, and from the beginning involves the people affected by it. For them there will be new knowledge that can be applied as new skills. In their process of learning new knowledge and skills, they will naturally change their beliefs about organisations and performance management. The resulting culture is effective and sustainable. This method is too rarely used.

The more often used method to create an organisation culture is for a small, select committee to design it clandestinely and under the sponsorship of a senior executive, who then announces the "new cultural imperative" to an unsuspecting work force. Because this is the more common method of cultural change, we will discuss how to make it work – including the long, chaotic transition process in which people learn to cope with the new ways.

The author has decades of experience working with clients who have created cultures both ways, and will offer practical, useful guidelines that can be applied to attendee's workplaces the next day, as they endeavor to create Performance Management cultures, and as they wrestle with the paradox of sustainability in volatile times.

Pankaj Kashmiri
Project Manager – eInfrastructure
Venture Infotek Global Pvt Ltd
India

Pankaj Kashmiri is working for Venture Infotek Global Private Limited (VIGPL) as Project Manager – eInfrastructue. Company has successfully devoted its founding years in building the massive and largely scalable infrastructure for enabling electronic payments in the country. Company has practically built the Indian card processing industry and today it command an impressive 76.9% of the market in terms of customer base. VIGPL is India's only consumer payment processing company providing integrated end-to-end card payment processing solutions.

Pankaj holds Bachelor's degree in Chemical Engineer. In his short career span of 8 plus years, he has worked in some of the core industries like:

- *Gas & Oil refineries*
- *Thermal & Gas Power Plants*
- *Trading House*
- *Multi media*
- *Software*
- *Financial Services*

He has been involved in executing successfully projects which, consists of Multicultural and Multi National Teams. His understanding of project management has made him work in diverse fields, as exposure to challenges of varied nature helps in delivering, out of box solutions.

Some of the names he has worked closely ---Teledyne Brown Engineering (U.S.A), Diffusion Alloys (U.K), GEC Alsthom (France) , TheFirstResort (U.K), Economic Times (India) ,BNP – PARIBAS (France), Hindustan Petroleum Corporation Limited (I) etc.

He has focused on Team Based De-layered Structures and Organisational Development for developing competencies to deliver exceptional performance under fierce competition through transforming the Culture and Mindset for Strategic Changes.

He believes Project Management in Highly technical environment is challenge, as one has to not only think at swift pace, but act and deliver too ……..with in budget…..with in time.

Cultural Change
Pankaj Kashmiri

The increasing globalization of the markets that started in the 1990's clearly demonstrate that today, companies can no longer afford to ignore the importance of cross-cultural management – not only for overseas assignments – but also for the successful management of culturally diverse teams at home.

Identifying and bridging these cultural differences - particularly through training and team development - is the key objective of CROSS CULTURE MANAGEMENT.

The people of the world are organised into communities and nations, each in its own way, according to its resources and cultural heritage. There are similarities among nations, but there are also significant differences. These differences may be social, economic, political, ethnic, and so on. Whenever an organisation expands its operations beyond the geographic boundaries of the home country, it faces the challenge of blending various cultures together and managing the cross cultures.

Time and distance are rapidly shrinking with the advent of faster communication, transportation and financial flows. Organizations are turning global, with their businesses set across many countries. For this purpose, the organizations need to understand the cultural aspects of the particular country and develop its management philosophy accordingly. Each country has a distinct value system, attitudes and culture prevailing there, which may result in various barriers to doing business in the form of:

- Language
- Attitudes
- Socio – Economic Aspects
- Values
- Behaviour
- Demographic condition

Organizations need:

- to have a company-wide vocabulary to ensure that the knowledge is correctly understood;
- to share and re-use their knowledge among differing applications for various types of users; this implies being able to share existing knowledge sources and also future ones;
- to create a culture that encourages knowledge sharing.

Company wide common vocabulary is established only when right Culture is developed. A Culture where employees speak common language, work in team not as an individual and share best practices to develop intellectual capital within the organization. People are the key to gaining Competitive Advantage in the global market. Culture obtains the best value from people.

Excellence and Competitiveness go hand in hand, and require a Mindset and Cross–Culture Management where all employees are encouraged to share Knowledge and transfer technology across industries.

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ABSTRACTS OF PRESENTATIONS

Stream 2B : Governance
Centenary Room 2, PM Wednesday 19-Feb-2003

Christopher Dellit
Director
Catalyst Consulting Pty Ltd, Australia

Chris is a Director of Catalyst Consulting Pty Ltd which provides independent consulting and legal services to private, public and non-government sector organizations in the Asia Pacific region in the following areas:

- Alliances, partnering and consortia facilitation, review and interventions

- Governance and compliance design and development

- Regulatory submissions, inquiries and investor services.

Admitted to legal practice in 1989, his career traverses private legal practice in Hong Kong and Sydney as well as regulatory, in-house counsel and consulting roles. He has substantial experience in capital markets and financial services regulation law and business processes, having worked with the Australian Securities Commission (now ASIC) and Permanent Trustee's funds management and structured finance areas. His clients include investment banks, financial services and technology providers. Chris has also worked in private practice in Hong Kong for a global UK firm (Lovells), at a premier Australian law firm (Minter Ellison), and with a global professional services firm (Ernst & Young). He is a member of the Australian Compliance Institute and has lectured at the University of Technology Sydney and the University of Sydney.

Riding the Tiger: Governance Issues for Networks
Chris Dellit

Governance as effective decision making on organizational risk and opportunity is complex and challenging enough when focused on the organization itself. Just where the risk and opportunity for those with governance duties lies can also be obscured by evolving business structures and relationships. Where the company, government department or organization is involved in a strategic alliance or joint venture with other entities the range of governance issues and the frameworks for their management form an additional layer of quite different governance considerations for parent and alliance governors at the project, intra-organizational and portfolio levels. Directors and executives on such alliance panels have differing commercial imperatives but common interests in avoiding the risks presented to the success of the venture or cooperative process and to their own entity through project failure, performance contagion and inability to monitor, measure and exit the alliance when necessary. At the same time, processes and products within an alliance or joint venture context represent corporate opportunities for co-specialization, learning and internalization to be appropriated for their organizations by executives at both the governance panel and parent company levels. Failure to capitalize on such opportunities and incorporate them into strategic planning and underlying organizational policy implementation can undermine co-operative behaviour between alliance or venture partners as well as be considered less than diligent in some quarters and therefore an issue for good governance. This paper critically examines concepts of good governance, explores a practical strategic approach to governance based on balanced scorecard methodology and applies this framework to the formation, management and exit issues relating to alliances, ventures and other

Diane Barbeler
Director
The Couch House Leadership Centre Pty Ltd, Australia

Diane Barbeler is a founding Director of The Coach House Leadership Centre Pty Ltd in Melbourne, Australia.

The Coach House Leadership Centre works with people and organisations to enhance communication and collaboration, through a process of assessment, delivery and review. This process works towards developing clients' capacity, performance and ability to survive difficult times. The company has a special interest in helping create sustainable futures for communities, organisations and individuals.

Diane Barbeler has extensive consulting experience in Information and Communications Technology in both public and private sectors undertaking liaison, diplomacy and business facilitation activities. Her areas of specialisation are as an interface between diverse interests within, and between, businesses, and in IT project and issues management.

In 2002, Diane completed a Masters of Applied Science in Organisation Dynamics. Her masters report was based on a collaborative action research project involving two organisations that have formed a long-term Alliance Partnership.

'Partnerships! But who's minding the baby?'
Diane Barbeler

Organisations are complex systems that must be adaptive and creative to survive in the volatile environment in which they operate. Organisations are also inseparable from the society within which they function. Partnerships and relationships are integral parts of this society. This paper argues that a dialogue is needed about the dynamic between the concepts of 'partnership' and 'relationship' within and between our organisations.

The introduction of the Alliance Partnership model to Australian industry is relatively new. This model is defined as *The cooperative development of successful, long-term, strategic relationships, based on mutual trust, world-class and sustainable competitive advantage for all the partners; relationships which have a further separate and positive impact outside the partnership/alliance* (Lendrum). The model is seen to go beyond traditional 'master-servant' and 'joint-venture' partnerships to a new synergistic relationship.

Three values are key to an Alliance Partnership's success: mutual trust, collaboration and interdependence. However, what happens when these values are being developed? And how can we determine the characteristics of 'the baby', the primary task that 'it' represents, and 'its' relationship with all the partners in an 'Alliance family'? Are we only prepared to deal with the descriptive, commercial reality of the 'venture' or 'strategic alliance' and not the roles, boundaries and partnerships integral to, and impacting on, any relationship?

This paper examines these questions. It argues that the word 'partnership' conjures up an illusion of an intrinsic relationship without doing the work to ensure the effective establishment and sustainability of the relationship. It proposes an interactive experience for attendees.

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ABSTRACTS OF PRESENTATIONS

Stream 3A : Balanced Scorecard
Federation Ballroom North, PM Wednesday 19-Feb-2003

Mike Cowper
Director BPM Solutions
CorVu Australasia Pty Ltd

Mike Cowper is Director BPM Solutions, CorVu Australasia Pty Ltd

Mike is an Economics graduate from the University of Sydney with Honours in Economic Statistics. His expertise in data analysis using computer technology led to positions with OTC, Amatil and Management Science America (MSA) before becoming a consultant in the mid 1980s.

During his five years with CorVu, he has worked as a consultant with a large number organisations to "bridge the analysis gap" by designing and implementing strategic performance management systems which identify and measure key performance indicators.

He is also currently involved in overseeing the development of CorVu's suite of integrated strategic management systems.

Maximizing the use of technology to drive strategic performance management systems
Mike Cowper

- ✓ Aligning technology to cope with an adaptive performance management system
- ✓ Effective Strategic Performance Management Systems – using the Balanced Scorecard to implement strategy
- ✓ Current Business Challenges – translating strategy to business and relevance to technology
- ✓ Case Studies – successful implementation experiences
- ✓ Resolving Common system issues and problems
- ✓ Unveiling successful practical approaches to technological business solutions that support and propel the business forward

John Schlichter
Principal
Agylon, USA

John Schlichter is a principal of Agylon, a firm specializing in strategic planning services and project portfolio management consulting. He earned both his Bachelor of Art's and his Master's in Business Administration from Emory University. For the past 7 years, he has been active in project management maturity at the organizational and personal levels, and in 1998 he was chartered by the Project Management Institute to direct the development of an Organizational Project Management Maturity Model Standard, per http://opm3.intranets.com. He has implemented PMO's and other project management solutions in many organizations, including BellSouth, Technology & Process Consulting, Metamor Worldwide, Prudential, and The Weather Channel. He has presented on project management topics throughout the world to many organizations, including 3M, Accenture, AT&T, Boeing, Compaq, Deutsche Telecom, EDS, Ericsson, FedEx, Hewlett Packard, Honeywell, IBM, KPMG, Logistics Management Institute, NCR, Nortel Networks, Pricewaterhouse Coopers, Principal Financial, State Farm Insurance, Unisys, UPS, the US Department of Energy, Wells Fargo, and many others organizations, as well as at the PMI's Seminars & Symposium's, the PMI Europe Conference, PMI Chapters in America and Europe, and the IPMA's World Congresses. Mr. Schlichter served on the PMI's 1998 Standards Committee and the 1999 Standards Member Advisory Group, and was a co-founder of the PMI's Metrics Special Interest Group.

Performance Management for Uncertain Business Environments: A Balanced Scorecard Implementation of the Analytic Hierarchy Process to Prioritize Project Portfolios

John Schlicter & Ernest Forman

Business environments have never before been as complex and volatile as they are today, yet today's measurement systems focus on past performance, consist of mainly financial indicators, encourage short-term strategies, and fail to provide long-term strategic management capabilities. While most performance measurement systems are ill equipped to support organizations in today's uncertain business environment, companies like Agylon are implementing powerful performance management solutions for complex, adaptive organizations utilizing proven tools like the Balanced Scorecard and the Analytic Hierarchy Process to enact business strategies through project portfolios. The Balanced Scorecard (BSC) is a set of financial and non-financial measurements relating to a company's critical success factors. The BSC is a proven approach to strategic management, and it imbeds long-term strategy into management systems through the mechanism of measurement. It translates vision and strategy into a tool that effectively communicates strategic intent and motivates, while tracking performance against established goals. The BSC is significantly more effective when integrated with the Analytic Hierarchy Process (AHP), developed at the Wharton School of Business by Thomas Saaty. AHP allows decision makes to model a complex problem in a hierarchical structure showing relationships between the goal, objectives (criteria), sub-objectives, and alternatives. Uncertainties, risks, and other influencing factors can be included. By combining the BSC with AHP, Agylon transforms a powerful theory into a practical performance management system for managers coping with complex and volatile business environments.

Key messages of the paper include:

- Project portfolios are temporary organizations designed to deliver change, while coping with complex and changing environments.
- A Balanced Scorecard can be used to translate organizational vision, set goals, link performance measures, align projects, allocate resources, and facilitate learning. The processes of the Balanced Scorecard require decisions that are suited for the Analytic Hierarchy Process.
- Managers must organize for the future, and use more than financial objectives and measures for project portfolio optimization.
- A company's risk-management strategy should be integrated with its overall corporate strategy, and alternative projects should be evaluated vis-à-vis the contribution of risk that they introduce to the overall portfolio of projects.
- AHP is an effective method for integrating a variety of qualitative and quantitative objectives and measures to prioritize projects and optimize the project portfolio.

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ABSTRACTS OF PRESENTATIONS

Stream 3B : Strategic Planning
Federation Ballroom North, PM Wednesday 19-Feb-2003

Aubrey G. Gonsalves - BBBA
National Product Manager
Ocean Group, Australia

Aubrey, a former Logistics Officer, joined Ocean Group as National Product Manager in January 2001 and specialises in Performance and Business Management. During his 12 years in the Royal Australian Air Force, Aubrey had been responsible for various functions including Logistics Operations, Finance, Procurement and Project Management. Aubrey was the product visionary for the SMART4PM solution and his team transformed Support Command Australia (Air Force)'s performance reporting from a manual, cumbersome process to a streamlined system with the introduction of the SMART4PM solution. This optimised reporting process, saving each business unit approximately 5 man-days per month. In performing these varied roles, Aubrey has developed a practical understanding of the needs of both the operators and senior executives, and when combined with sound theoretical knowledge translates into superior delivery of practical solutions.

Multi Level Performance Reporting
Aubrey Gonsalves

Most organisations do a good job of Strategy Planning however they run into difficulties when it comes to implementation and sustaining the goals and objectives.

What they need is a Strategic Plan that is structured to cover the grass roots (engine room). Not just a plan put together by the executive.

The Strategy needs to be sold to each organisational area to achieve the required outcomes.

To facilitate these objectives the Strategy process must have a mechanism to

- Capture Data
- Feed it into the system
- Be distributed to respective areas
- Facilitate accurate reporting and feedback.

This allows individuals to see how their contribution compliments the overall strategy.

These basic back end requirements are often overlooked in the preparation of the plan and become a major stumbling block as the administration of improvement plans outweighs the benefits.

Geoff presents a practical approach to the challenge of solving the multi level performance reporting problem that is often an obstacle to successful Strategic plans.

Quentin Redman
Snr Manager/Eng Fellow
Raytheon Missiles Systems, USA

Raytheon Electronic Systems
Sr. Manager/Engineer Fellow
Board of Directors ISPA
Education:
California State University at Long Beach,
B.S., 1970, Engineering Technology
West Coast University
M.S., 1976, Financial Economics

Professional Summary:
Quentin Redman is the Sr. Manager/Engineer Fellow of Advanced Systems Economic Analysis for Raytheon Missiles in Tucson, Arizona. He is responsible for developing and providing cost information to support program managers, engineers, and IPD teams in making sound business, programmatic, and design decisions and for establishing cost as a key parameter in the design process through the evaluation of economic impacts associated with various concepts and alternatives. This includes Total Ownership Cost, Design To Cost, Life Cycle Cost, Risk Analysis, and Cost As Independent Variable. Over 30 years of experience in Economic Analysis.

Prior to his position as Manager, Advanced Systems Economic Analysis, Quentin was Manager of Contracts and Estimating for the Advanced Cruise Missile Program for General Dynamics. He was responsible for supervising and administering the varied activities performed by Contracts and Estimating departments that included contract negotiations, proposal definitizations, data collection and cost modeling.

Previously, Quentin was Group Chief Engineer at Martin Marietta Denver Aerospace Advanced Development Division responsible for standards, Design To Cost, Life Cycle Cost, process planning and industrial engineering.

Putting Cost in the Cost verses Performance Trade-Off

Quentin Redman
Advanced Systems Economic Analysis
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George Stratton
Advanced Systems Economic Analysis
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Cost Performance Trade-Off analysis is fundamental to the Performance Measurement process. A cost performance trade study, is a procedural search for a design solution that balances achieved systems performance, effectiveness and cost against the desired or required values for these features and the system. Within this paper we will discuss the methodology and rational behind that methodology for preparing the cost estimates to be utilized within these trade-offs. Also included is a short discussion on appropriateness of cost modelling and analysis tools.

The Cost Performance Trade Study Cost Performance Trade-Off analysis is fundamental to the Performance Measurement process. A cost performance trade study, is a procedural search for a design solution that balances achieved systems performance, effectiveness and cost against the desired or required values for these features and the system. Note, this is an engineering philosophy where in all these aspects of the system (performance, effectiveness, cost and often schedule) are considered during systems requirements definition and subsequently system design. Implementing state-of-the-art methods and tools for planning, information, management, design, cost trade-off analysis, and modeling and simulation significantly improve the effectiveness of system design process. As a contractor, it is incumbent on us to become knowledgeable of the capabilities of the tools, to integrate them into our internal tool sets, and to improve service to our customers.

This "trade-off" process is the process of evaluating cost reduction ideas and alternatives effecting system performance factors for their impact and comparing the result with the original "baseline" design. Trade studies document efforts to reduce cost when evaluating design alternatives. Trade studies are an integrated product and process development (IPD) function and should involve specialists from all design and support functions including the "ility" support groups.

System cost, schedule, and performance are the three classic parameters in all product and system acquisitions. Traditionally, analyses of variations in system performance characteristics were conducted to obtain the resultant effect on projected system cost and development schedule. To take full advantage of the systems design process, design trade-offs which evaluate system requirements versus costs must be conducted at an early design stage to succeed in making cost an independent rather than dependent variable.

Performance parameters can be analysed against design, testing, manufacturing, operations and support, training requirements, and overall life-cycle costs. The overall evaluation criteria should consider all aspects of the design including mission capability, operational safety, readiness, survivability, producibility, testability, manufacturing costs, schedules and other appropriate factors. Design trade studies should be used to direct the effort that provides for balanced product design, considering cost, schedule and performance. Figure A is an example the authors prepared for one such trade study. The trade studies should include consideration for the product, production processes, special tooling, special inspection equipment, performance and cost. The absolute requirements stated in the system specification form the baseline effort. However, design margins are needed for every requirement, and it is intended that the design teams have the flexibility to address how much margin is applied within the program constraints (cost and schedule). The bottom line is that puthe absolute requirements must define a system that meets the customer's needs, but every effort should be made to improve performance/cost/schedule within program constraints and/or identify elements which require additional resources.

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ABSTRACTS OF PRESENTATIONS

Day 2 – Executive Perspectives
Federation Ballroom (North & South Combined), AM Thursday 20-Feb-2003

Eleanor Haupt
President , PMI College of Performance Management
USA

Eleanor Haupt serves as the Earned Value focal point at Aeronautical Systems Center, Wright-Patterson Air Force Base in Dayton, Ohio (U.S.A). She is responsible for policy development, guidance, training, and direction for the application of Earned Value Management on all Air Force programs at the center.   As part of her current job responsibilities, she develops and presents a wide variety of training materials and handbooks on EVMS basics, analysis, and integrated baseline reviews. Eleanor serves on the Air Force Earned Value Integrated Product Team. She is also a member of a team chartered to develop an Earned Value Practice Standard, and also served on a government/industry team that prepared an Over Target Baseline guide. She has over 23 years of acquisition experience working for the U.S. Air Force, Navy and Army, and has supported numerous programs in financial and cost management.

Eleanor was elected and currently serves as President, PMI College of Performance Management. Prior to that, she served two terms as Executive Vice President. The College of Performance Management is a knowledge based component of the Project Management Institute and is dedicated to promoting excellence in global project performance management and providing professional development opportunities for its over 1,300 international members.

Adrian Inch
General Manager, Program & Project Management
Telstra

Adrian currently leads a professional services business that provides project management services within Telstra for the development and implementation of new products and technology solutions. As a full service integrated telecommunications company these solutions span the needs of business and government, consumer, international, wholesale, regional and rural Australia.

Adrian has 18 years experience in the telecommunications industry leading large scale integration projects and managed service contracts across the enterprise and joint venture environments.

Richard Pilcher
Snr Manager, Project Management Services
BHP Billiton, Australia

Richard graduated in 1971 with a BSc Mechanical Engineering from the University of the Witwatersrand in South Africa. The first 12 years of his career was spent at various mining and minerals operations. Since then Richard has held a number of positions in engineering and projects. He was Chief Executive of Billiton's in-house project and engineering group until it was sold in 1997. Prior to the BHPBilliton merger he led Billiton's Project Development Group. He participated in the team that was responsible for integrating BHP and Billiton's project management functions. His extensive experience encompasses a broad range of mining and metals projects mainly in Southern Africa, but in recent years internationally as well, both from an Engineering, Procurement, Construction Management perspective and in providing assistance, guidance and governance services to major projects. He is currently responsible for BHPBilliton's Project Management Services group.

David Norris
Director Application Management Services
Commercial Delivery, IBM GSA

David Norris joined IBM in 1979 and has worked in many roles from marketing to application programming.

David has been with the company as it has transitioned from a Hardware and Software company into a company built around Information Technology Services. During that time David has held leadership roles in IBMs Outsourcing and Systems Integration businesses. David's current role is a Director of Application Outsourcing which employs around 3,000 people in Australia/New Zealand. David is a certified IBM Project Manager and has an Honours degree in Physics from London University.

Ross Beattie
Industry Development Manager
Software Engineering (National) Ltd

Appointed as Industry Development Manager of Software Engineering Australia (National) in June 2002, Ross Beattie has 23 years of experience working with a wide variety of software companies and has held many management and technical roles in that time. He has had a broad and deep immersion in the complex issues associated with the development and acquisition of sophisticated software capabilities by corporations and government, covering everything from desktop application software, to embedded real-time software for defence and aerospace applications. This experience has enabled him to assist S|E|A| to develop its vision of Software Governance. Ross Beattie received his B.E. from the University of Technology, Sydney.

Taking Australian software to new heights - the impact of Software Governance
Ross Beattie

Software is a vital asset in most modern companies and yet, it is still said to be "one of the few markets where buyers actually accept faulty products" (Computerworld 3 July). Last year, Australian companies spent AUS$23.7 billion on information technology (IT) and according to BRW Magazine *"most of them had only a vague idea of why"*. (BRW, June 18, 2002). There is obviously room for improvement.

Governance in general, is fairly well and widely understood, however, Software Governance is viewed as a major gap in companies world-wide – mainly this is because software has some risky traits of differentiation which require stakeholders to pay special attention.

Software Governance, a parallel element of corporate governance, is the controlling framework for maximising assurance and minimising risk associated with software systems. It can help to bridge the gap in understanding between the business culture and the technology culture within an organisation and through this, align business goals with the IT goals and objectives.

In today's market where Boards and Directors are being held liable for failed IT projects, and competition is ripe, addressing the issue of software and IT governance is essential. More than this, Software Governance has the potential to drive the entire software process improvement industry in Australia.

The implementation of Software Governance can significantly improve the capability of acquirers by making them more intelligent consumers. This has the side effect of motivating the developers to improve their capability as greater demands from educated acquirers become more common. Thus, through the introduction of Software Governance, the industry creates its own self-perpetuating loop of improvement for all parties and in effect, can drive software development and acquisition in Australia to new heights.

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ABSTRACTS OF PRESENTATIONS

Stream 4A : Investment Management
Federation Ballroom South, PM Thursday 20-Feb-2003

Mark Heath
Managing Director
MBH Management Pty Ltd, Australia

Mark Heath is managing director and founder of MBH Management Pty Ltd, a change management and project management consultancy. Mark has presented on the need for better project selection and investment decision making at several associations and symposiums around Australia including the 6th Australian Performance Management Symposium in Canberra, 2002, The Australian Institute of Project Managers educational Seminars (NSW Chapter), September 2002. He has also written many papers on the subject of ROI and Investment evaluation. Most of these can be downloaded at www.mbh.com.au. Included is an article explaining in layman's terms the concept of option pricing. This article will be published in the 2003 Australian Business and Investment Explorer journal. This journal is a yearly publication that also includes articles from recognised business leaders such as Don Stammer and Peter Reuhl.

Mark, along with his MBH colleagues, has put together a robust methodology for benefits management that ensures the selection process for projects and investments in generally do not just end with the board signature but are constantly re-assessed. This process has been adopted and refined over the past 5 years at many companies and has removed significant doubt and uncertainty around the quality of investment decisions at these companies.

Some of the companies who have utilised Mark's services over the past 5 years include:

- British Airways
- Telstra
- Rothschild
- MBF
- Westpac
- Electrolux
- Brambles
- Kellogg's
- Perpetual Fund Services
- Twynam Group

Initiatives covered at these institutions include managing change to standard project management and performance management practices, implementation of balanced scorecard, business intelligence and knowledge management systems and processes as well as improved financial modelling feasibility studies.

Investment Decision Making – the crucial first step to successful performance management
Mark Heath

The last 24 months has seen an extraordinary amount of corporate collapses and high share market volatility. Companies once seen as blue chip or growth telco stocks have produced massive losses, demonstrated various levels of fraud and negligence and have provided a wealth of material for the finance and business community to comment on. Most of this commentary has focused on the lack of independence within the corporate governance framework, the way boards and management have been remunerated through options, the level of negligence and direct fraud that has been committed by boards and senior executives and the poor performance of auditors in carrying out their duties. However, to limit the debate to these things is to potentially miss the crucial element to why all companies both good and bad, produce poor results. Poor results are created through poor investment decisions and/or poor implementation of those investment decisions.

Examples of good companies making poor investment decisions includes British Telecom and Vodafone paying over the top prices for 3G in the UK. Examples of poor companies making poor investment decisions are HIH's investment in FAI and one.tels investments in Europe. In all cases, it did not matter how well the investments were implemented (ie: how well the projects that resulted from the investments were managed), as the investment was never going to cover its cost of capital in the first place. This paper and presentation will explore the process that is required to ensure the risk of poor investment decisions is reduced and the process that ensures that when poor decisions are made, management act quickly to reduce the damage that is created. In both processes, the value of options will be explored. There are three options senior management face every day of their working lives. They are:

- Hold and maintain
- Invest
- Abandon

In the financial world, these options represent respectively, holding a call, exercising a call option or exercising a put option. This parallel between the financial and the physical enables management to use financial theory to assist them in decision making. It is possible for management to look at the value of the income stream from holding the assets they already own, investing further in those assets or selling those assets at any point in time any day of the week. This can be done at a macro company wide level (eg: merger, de-merger, acquisition, complete sale), or a micro level (eg: Expanding a data warehouse, purchasing new plant and equipment, selling existing plant and equipment etc). If the financial world values financial options every day, why don't companies value their real options every day? The reason is they don't know how (see economist article "keeping your options open dated October 2001). This presentation will describe in detail the option pricing process. It will then look at 3 examples of poor investment decisions:

- The NAB's investment in Homeside
- British Telecom's Investment in 3G
- HIH investment in FAI

For each case study, the presentation will look at the Investment fundamentals using the numbers that were known at the time (ie: not excluding the amounts for fraud and embezzlement that were on some occasions, discovered at a latter point in time). It will demonstrate the value of option pricing and how a properly executed option pricing policy would have prevented the problems that occurred.

Orest John Wasyluk
Office of Capital Policy, Planning & Strategy
Department of Veterans Affairs, USA

Mr Orest John Wasyluk has been with the Department of Veterans Affairs since 1981. Prior to that, Mr Wasyluk worked for Health Systems Agency as a Strategic Planner. He previously had his own consulting firm in Seattle, Washington.

Mr Wasyluk served as the Special Assistant to the Acting Secretary of the Department of Veteran's Affairs from September 2000 through December 2000. He works in the Office of Asset and Enterprise Management, part of the Office of Capital Policy, Planning and Strategy under the general supervision of the Principal Assistant Secretary for Management.

He is one of three primary architects of the capital investment methodology used by the VA. He served as the Contracting Officer's Technical Representative in the development of the investment process, which provides staff support to the Capital Investment Board (CIB) and the Capital Investment Panel (CIP). He served as the technical specialist and primary liaison for the contractor in developing the initial Capital Investment Survey and the Capital Investment Methodology Guide to provide directions, definitions, and training materials and make it more user friendly for VACO and field staff. He directed the development of four Microsoft based electronic templates (Cost Effectiveness Analysis; Risk Analysis; Alternatives Analysis and Earned Value Analysis). Orest serves as faculty for each investment methodology presentation made in VA. The VA was invited to demonstrate their process and evaluation tools for GSA, the Department of Navy-Bureau of Medicine, Indian Health Service, Customs, HHS, Treasury, and IRS. Several federal agencies have since adopted the methodology and evaluation tools. He also participated in briefings to the Ministry of Patriots representative from South Korea and the Minister of Veterans from Bosnia.

Prior to the July 1, 2001 reorganization, he was the Director of the Staff Offices Resources Board (SORB). The program had total resources exceeding $12 million. In addition, Orest was responsible for reviewing 22 Veterans Integrated Service Network operating plans for the minor construction program that has an annual budget in excess of $175 million. Orest also had Budget oversight responsibility for the State Extended Care Program which has a budget of $90 million for FY 2000. Orest was responsible for providing oversight with recommendations to the Deputy Assistant Secretary for Budget.

Prior to his current position he worked as Health Care Facilities Specialist in the VA Central Office, and a Health Systems Specialist in the field, and as a Project Leader in the Office of Facilities Management. He was responsible for the planning of several major construction projects. He assisted in planning the replacement medical center at VAMC Detroit, estimated at $275 million, and the largest contract award in the history of VA. He was also the lead planner for the VAMC Dayton new 476-Bed Tower with an estimated project cost of $88 million, and the VAMC New York Clinical Addition at $120 million.

He has co-authored an article "Automatic Consensus" that appeared in the May 2001 issue of 'Contract Management' a monthly magazine of the National Contract Management Association.

Mr. Wasyluk graduated from Ohio State University and received his Master's Degree from the University of Washington.

Introducing a new capital investment methodology into the Department of Veterans Affairs (VA)

Orest John Wasyluk

Background

VA serves over 25 million veterans and had a budget of $51.7 billion in Fiscal Year (FY) 2002. The capital asset distribution was over $2.9 billion. Federal capital investment decision-making in the United States has undergone profound changes in the wake of the Government Performance Results Act and in keeping with the President's reinvention and reengineering paradigms. VA's capital budgeting process was characterized as "stove-pipe planning." Planning was nearly vertical within each of VA's major divisions with limited integration among the different Administrations (i.e., VHA, VBA, NCA, and Staff Offices). Each year, the prior year's budget was adjusted by the rate of inflation as well as any special projects that might be required, and then submitted to Congress. From its initial implementation in 1997, VA's capital investment process has evolved from a vertical stovepipe process to one that is horizontally integrated across the Department. VA has incorporated 20 of 28 capital investment best practices into their blueprint for future capital investment requests. A vital aspect of the process involved developing a standardized application that eliminates duplicative requests for information. In addition, VA developed of four Microsoft based electronic templates (**Cost Effectiveness Analysis; Risk Analysis; Alternatives Analysis; and Earned Value Analysis**) that are accessible via the Internet/Intranet. Also a Capital Investment Methodology Guide was developed to provide directions, definitions, examples and training materials to make process and templates more user friendly for VA Central Office and field staff.

The Department's new capital investment planning process has two parts: Formulation Review and Execution Review. **Formulation Review** is comprised of three phases: Functional Development, Technical Review, and Strategic Review.

The **Execution Review** occurs once funds are appropriated. Prior to the obligation of funds, the Capital Investment Panel reviews proposed investments to ensure they are still needed and the planning and financial assumptions upon which they were based are still valid. Subsequently, progress is tracked using EVA templates.

The Multi-Attribute Decision Model

VA uses Analytic Hierarchy Process (AHP), which is a multi-attribute decision modeling technique that allows VA decision-makers to consider a number of diverse decision criteria, based on VA's Strategic Plan, in reaching a capital asset decision. VA's model combines evaluations on both quantitative and qualitative criteria.
External Interest

VA's capital investment planning process has generated significant interest outside the Department. This has generated requests for briefings and demonstrations from other federal agencies and at their request VA has provided presentations to the Department of Navy, Bureau of Medicine, Internal Revenue Service, Health & Human Services, Indian Health Service, Government Services Administration, Social Security Agency and Treasury.

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ABSTRACTS OF PRESENTATIONS

Stream 4B : Performance Management
Federation Ballroom South, PM Thursday 20-Feb-2003

Lynda Bourne
Senior Project Manager
Mosaic Services Pty Ltd, Australia

Qualifications

- Project Management Professional (PMI USA)   PMP
- Candidate for Doctorate of Project Management (RMIT – Australia)
- Bachelor of Arts (Hons), Deakin University   BA (Hons)
- Graduate Diploma in Computing, Deakin University   Grad. Dip.
- Certified Member (Project Management), Australian Computing Society   CMACS

Professional Experience

Lynda is a Senior Project Manager specialising in the implementation of IT projects within the telecommunications sector. Her current role is within Telstra's Infrastructure Services Division where her projects have focussed on improving Telstra's efficiency in the delivery of projects and products.

Prior to rejoining Telstra in 2000, Lynda worked as a Senior IT Project Management Consultant with various Telcos in Australia and South East Asia (primarily in Malaysia) including an extended role with Optus during its Y2K project. Her consulting roles included working as a Bid Team Manager, responding to RFPs from telecommunications companies in Singapore and Malaysia and as the manager responsible for establishing a Program Management Centre of Excellence within Optus.

Lynda joined Telstra (then Telecom) after graduating from Deakin University, Geelong. She resigned in 1994 from the position of National Manager, Customer Contact Systems to commence her career as a Senior Consultant.

Project Management Power – The Stakeholder Connection
Lynda Bourne

The "project manager" is generally seen as the person responsible for the management of a project and its overall success or failure. However, in many organisations (particularly large complex organisations) the position of the project manager within the overall hierarchy is too low/junior to allow many vital project management decisions to be made based on the project manager's personal authority alone.

The effect of these organisational structures is to require the project manager to garner referred power from more senior stakeholders and colleagues to allow him/her to manage effectively. Whilst on occasions (particularly in emergencies) it may be appropriate for the project manager to seek forgiveness for decisions made rather than permission to undertake certain actions, effective project management requires the considered application of authority to allow decisions to be made and directions issued at the appropriate time.

This paper will build on the need to bring the stakeholder community directly into the project management process identified by Weaver and Bourne in their paper "Project Fact or Fiction – Will the Real Projects Please Stand Up" (PMI Melbourne conference paper, Oct 2002). To report on original research undertaken by Bourne as part of her Doctor of Project Management studies into the distribution of decision making powers within large complex organisations undertaking projects.

The "craft" of project management (ie developing effective WBS, EV Charts, Schedules, etc) will be contrasted with the "art" of project management (ie using the information contained in reports to garner the authority needed to manage effectively). Effective strategies to enable Project Managers to use their "craft" skills to communicate with key stakeholders to obtain appropriate levels of "authority to manage" will be suggested.

Gary Lazarus
Electrical and Information Engineering Department
Sydney University, Australia

Gary Lazarus received his EEC from the Institute of Technology Gore Hill in 1990 and is currently doing his Masters of Engineering at Sydney University, Electrical and Information Engineering School.

He has spent eighteen years working as an engineer and project manager on various digital communications, mainframe integration, and eCommerce application development and deployment projects

His research interest is in Project Management of Engineering and IT projects, with his current focus on virtual teams. Gary Lazarus is a member of PMI.

Open Project Management Methodology for the Management and Control of Virtual Teams

Gary B. Lazarus

Virtual teams are proving to be frustrating to both manage and control. The reality is they are here to stay; therefore a management methodology suite needs to be established to bring such workgroups into the work environment mainstream.

The use of open management where a projects expectations are clearly listed and tracked, and then handed over for management to the team participants, in contrast to the traditional central management of established project management disciplines, is the approach we are investigating.

This research is an articulation of the traditional PM tools and the implementation of an open methodology to enable virtual team self-management. The resulting methodology was tested on a prototype application. The methodology was created from a data set derived from an earlier application primitive. The latest testing is being undertaken with a beta version of the new toolset and the initial results are promising.

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ABSTRACTS OF PRESENTATIONS

Stream 5 : Software Projects
Centenary Room 2, PM Thursday 20-Feb-2003

Terry Wright
eGovernment Policy & Strategy
Multimedia Victoria, Australia

In 1990 **Terry Wright** was one of the founders of the Australian Software Metrics Association (ASMA) (www.asma.org.au) and has since remained on the ASMA Executive. Over that time ASMA has established a global reputation as a thought leading forum for the development of software metrics concepts techniques and tools. Building upon the ASMA work, in 1995 Terry founded the International Software Benchmarking Standards Group (ISBSG) where he is currently President (www.issbsg.org.au). ISBSG is a cooperative body of the peak national software metrics associations of ten of the primary software developing countries. It has set standards, collected project data, analysed this data and has created a public body of knowledge in software engineering processes which is transforming the practices and expectations of developers and business.

Since 1995 Terry has been the Project Director of eGovernment Policy and Strategy for the Victorian Government in the business unit known as Multimedia Victoria. This unit performs the CIO role for the Victorian Government and in that role Terry has developed strategies and policies to enable government to better user Information Technology.

Software Engineering's New Performance Management Capability
Terry Wright

When business needs to acquire custom-built software they lament. Their approach to acquiring their business software does not align with the way they acquire most other engineering products. And there are no guarantees that the exercise will meet any of their success measures. The software engineering scoreboard is dismal with 32% of projects failing to produce anything and average budget blowouts of 87%.

The reasons for this situation are historical and typical of an immature industry. Since its inception in the 1960s the global software engineering industry has neither had a common language nor was it able to reliably and meaningfully measure the output of its processes. This situation began to change with the development of what are now generically known as 'functional size measures' in the early 90s. Based upon the new capability to measure, a number of global repositories of project data were created during the 90s. This has provided a knowledge base to business comparable to those that exist in mature engineering industries such as the building construction industry.

To exploit this new knowledge base in 1996 the Victorian Government developed a new approach for business to acquire the custom-built software which aligns with the way they obtain other engineering products. This approach is known as the southernSCOPE methodology and is in the public domain (www.mmv.vic.gov.au/southernscope). Businesses using the southernSCOPE methodology within the Victorian government and overseas are experiencing a new level of prediction, planning and control when acquiring business applications. Whereas this represents a paradigm shift within the software engineering industry it is merely an adoption of common and often very old approaches used in other industries.

Its existence is driving a shift in the relationships between software developers and businesses…for the better.

Pam Morris
Managing Director
Total Metrics, Australia

Pam Morris is the CEO of *Total Metrics*, an Australian based company that specialises in providing metrics related consulting and training services in South East Asia, Japan and the USA.

Pam has 18 years experience in software development and since 1989 has specialised in the area of software measurement and process improvement. She has provided training courses and metrics consulting services to a wide range of government and corporate organizations worldwide.

Pam is CEO of Total Metrics, an Australian based company that specialises in consulting, training and tools for the implementation of software measurement. She is the president of the Australian Software Metrics Association (ASMA) and holds a position on their Executive and the Function Point Counting and Benchmarking Database Special Interest groups. She represents Standards Australia IT15 committee as the ISO/SC7/WG12 Workgroup Convenor and the international project editor of the ISO standard 14143-1 and 2 for Functional Size Measurement. She plays an active role internationally in the development of measurement standards and was a member of the International Function Point User Group (IFPUG) Counting Practices Committee in the USA from 1993 to 2000. She is an IFPUG Certified Function Point Specialist (CFPS). Pam is a member of the executive committee of the Common Software Measurement International Consortium (COSMIC). She is a regular guest speaker on the topic of software metrics numerous international conferences in the USA, Japan, Korea, South Africa, New Zealand and the UK.

Better Project Tracking and Control using Functional Size Measurement Techniques

Pam Morris

The 1998 Chaos report by the Standish Group found that only 26% of projects could be classified as had completed successfully – that is they finished on time and on budget with required features and functions. A number of Australian organisations are introducing methods that are beginning to challenge these statistics. Their strategy for ensuring their project's success is to quantify the functionality to be delivered by their software project. These ISO standard functional size measures are used to establish accurate resource estimates based on historical data and also contribute to fixed price negotiations of dollars per functional unit delivered. Ongoing project monitoring uses the functional size measures to establish at each stage of development, the proportion of functionality that has been completed compared to that predicted by the effort expended. Project status and scope creep can be tracked quantitatively using an ISO standard method of quantification. The paper presents the concepts behind these methods of quantitative objective estimating techniques and methods for monitoring project status and controlling scope.

David Cleary
Senior Consultant
Charismatek Software Metrics, Australia

Mr David Cleary is a senior consultant with CHARISMATEK Software Metrics in Melbourne Australia. He has worked for over ten years in the areas of *commercial software project development and management*, *software tool research and development*, *tertiary education* and *software measurement*. He has spent considerable time researching in the field of software project management and process. More importantly, this broad based knowledge and understanding of software development techniques is supplemented with real experience in its application to commercial software projects.

Within the software measurement field, Mr Cleary has focused upon the application of functional size measurement to new and evolving technologies, such as *object orientation*, *web based development* and *XML*. He also has a keen interest in the use of software tools to aid the processes of software project estimation and benchmarking. He has presented papers addressing these and other issues to the Australian Conference on Software Measurement (ACOSM) and to the Australian Software Metrics Association's (ASMA) Metrics Forum and the International Function Point Users Group (IFPUG). He is an Australian representative on the board of the International Software Benchmarking Standards Group (ISBSG) and a contributor to its publications *The Project Estimation Workbook* and *The Practical Estimation Toolkit.* Mr Cleary is a Certified Function Point Specialist.

Mr Cleary is actively involved in the ongoing research and development into CHARISMATEK's Function Point WORKBENCH™ - the world's leading tool supporting the Function Point Analysis technique for sizing and evaluating software

Using Software Tools for Effective Software Project Estimation
or "What to Do when The Experts Disagree!"
David Cleary

Over a ten-year period the International Software Benchmarking Standard Group's (ISBSG) software project repository has grown to the size where it now includes data from over sixteen hundred software projects. These projects range across *new developments, enhancements* and *package implementations* in addition to encompassing a full range of project attributes. The combination of the repository's size and, more importantly, the fact that it is an open repository – allowing users to view individual project details – means that the ISBSG's repository is now being used by many individuals and organisations around the world to aid in software benchmarking and estimation.

However, the ISBSG's repository is not unique as a source of software project benchmarking and estimation data. Interestingly, and initially somewhat alarmingly, when a planned project with a particular set of attributes is estimated using a number of the available estimating repositories and tools, including the ISBSG's repository, a wide range of different results are generated!

Instead of assuming that all but one of these results are incorrect, and that the data from which the results are determined are therefore invalid, this presentation proposes that the variation in the results is a consequence of the data underlying each of the repositories and tools having a particular *context*. In order to utilise any repository for effective estimating it is therefore necessary to be properly aware of that repository's *context*. A repository's *context*:

♦ reflects the general nature of the actual projects that are included

♦ defines what is deemed to be an *average* project and

♦ impacts upon the estimates that are generated.

With a focus on the ISBSG repository, this presentation considers what needs to be investigated to properly understand a repository or tool's *context*. It considers:

♦ the type and source of software projects that are typically contributed to the repository

♦ who are the users who can most benefit from using the repository and

♦ how the repository's estimates should be interpreted with respect to a planned project or whether, for that project, the tools is relevant at all!

The presentation aims therefore to provide users of software project repositories and tools with a level of understanding of how to assess the repository or tool's *context* to help ensure that it can continue to be utilised to provide effective, useful and accurate software project benchmarks and estimates.

Evelyn V Richardson
Systems Engineering Doctorate Student
University of South Australia, Australia

Ms. Evelyn V. Richardson, CSTE, CSQE has experience in requirements engineering, information systems, database programming and system maintenance. Evelyn is QAI certified in Software Test and Evaluation Engineering and ASQ certified in Software Quality Engineering. She holds a Masters Degree in Computer Systems Management from the University of Maryland University College and is pursuing a Ph.D. in Systems Engineering from the University of South Australia. Ms. Richardson is a member of the Institute of Electrical and Electronics Engineers (IEEE), the American Society for Quality (ASQ), the International Council on Systems Engineering (INCOSE) and the Quality Assurance Institute (QAI).

Technical Performance Metrics in Software Intensive Projects
Evelyn Richardson

Techniques: Software Project Management, Metrics and Models, Strategic Planning

Configuration management of software items is a traceabilty tool to identify and control development during the project lifecycle. Status accounting of a software configuration item (SCI) facilitates a corporate memory of project events and serves as an experience bank for future releases. In concurrent release development, where disparity in an SCI promotes version conflict, performance metrics within the management system fit together for a more coherent strategic planning practice.

Stakeholders, both internal and external to the enterprise, are cognizant of the necessity of these metrics and the impact of remaining competitive. The use of technical performance metrics for concurrent software development enlists these stakeholders to take a varied approach to prioritising SCIs. Understanding the concurrent development of software intensive performance SCIs requires an examination of metrics that are:

- applicable to multi-levelled releases
- reflect a functionality to future releases, and
- denote the improvement of changes to the retiring application.

Estimation and measuring SCIs based on initial intangibles is a difficult task for a dynamic infrastructure.   The eight steps to incorporate performance metrics to reflect the software development of these SCIs in the lifecycle will be presented.

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ABSTRACTS OF PRESENTATIONS

Stream 6 : Earned Value Management
Federation Ballroom North, PM Thursday 20-Feb-2003

Joint Presentation - James Thompson & David Read

James Thomson
Project Manager
Standards Australia International, Australia

James is a Projects Manager with Standards Australia International in the Management and Business group. He currently is managing projects in corporate governance, market research, knowledge management and personal financial planning.

James graduated with a Bachelor of Engineering (Electrical) from Newcastle University in 1987 and commenced work in the coal industry in the Hunter region. From there he took a position with a multi-disciplined consultancy based in the Illawarra. He was promoted to manager, a position he held for a period of five (5) years. James has experience in information management, facilitated training, finance, administration and engineering.

James is a member of the Institution of Engineers Australia, Australian Professional Engineers Scientists and Managers Association (APESMA), he is a qualified workplace trainer, has a post graduate Certificate in Management and is currently studying for masters in Business Administration (Deakin University) and Professional Accounting (University of Southern Queensland).

David Read
Director
Earned Value Systems Pty Ltd, Australia

David Read is the Director of Earned Value Systems Pty Ltd (EVS), a project management consulting company specialising in Earned Value Management training and assisting customers and contractors to implement management systems.

David has been involved in project management for 30 years. He has specialised in Earned Value since playing a key role in its introduction in Australian Defence acquisition projects when he was Director of Project Management Systems in the Department of Defence during the period 1988 to 1993.

As a project management consultant since 1993, David has assisted most of the major companies in the Defence industry in Australia. He has also undertaken engagements in the USA, Italy and UK.

Building a National Standard
David Read & James Thomson

A committee was convened by Standards Australia International (SAI) in February 2000 to draft a National Standard for Earned Value Management. In February 2002, after two years work, a draft Standard was ready for promulgation for public comment. Promulgation occurred in early 2002 and the draft standard was presented at the Sixth Australian International Earned Value Performance Management Symposium in February last year.

This presentation will address the processes involved in the subsequent refinement of the Standard, incorporation of public comment and consequent editing and revisions. The standard is expected to be published before the 2003 Symposium is convened.

Mr James Thomson (SAI) will address the Standards Methodology and talk about possible further lines of development.

David Read will present a summary of the principal issues in the document. He will also identify the principal differences in philosophy and formal requirements between the new Australian Standard and the US equivalent (ANS/EIA-748:Earned Value Management Systems) and the existing Australian Defence Guidance Document (DEFAUST 5657: Australian Cost/Schedule Control Systems Criteria Implementation Guide).

Shane Huby
Acting Program Manager – Earned Value Management
Defence Materiel Organisation
Department of Defence, Australia

Shane Huby has been involved with the management of a number of major Defence capital acquisition projects since 1994. The majority of these projects have had contractors who utilised Earned Value Management Systems in place as a measurement tool for management. Since August 2002, he has been fulfilling the role of the DMO's Program Manager – EVM. This position is responsible for the development and implementation of EVM policy for Defence's primary acquisition organization. He has post graduate qualifications in strategic level procurement and management, and is a member of the Australian Performance Management Association.

EV Directions at DMO
Shane Huby

The presentation will discuss the challenges that lie ahead for the Defence Materiel Organisation and its use of EVM. Included will be the latest on the DMO EVM reform initiatives including the rewrite of the existing DEF (AUST) EVM Standards, the internal application of EVM principles via the Improved Project Schedule Status Reporting Project, and initiatives being implemented to improve the way EVM is implemented and used on software projects.

Geoff Roberts
Senior Consultant
Primavera Systems Inc., UK

Geoff Roberts has more the 23 years of experience in all aspects of project management controls, system implementation and integration. He has applied his strong analytical abilities and excellent communications skills working to assist in the delivery of major projects for a number of clients and contracting organizations in diverse industries, including construction and engineering, environmental controls and utilities. As a Senior Consultant for Primavera Systems, Geoff provides product training, mentoring, and implementation consulting to a variety of companies.

Primavera Experience
Geoff is an integral part of the Implementation consulting team striving to deliver successful Primavera solutions to Clients throughout the world.

Additional Employment History
Before joining Primavera Systems, Geoff was a Project Controls Manager, for Montgomery Watson dealing with the implementation, development and management of the Integrated Project management system which comprised P3e and Expedition, integrated with an ERP and Client systems.

Prior to this Geoff was a Project Controls Manager for Bechtel again implementing, developing and integrating a bespoke cost system with P3 and an ERP and Client systems.   Within both organizations Geoff managed a large team of controls staff to assist the business in the delivery of major programs of work.

Prior to this Geoff worked within a large utility company to improve their understanding of Earned value techniques and how these would benefit the company of their major programs of work.

Early in his career Geoff acted as a Cost Engineer on a variety of Projects dealing with all cost related activities.

Education
Geoff received a B.S. in Quantity Surveying from the University of Cardiff, UK and is also a Chartered Surveyor (MRICS) and Member of the Association of Cost Engineering (MACostE).

Implementing Simplified Earned Value within Primavera Enterprise
…the "requirements" & the "rewards"
Geoff Roberts
(incorporating material by Quentin Fleming)

This Presentation will discuss the origins of Earned Value as a performance management system, and how it benefits Project management. It will also discuss how Primavera Enterprise can be readily incorporated as an integrated EV management system.

The presentation will provide a brief history of EV and how it was developed in the late 19th century by Industrial engineers. These original thoughts where not further developed and it was not until 1965 that the US Airforce put together C/SCSC to enable them to successfully manage the performance of the Minuteman Missile project. This has since been refined to today's Earned Value Management System (EVMS)

The presentation will then move through a quick tutorial on Earned Value, outlining the PV, EV and AC before the main topic for discussion i.e. how a Simplified EVMS can benefit all projects

Simplified EVMS will be covered in two parts firstly the 'Requirements' that have to adopted on the project to enable performance measurement to be undertaken, and secondly the 'Results' that can be obtained and the conclusion that can be developed from the measurements undertaken.
The' Requirements' of a Simplified EVMS outline how taking just 10 of the original 32 performance criteria is not only relatively simple on all projects but can lead to significant results
The 'Results' can clearly demonstrate that the forecast data developed from the measurements adopted, can significantly add to the management of all projects on which EVMS is established

Utilizing Primavera Enterprise as the integrated management system allows easy data entry providing detailed forecast data using the EVM principles outlined above

Joint Presentation - Luis Contreras & Oscar Banda Alfaro

Luis Contreras
Senior Consultant
AzTech International, USA

A Principal Consultant with AzTech International, a US-based project management consulting firm, Mr. Contreras has been a recognized PM expert since 1989. He provides consulting services and training to companies with critical projects. His areas of expertise include PM, Earned Value Management Systems (EVMS), and Enterprise Resource Planning (ERP) systems. He assists clients with all facets of PM–from the proposal stage through completion. Mr. Contreras has designed and implemented a number of widely used custom applications. He has also helped companies implement systems using off-the-shelf PM software including Artemis Views, Primavera, Open Plan/Cobra, Micro-Frame Project Manager, and SAP. He has supported clients throughout the US, Canada, England, and Australia.

Mr. Contreras is currently the lead EVMS consultant for the Naval Air Systems Command (NAVAIR) EVMS implementation. This SAP implementation will serve 33,000 users throughout the US. Other recent successes include lead consultant for Pratt & Whitney's successful Integrated Baseline Review (IBR) on the Joint Strike Fighter program and Rolls-Royce Defence Europe's EVMS Accreditation (the first company to do so using SAP). Rolls-Royce's Initial Compliance Review was conducted by the US DoD (aided by the UK MoD). The review included representatives from General Electric, Pratt & Whitney, and the Canadian Maritime Helicopter Project (MHP).

Mr. Contreras has worked with contractors in various industries, with an emphasis on aerospace and defence. He has supported contractors working with diverse agencies, including the US DoD(Army, Navy, Air Force), DoE, NASA, UK Ministry of Defence, and the Australian Department of Defence. Clients have included Rolls-Royce (Defence Europe & North America), Pratt & Whitney, General Motors, AlliedSignal, Electronic Data Systems (EDS), Pioneer Electronics, Lennar Home Builders, GEC-Marconi, E-Systems, Lockheed Martin, and the Chicago Housing Authority, among others.

Mr. Contreras has a degree in Economics from UCLA. He is also a Lotus Notes Certified Consultant and a Project Management Institute (PMI) member and worked with the team writing the new PMI EVM Standard.

Oscar Banda Alfaro, MSc
Senior Consultant
AzTech International, USA

A Senior Consultant with AzTech International, a US-based project management consulting firm, Mr. Banda has been providing consulting services since 1993. His areas of expertise include Environmental Management, Industrial Hygiene, Project Management, Earned Value Management Systems (EVMS), and Enterprise Resource Planning (ERP) systems.

Mr. Banda has worked with SAP, MS Project, and Artemis. He has supported clients throughout the US and in England.

Recent successes include overseeing design and implementation of EVMS System Description & Instructions as well as training materials for both Naval Air Systems Command (NAVAIR) and Rolls-Royce Defense Europe. He also participated in the EVMS Reviews that resulted in a US DoD Accreditation (the first company to do so using SAP).

Mr. Banda has a BA in Environmental Analysis & Design with a minor in Urban & Regional Planning from the University of California Irvine (UCI) and an MSc in International Business from Reading University in the UK. He is also a Project Management Institute (PMI) member.

Strategic Earned Value for Senior Management
Oscar Banda & Luis C Contreras

Using Earned Value can be a strategic maneuver to gain competitive advantage, but creating or using Earned Value is often seen as complex and unwieldy. And rightly so. This presentation discusses a simplified approach to using Earned Value that Senior Management can apply without investing in a complex system.

We all know that modern business entails developing strategic alliances, partnerships, and teaming agreements to help deliver goods or services faster, cheaper, and more profitably. But, these teams are fraught with corporate and cultural issues that make projects challenging and risky if they are not managed with objective, measurable results.

To achieve these results, we discuss some simple, "low tech" ways to use Earned Value concepts to increase performance, improve communication, and make geographically and culturally diverse teams more successful. Our solution borrows from Earned Value, Integrated Master Plan/Integrated Master Schedule, and other management techniques without introducing arcane acronyms and terms. Though Earned Value is a proven approach for controlling work, performance, schedule, costs, and risks, we strive to address culture, values, communication, commitment and many other soft issues. The approach we describe will help you objectively organize, authorize, plan, and monitor projects. Our model attempts to bring Earned Value management to the real world and out of the hands of the theory and rhetoric that often surrounds these systems.

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ABSTRACTS OF PRESENTATIONS

Stream 7 : Project Management
Federation Ballroom South, AM Friday 21-Feb-2003

Ron Sulman
Director
Rawlings Sulman Pty Ltd, Australia

Ron Sulman is a director of the management consultancy Rawlings Sulman Pty. Ltd. which he established in 1987 with Dr. Barry Rawlings. The consultancy specialised in the fields of management of research and development programs and management of advanced technology projects. The company is based in Melbourne, Australia.

Over a thirty year career Ron has had extensive experience in the management of advanced technology projects in the defence, aerospace, IT, and telecommunications industries and as a consultant has clients in the both Government and private industry both in Australia and in Europe. Throughout his career, he has been able to observe, first-hand, both change and continuity in the problems facing the managers of complex, high risk projects. In recent years he has worked extensively with Telstra Corporation and other public companies in the bidding, managing and directing of development projects, as well as conducting training and reviews.

Ron, is a Fellow of the Institution of Engineers, Australia, and is a qualified submariner. He joined the Navy in 1963 and received his professional training in Australia, U.K. and the U.S.A., including a number of years in Australian and overseas shipyards undertaking the construction and modernisation of ships and submarines. He is currently preparing an advanced project management unit for a Master of Technology (Project Management), a professional Masters degree to be offered by APESMA / La Trobe University

Return on project investment and reducing total cost of ownership – New demands for performance management.
Ron Sulman

Traditionally, performance management techniques were developed for application in advanced technology, thus high-risk, projects common in areas such as defence, aerospace, and research & development. These projects delivered a defined product to a defined customer separate from the project organisation.

In general, in these projects the combination of performance management and systems engineering techniques combined with disciplined, controlled teams, enabled standard project parameters: scope, budget, schedule and performance, to be defined and delivered to.

Today, because of the now almost complete interrelationship between business process and function and technology, internal projects for complex, enterprise-wide (and global) information technology systems are intrinsic to all industry sectors. 'E-business' is now the established business model regardless of whether that industry sector is, for example, brewing, mining, banking, or retailing. Thus internal, high-risk, projects are now found in all industry sectors. In general, in these projects the standard project parameters are very difficult to define, and often not defined. In addition, the projects have other problems:

–   lack of true project accounting,
–   difficulty of defining system, hence scope, boundaries
–   differing emphasis on success parameters,
–   lack of understanding of the systemic requirements for effective project management,
–   instability, from a project management point of view, of the management operating environment which, in turn, is caused by the very competitive and fast-moving business environment.

This last source – the fast moving business environment - generates additional sources of difficulty:

–   a believe in the necessity of 'first-to-market' which generates unsustainable expectations in project cost, schedule and product quality;
–   the pervasiveness of hype which suggests that there is a technological solution to every business problem, which leads to unachievable expectations and a lack of the holistic reasoning which is needed for business transformations; and

The result has been that many of these projects have failed. For example, more than half of all Customer Relationship Management initiatives have failed to produce the anticipated results. Consequently, in this 'post-dot-com-meltdown' world, the focus is on determining the return on investment from these projects prior to approval, and on reducing the total cost of ownership. However, these things are very difficult to determine, and achieve, without a very advanced understanding of project management and performance measurement.

This presentation will seek to look at the challenges that the performance management industry faces in adapting to this non-traditional environment, and the ways that it can save the 'new world' re-inventing the (performance management) wheel.

Joe Kusick
Senior Manager, Program Independent Assessments
Raytheon Company Space & Airborne Systems, USA

Joe Kusick is the senior manager of Program Independent Assessments for the SAS business of Raytheon Earned Value Management Council.

In relation to earned value, Kusick provides staff recommendations for the implementation and use of earned value for government, internal development and other selected programs to the corporate EVMS Executive Council consisting of the chairman and vice president of the Raytheon Program Management Council, executive vice president of engineering, chief financial officer of Raytheon, and the director of Integrated Product Development Systems.

He is active on the Program Management Systems Subcommittee of the National Defense Industry Association, which evolved the Industry Earned Value Management Standard and provided guidance and input to the current Earned Value Management Guide.

Kusick has approximately 26 years experience in the commercial and government environment. His career began in 1976 as a contract administrator at Navalex, Vallejo, Calif. From 1979 to 1981, he served in a variety of Production Control and Manufacturing Program Management positions at Raytheon Electronic Systems Division.

From 1982 through 1985 he held various management positions in Business Management and Industrial Engineering at Northrup Electronics Division Company. During this tenure at Northrop, he was a key management team member for the Tri-Service CS2 Validations for Research and Development and Production Programs for the Northrup Electronics Division. His management capacities included representing Northrop Electronics as their CS2 focal point and serving as the business manager for the Peacekeeper, SR71, B2 Guidance, Avionics and Turbine engine monitoring programs.

In 1995, Kusick led the management team in developing the Earned Value Management System policies and procedures for Raytheon Aircraft's implementation of Earned Value Management on the JPATS program. He was one of the members of the Raytheon Aircraft management team who received the Aeronautical Systems Center/Air Force Association Team (ASC/AFA) award in 1996 for commitment, teamwork and innovations. Kusick was nominated in 1997 for Vice President Al Gore's Hammer Award. In 1998, Kusick was a key member of the Integrated Program Management Initiative industry and government team, which received the David Packard Award. This is the highest civilian honor from the Department of Defense.

From November 1998 until April 2000, Kusick was the senior business manager responsible for New Product Development Programs at Raytheon Aircraft Company. He provided strategic and operational business analysis to the executive leadership team at Raytheon Aircraft. He reported to the Vice President of Business Management.

Kusick earned his master's degree in business administration from California Polytechnic State University, San Luis Obispo, 1981. He taught upper division finance courses at this university from 1979 through 1981 and is a member of their permanent part-time staff.

Kusick is active at the bequest of the Air Force, Navy, DCMA and other national organizations in lecturing on the use of earned value as a best practice.

He, his wife, Cyndi and three daughters live in Los Osos, California.

Program Independent Assessments and their Integration with the Earned Value Management Process

Joe Kusick

The discussion will center on the Program Independent Assessment process and how coupled with the EVMS management tool, Program Managers can better assist their program execution team in performing and exceeding contract requirements.

EVMS will allow the program manager to focus on the issues at hand, and the Program Independent Assessment Process will allow us to develop solution sets and obtain buy in to the closer plans by both the customer and the contractor team members.

Consolidated findings from a sample of programs will be presented and the conclusions will be self evident.

The use of closure planning, risk and opportunity analysis and the use of risk management tools will also be discussed.

Martin Vaughan
Director
Terra Firma Pty Ltd, Australia

Professional Summary

Qualifications	Bachelor of Engineering (Civil) – Monash University
	Diploma of Education (TAFE) – Melbourne University
Professional Affiliations	Member of the Australian Institute of Project Management (AIPM)
	Member of the Project Management Institute (PMI)
	Member of the Australian Performance Measurement Association (APMA)
Experience Summary	Martin Vaughan is the director and partner of Terra Firma Pty Ltd, an Australian professional services firm employing 45 persons, specialising in Project Management including Earned Value Management. He is on the National Executive Committee of the Australian Performance Management Association (AustPMA).
	Martin has helped establish and build a thriving Project Management organisation which is well regarded by its clients in Australia. In his role at Terra Firma he has also established the delivery methodology, training strategy and put in place the processes and controls for quality service delivery.
	Prior to this he project managed a number of web based Product Development projects, developed product and project management methodologies as well as presented Project Management, EVM and Planning training courses in both the public and private sector. Martin had previously held a number of Defence Project Controls roles earlier in his career specialising in planning. He originally came from an engineering and construction background.
	Contact Martin on mvaughan@terrafirma.com.au

"Information Overload"
Martin Vaughan, Terra Firma

Information Overload is a reality of this day and age. We sit with our friends and colleagues and lament the amount of emails, phone calls and meetings we have. We try to work more and more hours to get through everything. We feel guilty at not having reviewed a critical document, or looked at an interesting site our colleague recommended. We lament never having the time to really analyse something in depth or have the time to reflect and ponder. We always seem to be in "bushfire mode"

Did you know that recent Gartner research indicates 90% of businesses believe they suffer from information overload and that their competitiveness is negatively impacted as a result. Further Gartner estimates that businesses across the globe will spend as much as $30 billion US on information management systems this year. According to Gartner, workers polled by them spent on average 30 to 35% more time working with Email than they did a year ago. Gartner predicts Email volume for businesses will grow 40% per year with some industry forecasts that by 2005 world email volume will reach 9 trillion. Of this volume, predictions of the volume of spam range anywhere from 10 to 59%.

If we accept the fact that being overloaded isn't an isolated occurrence, what is the cumulative affect of this phenomenon is on your group, business unit, company ? Consider the vast technical improvements over the last 10 years, have they really made us more effective ? Finally consider the techniques, processes and technology presented by other speakers and vendors at this conference. How does one ensure that any changes to the organisation's approach to Project Management and Performance Management will actually improve efficiency and knowledge ??

So consider "Knowledge Management" rather than "Information Management" and consider whether or not an initiative contributes to or lessens the "Information Overload" of your colleagues. Consider Information Overload Avoidance criteria including questions as to whether the potential solution will:

- ➢ provide individuals with information they actually need ?
- ➢ promote interpretation, analysis and reflection ?
- ➢ add to day to day communications, particularly Email volume ?
- ➢ actually save individuals time ?
- ➢ improve the organisations Knowledge Management ?
- ➢ make the organisation more efficient ?

Sean Kelly
Director
CRM Business Solutions, Australia

Sean has had many years varied experience in management and consulting and has worked overseas and extensively throughout Australia. Currently a Director of CRM, he has previously worked for KPMG Peat Marwick, Giltnet Ltd, Thomas International, John P Young & Associates, Drake International, The Peters Group of Companies and the Dairyboard in management and consulting capacities.

Sean has been the driving force in developing the Focus Performance Management Process & Program to assist companies drive their corporate strategy and develop staff performances. He has worked across a broad range of industry in a consulting capacity and has primarily been involved in Performance Management, Organisational change, and Management team analysis, Executive Search and Recruitment and in Management development.

Sean has initiated and implemented some innovative Management change and development programs and is very highly regarded in the field of behavioural analysis and its practical applications and implications upon selection, bench marking, organisational culture, management effectiveness, management development and peoples responsiveness to change. Sean has had over fifteen years experience in Management Consulting and Executive Recruitment with a primary focus on Professional Services, Manufacturing, Finance and Marketing.

Through his achievements and wide ranging experience in consulting, Sean has been invited to address MBA and Post Graduate students and written articles which have been published in professional journals and newspapers.

Managing Expectations – Managing Performance
Sean Kelly

Cascading strategy through an organisation and achieving timely responses to external environmental changes have been some of the biggest challenges facing business on an ongoing basis. Coupled with a commonly held mechanistic view of organisations and internal filtering processes, organisations are not viewed as dynamic, adaptive systems and largely rely on stringent systems to 'manage' and channel information without tapping into the huge pools of Intellectual Capital from within. Responses to external stimuli tend to be reactive rather then proactive and are mostly handled on a hierarchical basis with diminishing affect.

This presentation overviews some findings from many years consulting to varying types of organisations and how we need to rethink our approach to leading our people and responding to change. We need to see Performance Management philosophy and processes as a positive means of enabling us to be more responsive with the capacity to adapt as needed.

Large, inflexible computer systems and prescriptive procedures are not the answer.

We need to understand and re-learn about people's need to belong. We need to understand the impact of behaviour and attitude and accountability. We need to value people and do a lot more asking and listening. We need to give people more responsibility, authority and trust.

Effective Performance Management is a practical process designed to provide real time indicators of performance by monitoring actual outputs against targeted Strategy / Goals / Objectives / Benchmarks / Standards. It provides a flexibility capability which allows for quick response time far removed from the hard financial data on which many organisations base their decisions. It should be viewed as a proactive feedback mechanism to enable timely intervention and feedback.

The presentation will briefly overview, and demonstrate, the new Focus PM © internet based performance management process which links Strategy; Values, Mission and Purpose; Key Result Areas, Key Performance Indicators; Activities, Job Descriptions, Employee details, Operational Projects and Performance Appraisal.

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ABSTRACTS OF PRESENTATIONS

Stream 8A : Prince2
Centenary Room 2, AM Friday 21-Feb-2003

Ian McDermott
Director
Tanner James Management Consultants, Australia

Ian has assisted many organisations throughout Asia Pacific in both improving their application of project management and in making the transition to advanced systems and software engineering technologies, especially CASE and Process Management. He is experienced in providing training, consulting and mentoring in the areas of Project Management, Programme Management, Process Management and Client/Server Development.

Over the past five years as Director and Principle Consultant with Tanner James Management Consultants, Mr. McDermott has been responsible for leading the implementation of the PRINCE2 Project Management Method within many Tanner James key clients including the Defence Materiel Organisation (DMO), NRMA Insurance, IP Australia and the Department of Transport and Regional Services to name just a few.

Prior to joining Tanner James Management Consultants, Ian was Business Director for LBMS Asia Pacific. Ian was responsible for running Consultancy Operations in Melbourne, Brisbane and Hong Kong and for the set-up of a distributor network for LBMS methods and tools within Singapore, Malaysia, Thailand, Philippines and Korea. As part of this role, Ian spent much of his time assisting organisations in the evaluation and implementation of methods including Project Management, Strategic Planning and Systems Development. Major organisations which Ian assisted included, Electricity Generating Authority of Thailand, Revenue Department Thailand, Siam Commercial Bank, Mass Transit Railways (MTRC), Kowloon and China Railway Corporation (KCRC), China Light and Power, Hong Kong Government, Citibank and Hewlett Packard Singapore.

Ian is an accredited PRINCE 2 Trainer and Consultant and holds a Bachelor of Science degree in Information Systems Design (Honours) from Kingston University, England.

Making PRINCE2 Work Within Your Organisation
Ian McDermott

PRINCE2, PRojects IN Controlled Environments version 2, is a public domain project management method covering the organisation, management and control of projects. Since the release of the first version in 1989, PRINCE has become widely used in both the public and private sectors and is now the UK's de facto standard for project management with rapid adoption within Australia, Europe and the US.

PRINCE2 is designed to be applied to any type of project irrespective of size and complexity. The key to successful implementation of the method is to vary the formality of application to suit the project. This presentation will run through the steps involved in managing a project using the PRINCE2 method, but in doing so will discuss how its application can be varied for a small versus a large project. The Tanner James web-enabled PRINCEPlus™ toolset will be used to demonstrate how the method can be tailored for pragmatic use within your organisation.

Ray Broadbent
Project and Programme Management Office Advisor
CrimTrac Agency Programme Office, Australia

Ray was commissioned into the Royal Australian Airforce in 1973 and was, at the time the youngest commissioned officer in the service. He started his career as an Air Traffic Controller and quickly progressed to becoming an on the job training officer for other Air Traffic Controllers, developing and implementing training packages and courses. He also lectured and consulted in man management to Air Traffic Control executives as well as facilitating many courses in personal and professional development. Ray was also instrumental in achieving International Civil Aviation Organisation (ICAO) recognition and accreditation for the Air Traffic Controllers in the RAAF, the first military organization to be accredited by ICAO in the world.

In 1991 Ray moved to Canberra to join Headquarters Australian Defence Force as an Information Systems Strategic Planner and Disaster Recovery Planner. In this position he was involved in the development of the strategic direction for Information systems within the Department of Defence and held responsibility for the continuing provision of services for all the Department's mainframe computers during a disaster. In conjunction with the Defence Security Branch, he provided regular lectures in Information Technology Security. He latter joined the Australian Public Service where he became the Programme Manager for more than 20 RAAF Restructuring Projects. During the period, he jointly developed the RAAF Standard Project Management Method (SPMM). This led to his next position in 1995 when he started teaching and consulting in PRINCE. He provided PRINCE consulting and training to members of the RAAF, Royal Australian Navy, Royal Australian Army and civilians. On a major consulting assignment to Logistics Command, he trained more than 100 staff of the Directorate of Logistics Development in project management and assisted them in the introduction of PRINCE.

In 1997 Ray moved to the Defence Acquisition Organisation as a consultant in PRINCE2 and also held responsibility for the introduction of PRINCE 2 into the Defence Acquisition Organisation. In 1998 Ray joined Technology Australasia as a Senior Consultant and principle trainer in PRINCE2 where he provided training and consultancy support services to both private and public institutions. He moved to Tanner James Management Consultants in 1999 to become their Principle Public Trainer in PRINCE2. While at Tanner James Ray became one of Australia's most prolific trainers of PRINCE2. He assisted with consultancy services to many of Tanner James clients and was involved in the development of many of Tanner James consulting and training products. Ray also taught the fundamentals of project management on behalf of the University of Canberra for their Professional Development Program.

Ray rejoined the Australian Public Service in August of 2002 to become the CrimTrac Agency Project and Programme Management Office Advisor.

Adapting Prince 2 to a Software Intensive Development Programme
Ray Broadbent

On 17 November 1998, the Australasian Police Ministers Council (APMC) met in New Zealand and resolved to support the Commonwealth's proposal to provide a central infrastructure for national law enforcement systems.

The CrimTrac Agency was established on 1 July 2000. It was mandated to supply the following services:

A new enhanced National Automated Fingerprint Identification System (NAFIS);
A new national DNA system, an investigative tool for police;
A national Child Sex Offender system, for police use only;
Fast access to shared operational information including domestic violence orders, person warnings and stolen vehicles;

Australian police services have a long established commitment to the exchange of national policing information. Since 1990 the National Exchange of Police Information (NEPI) had developed a national network linking Australia's police services for the purpose of solving crime and sharing information, previously unavailable or too time consuming to access in all but the most violent of crimes. The establishment of the CrimTrac Agency is designed to build on the NEPI initiative by capitalising on advances in technology. On 30 June 2000 NEPI ceased operations.

Since the establishment of CrimTrac several external and internal programmes have evolved. The external programmes relate to services and products supplied by Crimtrac to the individual police jurisdictions. Internal Programmes were also established to govern internal processes, procedures and policies.

A project methodology began to evolve within the agency with the focal point being the Project Coordinating Committee, however it was inadequate for the escalating nature of the projects that were being carried out. A Projects Management Officer (PMO) was recruited with the initial task to create a sound project management methodology to carry CrimTrac well into the future.

Following extensive research, a comprehensive, sound methodology was selected. This methodology was PRINCE 2. The PMO adapted many of the processes within PRINCE2 to better suit CrimTrac needs resulting in its own methodology titled the Corporate Programme and Project Management Framework.

Kenn Dolan
Director
Ferguson Project Management Services Pty Ltd (FPMS), Australia

Kenn personifies the FPMS philosophy of commitment, professionalism and adaptability by providing quality solutions that meet and exceed the needs of our diverse client base. The FPMS approach to Project Management delivers world-class systems to provide competitive advantage for contractors, accountability for clients and consistency for all.

Kenn, as director of FPMS, has been influential in increasing awareness of PRINCE2 in Australia and providing Project Management support to develop highly productive and successful teams for clients such as Department of Defence, Government Agencies and Commercial Organisations in Australia and South East Asia.

Kenn Dolan and Jo Adams (Director, FPMS) developed the PRINCE Coach^{TM} Programme to guide and support organisations and teams during the implementation of PRINCE2 within the project environment. The programme is designed to maximise the benefits of the adoption of the methodology and introduce the change with minimum disruption to the organisation, projects and personnel. The PRINCE Coach^{TM} Programme is a flexible and unique approach to allow the collaborative establishment of the project environment and provides experience and leadership to all levels of the team as the new culture is introduced. As a result of using this approach, increases in project success of 40% have been recorded. DSTO, DAIS and SA Water are among the clients benefiting from this programme.

Kenn holds a BEng (Hons) degree in Civil Engineering from Imperial College, London. He gained extensive experience throughout the United Kingdom with such clients as European Development Fund, Ministry of Defence and Department of the Environment before taking up a key role on the Project Management Team for the prestigious European Commission Headquarters Development in Luxembourg. On successful completion of this project, Kenn was assigned to the key management role for the completion of a problematic infrastructure project in Mozambique. Through Kenn's expert guidance the project was successfully completed 15% ahead of schedule. It was as the Programme Manager for Research and Development at National Engineering Laboratories that he introduced PRINCE2 as the methodology for managing projects.

Kenn established FPMS to focus on the delivery and support of projects using the PRINCE2 Project Management Methodology. Having the unique and powerful combination of a background in Performance Measurement, Productivity and PRINCE2, Kenn has provided expert guidance, to a large number of high profile projects and organisations by implementing strategies, to secure increases in productivity of 35% and increase in profit of over 300%.

Managing the Unmanageable – The Application of PRINCE2 by Case Study
Kenn Dolan

Projects are unique in nature and therefore fraught with risk and uncertainty. It is curious that this property, which distinguishes projects from other work, is also a prime reason for not applying adequate project management techniques. All the more reason to resource the management of projects appropriately and apply best practice to the development and implementation of all projects.

The more uncertain the environment, the fewer restrictions and controls people like to have imposed upon them. This is one of the most common comments from project teams in experimental and development environments – where the presence of controls is seen to inhibit the learning and development processes. What is important in this environment, is the sensitive application of a control methodology and a separation of the management and technical controls.

By way of the examination of case-study situations, this presentation will discuss how the PRINCE2 Project Management Methodology can be applied successfully to the most sensitive environments. The paper will expose how the methodology can be adapted to ensure that the pivotal members of the project management team retain management control but allow the technical specialists the freedom to be creative and expressive in a research and development environment.

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ABSTRACTS OF PRESENTATIONS

Stream 8B : Performance Issues
Centenary Room 2, AM Friday 21-Feb-2003

Tony Carter
Principal and Director
Tallowillow Enterprises Pty Ltd, Australia

Tony Carter spent his formative years as an engineer officer with the Royal Australian Navy.

As Principal and Director of Tallowillow since 1986, he specialised in project performance management, systems engineering, reliability, strategic maintenance management and development and implementation of operations support systems, working with clients such as TNT, AWA, EDI, BHP, Defence, ADI, Optus, Boeing, CelsiusTech and many others.

Tallowillow focuses on durable, flexible and continuous sustainable growth in system performance and corporate capability maturity.

Many of the techniques now applied to business management have been developed from the systems engineering and project performance management disciplines, and from leadership development programs in voluntary organisations.

Innovative Interaction – Simply The Best in Adaptable Performance
Tony Carter

Although most of us would like to manage systematically, with detailed planning for long term outcomes, continuous evaluation, and tangible interdependence between people and processes, we are increasingly unable to do so, despite the many tools and techniques available to us.

Increasing specialisation in functions and roles has increased the interdependence and reduced the communication between them, both at the micro and macro levels in organisations and societies. An elemental failure, change in performance, or violation of relationship can and does ripple through the whole system. Systemic, and collateral damage to the organisation's goals compounds over the time that the failure is tolerated or remains unrecognised.

We seem to be caught on the horns of a dilemma. Rigid processes and systems that are applied to achieving the "six sigma" or "balanced scorecard" outcomes can be a liability in an environment of continuous change, and are subject to "discontinuous reinvention" at process and corporate levels at increasing frequencies. Flexible specialisation and reconfigurable systems on the other hand, continuously introduce errors, are difficult to manage, destroy relationships and loyalty, reduce predictability and constrain growth.

Fortunately, there is a long term solution. Innovative Interaction describes the highest level of Capability Maturity. It doesn't matter what business you are involved in – project management, scientific research, manufacturing, defence, or the Church, the same principles and practices apply to achieving and sustaining continuous improvement and growth in Capability Maturity.

Unfortunately, there is no "instant pudding" – you can't import other people's systems and experience and expect them to work for you. It's a journey the people in an organisation have to take together. To get there you will need to be a disciplined learning organisation, with a heavy commitment to a culture of constructive behaviours and an approach that can be uniformly and systematically applied to realistic situations to give meaningful results.

Such an approach to deliberate capability maturity growth, will be presented as a foundation for adaptable performance in an environment of continuous change.

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ABSTRACTS OF PRESENTATIONS

Stream 9A : Risk Management
Federation Ballroom North, AM Friday 21-Feb-2003

Kevin Nevrous
Partner
Deloitte Touche Tohmatsu, Australia

Kevin Nevrous is a partner in the Enterprise Risk Services Group of Deloitte Touche Tohmatsu in Melbourne, Australia. He has been involved with Risk Management and Project Quality Assurance services since 1988. During this time Kevin has assisted clients in North America with project implementation, focusing on quality assurance services and he currently has clients both in Australia and across Asia which he assists with risk management, including security management and project quality assurance.

Over his career, Kevin has worked extensively in a wide range of industries, starting in financial services and manufacturing. Most recently he has worked with clients in the utilities and government sector, but with a particular focus on telecommunications and technology organisations.

Project Risk Management
Kevin Nevrous

The application of AS4360 in the project environment has predominantly focused solely on the core activity of the project and was decreed a Project Management / Project Office responsibility.

Such a narrow focus ignored the necessary links to the overall strategic risk environment of the organisation, its stakeholder and steering committees. It also tendered to overlook the relevance of issues being managed at the implementation level when evaluating and strategising mitigation activities.

As the nature of projects being undertaken grow in complexity with far reaching change management issues, this focus is starting to shift. Project Risk Management models which require greater input and attention from all levels of the project team, and which consider risk management from the inception of the project, are proving more effective.

These models still rely on the principles of AS4360, but recognise the need to link the core project management risks with the risks and issues operating at the Strategic and Implementation level. Understanding that all three are interrelated and that any project creates risk to an organisation outside the immediate sphere of the project office and team. In particular these models require commitment and ongoing input from the Project Steering Committee right through to Project Management and the Delivery Teams.

The key differentiators of the new Project Risk Management models are:
- Emphasis on earlier identification of risks
- Consideration of a broader array of risks potentially impacting the organisation and / or the project
- Greater commitment and involvement from all levels within the project
- Objective and independent management of the risk framework and activities
- Increased emphasis on open and frank communication of risks
- Broader accountabilities and responsibilities for the identification and management of risks

The reasons and benefits in adopting such a model will be discussed in greater detail.

Mark Crichton
Director Risk Services
Risk Wizard, Australia

Mark Crichton is Director of Risk Services for Risk Wizard.

Mark is primarily involved in the implementation of tailored risk management programs for clients throughout Australia. This involves the integration of RISK WIZARD® software into client's risk based audit and risk management programs.

Prior to joining Risk Wizard, Mark enjoyed over fifteen years internal auditing and risk management experience within the government sector, Australia's large public companies and leading consulting firms.

Mark is a founding member of the Australian CPA's Corporate Governance Task Group and is a regular presenter at industry conferences and other professional seminars.

Mark holds MBA, CPA and CISA qualifications. He is also a member of the Institute of Internal Auditors, Institute of Risk Management and the Australian Computer Society.

What to look for in a Risk Management Reporting System
Mark Crichton

What is risk management?

Sounds like a simple question doesn't it? But I bet it you asked 10 people in your organisation you would get 10 quite different answers. A couple will be looking at big strategic risks, such as loss of market share and changes in government policies. Others will consider risks as something that may cause a fire in the building or the loss of their computer system. For some of the ten people, risk might be the chance of their staff all being sick with the flu.

Risk is a very unusual aspect of our business and everyday lives.   It can vary significantly depending on the type of organisation (Federal, State, Local Government, Private Companies, Public Companies, Not for Profits etc), the industry (Banking and Finance, Mining, Agriculture, Services, Government etc). It depends on the work group you work in (marketing, accounts, research, distribution etc). It depends on what level of the hierarchy you may sit within (Executive, Senior Manager, Officer, Graduate). It also depends on the particular role you play within the department. We also need to consider that some risks come from the external environment, such as competitors, regulators, society and the environment etc. Put all this together and what you have is a very dynamic environment, known as business risk.

Risk is very pervasive. Risk is many things to many people. Managing risk is not easy and if it is not managed properly, it can become one of your biggest risks.

And unfortunately, there are not too many people out there showing or telling you how to manage risk. Sure, there are lots of consultants that are quite happy to do risk reviews and leave you with a traffic light report, but when it comes to providing a process and system for managing risk, there is very few.

Whilst a risk reporting system is by no means the complete solution, it can go a long way towards assisting with the effective management of risk within and organisation. Good risk management reporting systems should have the following attributes, which we will go into in a bit more detail:
- Easy to use
- Follows a similar risk methodology to the organisation
- Provides a range of reporting options
- Risk distribution analysis
- Drill up/down capability
- Strategic/operational focus
- Scalable to the Enterprise level
- Mobility out of the office
- Micro/macro risk measurement
- Multidimensional risk analysis
- Risk mitigation cost/benefit analysis
- Risk treatment strategies and target setting

Colin Cropley
Director
Contract Project Management Pty Ltd, Australia

Colin graduated as a chemical engineer from the University of Melbourne. He is a Project Management Professional (PMP) certified member of the Project Management Institute and a Certified PRINCE 2 Practitioner.

He has had first-hand experience as a Project Manager for major minerals processing projects as well as varied project engineering, project management and project services experience in the oil and gas, automotive, building and chemical process industries over a career of more than thirty years. He has managed new technology development, pharmaceutical research and economic feasibility analysis.

Over the last 12 years, Colin has developed particular project planning and cost control expertise, initially through contracting to the Australian distributor of Primavera project management software for two years, providing technical support and training, as well as consulting services.

He worked for five years in the 1990s on projects for BHP Engineering, BHP Direct Reduced Iron (Planning Manager responsible for successful recovery of the construction & commissioning schedule of the >$2bn HBI Project), BHP Steel, BHP IT (including 6 months at Centrelink in Canberra setting up a project management system to manage the IT infrastructure), BHP Minerals and BHP Petroleum (including coordinating a study to build a natural gas pipeline from Iran to Pakistan).

More recently, Colin has worked on project management in the IT environment, with assignments for Telstra, VicRoads IS Dept, Westpac Financial Services IT Dept (implementing a project methodology and Program Office with a colleague) and the implementation of a journey planner application for public transport usage at a call center and a public transport website. He is currently coordinating a major international gas pipeline study and consulting to mining and power industry clients.

He guest-lectures in Project Management at Victoria University of Technology and has written and presented five papers on project management-related topics. He has devised and conducted many training courses for Primavera P3 and SureTrak.

"Managing Project Performance Expectations in a Volatile Environment using Risk Management Software"

Colin H Cropley

Projects are expected to meet cost and time estimates made for them when they are initiated and planned, as well as scope and quality requirements. However, these expectations are often not supported by realistic assessments of the uncertainties applicable to those estimates. As a consequence, many projects, particularly in the IT industry, but also in other sectors, have exceeded their original budgets and completion deadlines, sometimes grossly, to the point of cancellation.

This presentation shows how cost and time uncertainty can be systematically assessed and modelled using Pertmaster risk analysis software in conjunction with widely used project planning applications Microsoft Project and Primavera Project Planner. Volatile project environments can be evaluated to quantify their cost and time effects on project activities using probability distributions for durations, costs and even whether certain groups of activities happen at all.

After a brief review of Risk Management principles, the duration and cost of a model project will be calculated deterministically by critical path method, then analysed probabilistically during the presentation. The deterministic time and cost outcomes will be compared with the information obtained by risk analysis to demonstrate the value of realistically assessing risk in managing expectations and maximising the probability of project success.

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ABSTRACTS OF PRESENTATIONS

Stream 9B : Performance Issues
Federation Ballroom North, AM Friday 21-Feb-2003

Chris Yardley
General Manager
Alltech Communications Pty Ltd, Australia

Chris has been in the computer business since the time when the main-frame was predominant and the hardware profits such that we gave away the software and the project support. Everything was a "promise" especially as the lead-time for the computer was as long as two years. "Here are the software manuals and the instructions for building the computer room, and you had better take six card punches to prepare programs and data. We'll be back".

Times have changed. Demonstrable "off-the-shelf" software and fast implementation are the norm. Networks can be the deciding factor in terms of performance and performance against the service level agreements demanded by the end-user. Alltech Communications, a spin-out of Adacel Technologies of Melbourne, are a Canberra-based full-service organisation working in the area of predictive network management or as we sometimes call it application response-time network design.

Alltech's customers cover the full spectrum of network users in Australia and New Zealand including the service providers, equipment manufacturers and the enterprise. The multi-function software is used for, amongst other things, capacity planning, application performance, equipment design and performance and quality of service studies.

A project manager by training Chris has worked extensively in Europe before a five-year stint as technical director for a major computer provider in South East Asia. He has subsequently worked in New Zealand for 4 years and Australia for the past 12 years. He has progressed from the largest of Multi-nationals to now working with an SME. Happy days.

How does your network perform? And in the future?
Chris Yardley

Every organisation these days relies on its network to a lesser or greater degree. However, when we try and discuss network performance we are given plenty of "complaints" along the lines of "it suddenly goes slow", "e-mails take forever" or "it was good before we added the new financials system".

It is a fact of life that networks have grown, often without adequate planning, but more often in such haste that planning and documentation was left to later and because of the scarcity of network engineers your network manager has subsequently moved on to bigger and more complicated challenges.

Classically networks have been designed :
➢ Buy and try
➢ Rule of thumb
➢ Spreadsheet using the designers expertise, but are we using up-to-date data, and
➢ [The preferred methodology] - predictive network modeling.

The speaker will demonstrate what can be achieved through off-line modeling :

1) We shall build a model of a network, and set service levels,
2) We shall add a new application to see if service levels are affected? If they are affected / how? why? any what can be done to correct any problems,
3) As we are working off-line we can test any number of remedial solutions that correct the problems,
4) We look at the effect of time and increased traffic levels on the network that has been corrected to run the new application.

We promise that this will prompt in the audience an immediate interest as they recognise how these tools can be used in their own organisations. It is not as costly as you might expect and if you do not have the appropriate staff to use the tools we can consult to you.

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SPONSORS

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Asia-Pacific Defence Reporter

Asia-Pacific Defence Reporter

Established in 1974, the Asia-Pacific Defence Reporter provides expert reportage, background analysis of defence, security and geopolitical issues in the Asia-Pacific region.

Almost three decades of experience underpin its coverage and bolster its reputation.

The Asia-Pacific Defence Reporter serves the Australian and international defence community, industry, and other subscribers ranging from political leaders to academics with accurate, relevant and insightful information.

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- Focuses on issues and developments impacting on the Asia-Pacific region within it and from elsewhere
- Is written by specialists in defence, strategy, politics and conflict analysis
- Critically acknowledged as reporting in a balanced and objective manner
- Being Australian-based, does not face the constraints imposed by many governments in the region on publications covering defence, politics and security issues.

Australian Defence Business Review (ADBR)
Australia's most prestigious defence business magazine

Established as a fortnightly industry newsletter back in 1982, the publication has been continually upgraded and is now well established and highly regarded in Defence, homeland security and industry circles.

ADBR consistently delivers high value-added commentary and analysis of the key issues facing the Australian Department of Defence and the national border security community, and how consideration of these issues filters down into new business opportunities for commercial enterprises.

The rapidly-changing global strategic outlook and its impact in the Asia-Pacific region has seen the Australian Government move to an annual cycle of revisions to its security analyses, meaning constant adjustments now occur to the structure of the Defence organisation and the prioritisation of major capital expenditures contained in the Defence Capability Plan. Added to these security issues, is the expanding counter-terrorism agenda. ADBR keeps readers up to date, in detail, on these shifts in Defence and internal security policy, and related commercial activities.

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In 2003, ADBR continues to forge further ahead of its competitors with our focus on highly researched and insightful articles. Great changes are taking place in the way advanced defence forces plan for, and undertake combat. This is often referred to as the "Revolution in Military Affairs" (RMA) or the knowledge edge. The Australian Government is also now fully committed to the international war against terrorism, and has made substantive changes to Government administrative structures to accommodate this commitment. Since May of 2002, ADBR has led its competitors in reporting a full analysis of these changes.

Inevitably, adjusting to rapidly changing circumstances in Australia's national defence situation will substantially change the way defence companies organise themselves in order to successfully exploit new opportunities, particularly those emerging from the thirst for intelligence and better quality knowledge, and overall management of military forces arising from the shift to the network enabled warfare model now sweeping across the Australian Defence Force.

ADBR's objective is to head into its 22nd year of continual defence publishing in 2003 based on its established record of consistent delivery of high value-added analysis and commentary for defence company executives and defence strategists on all the issues raised by Australia's changed post-11 September 2001 outlook.

(website: http://www.adbr.com.au)

AUSTRALIAN PERFORMANCE MANAGEMENT ASSOCIATION

The Australian Performance Management Association is a non-profit professional association. Our goal is to provide an exclusive forum for the free exchange of information and a network of colleagues in Project Performance Management and other quantitative project management disciplines.

AIMS AND OBJECTIVES

- To provide a forum for the free exchange of information with respect to performance measurement aspects of project management.

- To foster recognition and professionalism in performance measurement disciplines.

- To coordinate and encourage governmental, industrial, and educational efforts toward improved application in the performance measurement disciplines.

- To develop and disseminate common terminology and techniques so as to improve communications among the personnel in these disciplines.

- To provide the vehicle for successful interaction between the users and suppliers of computer hardware and software systems for performance measurement in project management.

- To provide guidelines for instruction and education in performance measurement in project management and encourage the growth and further development of career opportunities in these disciplines.

- To foster the integration of the technical, cost and scheduling aspects of performance measurement in project management.

- To establish a library and source publications of interest and make them available to members.

WHO TO CONTACT

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Exec VP – Kim Williams - austpma_exec_vp@austpma.org.au
VP Finance – Patrick Weaver - austpma_vp_finance@austpma.org.au
VP Membership – Chris Kharsas - austpma_vp_membership@austpma.org.au
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NSW Chapter – Claude LeComte - austpma_president_nsw@austpma.org.au
VIC Chapter – Mark Ruffell-Hazell - austpma_president_vic@austpma.org.au
SA Chapter – Jamie Forgan - austpma_president_sa@austpma.org.au

MEMBERSHIP

What do you get for your membership?
- Regular Chapter meetings with Guest Speakers and Product Demonstrations (Contact your State Chapter President for further details)

- Quarterly Newsletters and regular articles of interest via e-mail. (Please advise your e-mail address)

- Special Members only area on the AustPMA web-site

- How to apply for membership? Download one of the forms from the website www.austpma.org.au and send to the address on the form

Boeing Australia Limited

A Long Term Commitment to Australia – Building the Future Together

The Boeing Company is the major supplier of miliary and commercial aircraft to Australia and has been involved in the Australian aerospace and defence industries for more than 65 years.

In the past ten years alone, Boeing has invested more the $350 million in Australian facilities and the employment and training of Australians; more than $100 million in technology transfer; $200 million in local research and development; and has exported aerostructure components worth some $2.0 billion.

Boeing Australia Limited, a wholly-owned subsidiary of The Boeing Company, is a high technology company specialising in design, development, manufacture and installation of complex defence and commercial systems, including a significant role in the development of the B737 Airborne Early Warning and Control (AEW&C) aircraft for the Royal Australian Air Force.

Boeing Australia is headquartered in Brisbane and has staff in 16 locations around Australia supporting defence and commercial customers.

Australia's Most Capable Aerospace Enterprise

Boeing Australia's capabilities include: systems integration and major defence project and sub-contractor management; software engineering, design, test and development; aircraft weapons, avionics and EW systems; aircraft assembly, modification, maintenance and support; command, control and communications systems; information and surveillance systems; communications and information management systems; through-life support for major defence equipment and systems; integrated logistics support; operation and maintenance of defence communications and support facilities; and the manufacture of aerostructure components and electronics systems.

To enhance and support these capabilities, Boeing Australia has full access to the technology and know-how of The Boeing Company, the largest aerospace and defence systems integration company in the world.

A Leader in Quality

Boeing Australia's mission, to help our customers improve their business, is achieved through the application of proven and mature quality systems. These have achieved ongoing third-party certification against ISO 9001:2000, and action is currently underway to implement AS 9100.

To further enhance these systems, Boeing Australia has adopted the process of Lean Enterprise, the primary focus of which is the continuous improvement of efficiencies in the company's business processes; allowing Boeing Australia to deliver measurable savings to its customers.

Products and Services

- Large-scale systems integration
- Systems-of systems architectures
- Communications and security systems development
- Command and control systems development
- Data fusion
- Airborne systems integration (weapons, communications, navigation, electronic warfare)
- Systems and software engineering
- Systems Analysis Laboratory
- Operational analysis
- Systems support analysis
- Value chain management
- Global development
- Aircraft fleet management, including:
  - global support
  - aircraft assembly
  - aircraft upgrade and modification of mission and aircraft systems
  - aircraft maintenance
  - safety critical software development
  - systems integration laboratories
  - Integrated Logistics support
  - supply chain management
  - component repair and manufacture
  - training system development and support

Address
Boeing Australia Limited
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Telephone: 07 3306 3000
Fax: 07 3306 3299
Website: www.boeing.com.au
Contact: Terry Brown

PMI Canberra

Background

The Canberra Chapter of the Project Management Institute (PMI) is the local representative of the PMI - a non-profit professional association founded in 1969, which has almost 100,000 members in more than 100 chapters worldwide. The PMI is internationally recognised as the official certifying body for the project management profession and establishes industry standards, provides seminars, education programs and professional development and certification training and events.

Find out more about the PMI globally by visiting the PMI HQ site at **www.pmi.org**. PMI membership is divided into several membership categories. Application is available on-line at: **www.pmi.org/membership/apply.htm**

The Canberra Chapter mission is to be a vibrant chapter, which leads and leverages its local and global resources and networks to increase awareness, recognition and support for the project management profession in the ACT.

Our goals supporting this are twofold:
- Enabling PMI members to operate effectively and progressively as project managers within this environment.
- Partner with PMI components and industry leaders to create a project management culture of excellence within the ACT and surrounding region.

Member Benefits

As a PMI member you will benefit from the experience of a talented group of professionals facing the same project management concerns and challenges. Members benefit from the PMI on several fronts including:
- Access to membership, PMI listings of project management and related professionals, and special interest groups.
- Access to PMI's global career resource services including on line bookstore and annual seminars.
- Discounted certification and access to the globally recognised Project Management Professional (PMP) certification process including access to preparation materials and courses.
- Invitations to events and seminars with world-class speakers on project management-related issues. This offers an opportunity to meet and talk with peers in the project management industry but also provides you with accreditation points to maintain your PMP status.
- Access to comprehensive, continuous education, training and personal development programs including local study groups membership.
- Access to PMI publications (12 per annum) and professional journals (4 per annum), which contain occupation-specific and general interest articles.

Contact us

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Software Engineering Australia

About Software Engineering Australia

Software Engineering Australia (S|E|A|) is a National organisation supported by the Federal Government through the Department of Communications, Information Technology and the Arts, with a mission to improve software acquisition and development capabilities in Australia.

As an objective, independent authority on software engineering capabilities, S|E|A| works collaboratively with the Australian software industry to increase accessibility to the products, services, information and tools needed to help companies identify and achieve their own software improvement goals.

Software Engineering Australia offers executives and IT professionals training courses, workshops and industry briefings Nationally, covering a range of topic areas from Business of Software to Emerging Technologies and Methodologies and Standards. Further to this, S|E|A| also works in collaboration with industry experts to produce a resource journal entitled 'Software'. Internationally recognised, the 'Software' Journal promotes Australian innovations and expertise, case studies and best practice.

Now S|E|A| is turning its focus to better software governance. While it is clear that there is a need for increased awareness of software governance practices at the Board level, S|E|A| sees an even bigger reason for improved software governance: the need to ensure a self-perpetuating, sustainable Software Process Improvement industry for Australia.

At S|E|A| we believe that to improve the industry, it isn't enough to just train software developers to do a better job. Instead, an holistic view and an action plan, that includes the buyers and users of software systems as well as developers, is required. This is how S|E|A| is helping to lift the history of dissatisfaction with software acquisition and improve software capability in Australia. For more information please visit www.seanational.com.au or call us 1300 884 888.

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EXHIBITORS

Defence Reporter
Asia-Pacific

Asia-Pacific Defence Reporter

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(website : http://www.adbr.com.au)

7TH ANNUAL AUSTRALIAN INTERNATIONAL PERFORMANCE MANAGEMENT SYMPOSIUM

CorVu Australasia Pty Ltd.
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CorVu's Mike Cowper,
Director of Business Performance Management Solutions, will be speaking at **2 pm**, **Wednesday 19 February**.

This session will focus on maximising the use of technology to drive strategic performance management systems, exploring:

> Alignment of technology to cope with an adaptive performance management system
> Effective strategic performance management systems: using the Balanced Scorecard to implement strategy
> Current business challenges: translating strategy to action and relevance of technology
> Case studies - successful implementation experiences
> Resolving common system issues and problems
> Unveiling successful practical approaches to technological business solutions that support and propel the business forward

Visit CorVu at booth 12!

CorVu is a global provider of enterprise performance management solutions, offering information analysis capabilities that empower our customers to achieve strategic objectives and improve business performance. With over 4000 customers, CorVu offers comprehensive business intelligence, balanced scorecard, risk performance management, corporate governance and budgeting solutions. To find out how CorVu can improve your business performance, please call 1 800 500 644 or visit www.corvu.com.

CorStrategy is Enterprise Performance Management

More than ever before, organisations require a comprehensive performance management solution to help effectively execute strategy and achieve goals. To meet this need, CorVu® developed **CorStrategy™**. This Enterprise Performance Management (EPM) suite helps organisations reach greater levels of performance by integrating and aligning key management processes, such as strategic planning and development, risk management, corporate governance, and budgeting. CorStrategy creates a clear understanding of corporate strategy and establishes accountability, while enabling managers to proactively monitor actions and performance against company targets. Seamlessly integrated with the robust business intelligence capabilities of **CorBusiness**, CorStrategy offers a complete solution for EPM analytics.

CorStrategy can be configured for any organisational structure and any EPM methodology, whether deployed in one department or across a global enterprise. Comprised of three fully integrated management applications – CorStrategy.Scorecard™, CorStrategy.Risk™ and CorStrategy.Finance™ – CorStrategy is a unique, 100% web-based enterprise performance management solution. CorStrategy enables executives to communicate, monitor and manage strategy, and it deploys in the speedy timeframe necessary to derive maximum return on investment.

CRM Business Solutions Pty Ltd
…engaging employees…delivering better then expected results…

CRM Business Solutions (CRMBS) is a Sydney based consulting practice and in conjunction with its Associate companies has been providing business services to Australian companies for over 9 years. CRMBS' primary Purpose lies in the development and delivery of Business Improvement / Performance Management processes and Internet enabled software. CRM Business Solutions holds the Australian licence for Focus PM ©,

CRMBS and its Associate companies, Corporate Partners and CRM Consulting, work with clients to deliver measurable Business Improvement strategies which will consistently deliver high levels of performance and provide the business with the flexibility to respond to the ever changing influences of the external environment. Through effective Performance Management strategies and communication processes we work with our clients to ensure the proactive engagement of employees by ensuring their focus and activities remain aligned with Strategies and defined measures.

Consulting activities include: Performance Management reviews and implementations; Climate / Attitude Surveys; Strategy deployment; Organisational Reviews; Behavioural Analysis and Recruitment.

Focus PM is an internet based Business Improvement / Performance Management process which links Strategy, Mission and Purpose, Values, Stakeholders, Key Result Areas (KRAs), Key Performance Indicators (KPIs), Activities, Projects, Job Descriptions, Employee details and Performance Appraisals. Focus PM can be linked to most databases and by utilising the Business Intelligence capabilities of Cognos will deliver online management information relating to activity focus, resources employed and outputs obtained. Focus PM engages employees and obtains positive commitment and accountability.

Cognos Pty Ltd
End-To-End Intelligence

Cognos is the world's leading business intelligence company. Founded in 1969, Cognos is an international corporation with corporate headquarters in Ottawa, Canada, and U.S. sales headquarters in Burlington, Massachusetts, U.S.A. The company does business in more than 120 countries and employs over 2,500 people worldwide. With more than 2.4 million BI licenses in over 18,000 organizations worldwide, Cognos solutions are licensed for use by a wide range of customers, including Global 3000 corporations. Our business intelligence solutions and services are sold directly and are also available from more than 3,000 worldwide partners and resellers and supported by an experienced field force of more than 1,300 customer-facing personnel.

A publicly held company, Cognos is traded on Nasdaq as COGN and on the TSE as CSN. The company's fiscal year runs from March 1 through February 28. Revenue for the fiscal year 2001 (ended February 28, 2001) was US$495.7 million. Cognos is the healthiest Business Intelligence Company in the world, from a financial perspective as well as support and product vision and direction. We have operated in Australia for 16 years and have 80+ staff.

Our management team which goes from account management to services delivery management to business management, average over 20 years in the IT industry. The average staff tenure in management at Cognos Australia is around 12 years!

Sydney is the support centre for the Asia/Pacific region and we continually win awards for our outstanding support service. We also have an extraordinarily high average length of service with our delivery personnel. Finally, we have over 1,500 customers in Australia and a long history of successful implementation services with these clients. Cognos has been ISO 9002 certificated since 1996.

Ferguson Project Management Services

We believe in establishing partnerships to promote a common goal – the successful outcome of projects.

Ferguson Project Management Services Pty Ltd (FPMS) is a client-focused organization with 20 years of Experience in Project Management with particular expertise in Performance Management, Productivity, Risk Management and Training. We have a broad base of skills that allow us to provide Management Services to a large selection of clients from a diverse range of industries worldwide. These include Commonwealth and State Government Departments, Defence, Financial Institutions, Health Boards, Overseas Development Agency, European Commission, and other blue chip organizations.

The FPMS emphasis is on nationally and internationally recognized best practice management principals and their application within a variety of environments. Our client base is testimony to our commitment to improve performance for our clients through the application of unique management procedures and techniques designed for greater management control.

The powerful combination of project management, performance management and PRINCE2 together with our commitment, professionalism, and adaptability, allows us to provide quality solutions that meet and exceed the needs of our clients.

The FPMS approach delivers world-class systems to provide competitive advantage for contractors, accountability for clients and consistency for all.

FPMS are OGC (CCTA) accredited PRINCE2 training organization (ATO) and registered consultancy. This accreditation for both consulting and training enables us to provide you with a full range of support servicing including:

- PRINCE2 Consultancy
- PRINCE Coach
- PRINCE2 Training

- PRINCE2 Examination revision workshops
- Project Support
- Project Assurance

Our Training Services are based upon current best practice in accordance with PMI PMBoK, PRINCE2 and National Competency Standards.

FPMS have Standing Offer with the Department of Defence to provide PRINCE2 and PMM training and consulting services.
FPMS is a member of the Panel of Training Providers to the Australian Customs Service.

Our corporate and public seminars include:
- PRINCE2 Project Management Methodology
- Generic project management
- Risk Management
- Project Planning
- Management of Change

Our training support services include:
- training needs analysis
- course design and development
- workplace assessments

Planit

Specialists in test management solutions, helping organisations perform effective and efficient testing.

www.planit.net.au

Planit is unique in the Australasian market offering integrated solutions to business and government that combine testing best practice, best of breed tools, training, tester certification and a comprehensive range of professional services.

Aligning IT with the business strategy, Planit's solutions strengthen your business, refine the way you operate, reduce deployment times and improve the processes, quality and the skills of your testing team.

Planit solutions support the full delivery cycle and are tailored to your specific needs, allowing you to benefit from existing technology infrastructure. Planit ensures mission critical applications are of the highest reliability and initiatives are successfully implemented so that you can derive maximum business value.

Offering an independent approach to risk reduction, Planit has extensive experience across all platforms, applications, networks and operating systems. Industry specific solutions are delivered to the; financial, insurance, superannuation, telecommunications, defence, retail, healthcare, transport, gaming, utilities and government sectors.

With a proven track record of success, Planit's scalable solutions include:

- Test strategy & planning
- Enterprise testing – Acceptance, Systems, Integration, Regression & Performance
- E-business testing
- Project management
- Outsourced testing
- Test resource
- Skills transfer
- Training and development
- Test automation

For further information on Planit's test management solutions contact:

T: 02 9954 0699
E: info@planit.net.au

PTC

The way to Product First™

Our Product First strategy is based on a very simple tenet: put your product first and everything else will follow. You aren't in the business of implementing processes; you're in the business of creating great products. So, your business should focus on product. After all, that's what your customers focus on. A constantly improving, exceptional product. At PTC, we're dedicated (and have been for twenty years) to radically changing the way you think about what is possible in product development and then giving you the tools to accomplish it. The Product First strategy seeks to celebrate the spark of a new idea, the passion to create something better than what already exists. At the end of the day, that's why you got into this business in the first place.

Aerospace

When you're designing in aerospace, your engineers must be able to trust that their design is going to fly, literally. As core members of industry consortiums like ENHANCE, we're well aware of all issues critical to the aerospace industry. Our software is used to develop and test products ranging from satellites to commercial, military and corporate aircraft to crew vehicles for NASA. We know the exacting standards that are so critical in aerospace programs.

Defense

Defense contractors worldwide are benefiting from our superior design and collaboration tools. These solutions address many of the challenges inherent in managing huge defense industry programs. Unique collaboration and design solutions help defense contractors speed the iterative design process by providing controlled access to shared information. Defense contractors have demonstrated the necessity of collaboration between customers, systems integrators, contractors and suppliers and our solutions help resolve the defense industry's challenges of delivering products faster, better and cheaper.

Case Studies

Lockheed Martin JSF Integrates eCommerce Strategy with PTC Solutions

Opportunity
To electronically share project information with the government without sacrificing security.

Business Initiative
A need to shorten the time spent providing the government with a Cost Performance Report by transitioning from paper to electronic reports.

PTC Solution
PTC's Windchill was implemented to manage project data, allowing the government to electronically review Cost Performance Report information real time, instead of the previous six week delay.

Results
Using PTC Solutions has enabled Lockheed Martin JSF to:

- Provide the government with real time data
- Maintain uncompromising security
- Automate the vast majority of the master plan

"PTC Solutions provide us with the security and functionality that has really bolstered our eCommerce strategy and improved our collaboration with the government."

~ John Burdett, Systems Development and Demonstration Planning Manager, Lockheed Martin

About PTC

Founded in 1985 as Parametric Technology Corp., PTC (Nasdaq:PMTC) develops, markets, and supports software solutions that help manufacturers win with superior products.

Rated the top PLM solution provider by AMR, PTC is the world's largest software company with a total commitment to product development. The company services more than 33,000 manufacturing customers worldwide.

PTC solutions include a best-of - breed suite of mechanical CAD tools and a range of Internet-based collaboration technologies that enable manufactures to create product models, collaborate on design both across the enterprise and the extended supply chain, and control digital product information throughout the product lifecycle.

By applying PTC product development solutions, manufactures are realizing streamlined engineering processes, improved product quality, greater design innovation, optimized product information management, and reduced cost and time to market cycles. Further information on PTC is available at **www.ptc.com**

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Software Engineering Australia

About Software Engineering Australia

Software Engineering Australia (**S|E|A|**) is a National organisation supported by the Federal Government through the Department of Communications, Information Technology and the Arts, with a mission to improve software acquisition and development capabilities in Australia.

As an objective, independent authority on software engineering capabilities, **S|E|A|** works collaboratively with the Australian software industry to increase accessibility to the products, services, information and tools needed to help companies identify and achieve their own software improvement goals.

Software Engineering Australia offers executives and IT professionals training courses, workshops and industry briefings Nationally, covering a range of topic areas from Business of Software to Emerging Technologies and Methodologies and Standards. Further to this, **S|E|A|** also works in collaboration with industry experts to produce a resource journal entitled 'Software'. Internationally recognised, the 'Software' Journal promotes Australian innovations and expertise, case studies and best practice.

Now **S|E|A|** is turning its focus to better software governance. While it is clear that there is a need for increased awareness of software governance practices at the Board level, **S|E|A|** sees an even bigger reason for improved software governance: the need to ensure a self-perpetuating, sustainable Software Process Improvement industry for Australia.

At **S|E|A|** we believe that to improve the industry, it isn't enough to just train software developers to do a better job. Instead, a holistic view and an action plan, that includes the buyers and users of software systems as well as developers, is required. This is how **S|E|A|** is helping to lift the history of dissatisfaction with software acquisition and improve software capability in Australia. For more information please visit www.seanational.com.au or call us 1300 884 888.

Tanner James Management Consultants

Tanner James is a Management Consultancy specialising in the provision of Project Management and Programme Management training and consultancy services. Tanner James is the leading provider of accredited PRINCE2 services within the Asia Pacific region, having implemented PRINCE2 on several hundred projects with a value of more than 20 billion dollars. Tanner James can provide you with a solution to assist your people, your projects or indeed your whole organisation in improving your Project Management. Based around PRINCE2 (**PR**ojects **IN C**ontrolled **E**nvironments version 2), an internationally recognised method for Project Management, our PRINCE$^{Plus™}$ System provides a total project management solution combining training, workshop facilitation, coaching services and a web-enabled delivery mechanism, which can be tailored to fit with your organisation requirements. Programme$^{Plus™}$, our Programme Management solution, is based around Managing Successful Programmes, an internationally recognised method for Programme Management. An overview of our products and services is provided below.

PRINCE-in-Practice™ Classroom Training
PRINCE2 for Practitioners - Targeted at Project Manager's, Team Manager's and Team Members, this hands-on 4-day course will provide delegates with a solid model for setting up and successfully managing projects. Case Study sessions are used to reinforce learning and will run selected real project scenarios (your projects) through the lifecycle of the project.

PRINCE2 Overview - Targeted at Team Members and Business Representatives, this one-day session will provide delegates with a commonsense well-structured framework for successfully managing projects based around the PRINCE2 process model and underpinning components.

PRINCE2 Board Room Briefing - Targeted at senior management who are likely to be involved in the directing of projects as apposed to the day-to-day management, this one-day or half-day session provides a clear framework for decision making throughout the life of a project based around the PRINCE2 Directing a Project process.

PRINCE-in-Practice™ Workshops
Tanner James offers it's PRINCE-in-Practice Workshops to assist your project manager's/projects in the effective application of project management. The Implementation Series workshops are focused on assisting your projects with the pragmatic application of PRINCE2 at specific points in the project life-cycle such as initiating the project and setting up project controls. These workshops are designed to be used on a just-in-time basis and are focused on driving your projects through the project management processes including the creation of management products as appropriate. The Skills Series Workshops focus on improving the application of key areas of project management by improving skills. These workshops are designed to be used on an as required basis, but will typically be attended by those who wish to improve key areas of their projects.

The PRINCE Plus™ System
The Tanner James patented PRINCE$^{Plus™}$ System uses live syndicate work within PRINCE-in-Practice Training, PRINCE-in-Practice Workshops and PRINCE-in-Practice Consulting to capture initial knowledge of how the PRINCE2 Project management Method can be applied within your organisation and for your project types. The PRINCE$^{Plus™}$ Tool component within the system is used to document how the PRINCE2 method will be applied within your organisation. The PRINCE$^{Plus™}$ Tool will provide tailored advice to your Project Manager's and other project staff on how to apply PRINCE2 to your projects as well as acting as a launch pad for tailored templates with corresponding completion instructions and CBT options (if purchased). The option also exists to provide ongoing tailoring to the method as required.

Consulting Services
Tanner James provides a range of consulting services to assist your project manager's/projects in improving their project management and programme management.

Computer based Training (CBT) Products
Tanner James offers a suit of CBT products for PRINCE2, Project Management Fundamentals, PMBOK, Risk Management and Programme Management, providing a cost effective solution for training those in your organisation who either do not require full classroom training or those who are unable to find time to attend classroom training.

Terra Firma

Our Aim

Terra Firma's aim is to provide independent and professional management services that add value through innovative and proven systems, processes and techniques to achieve tangible time, cost and quality benefits for our clients.

Our Background

Established in 1995, as a professional Project Management Services company, Terra Firma have since enjoyed strong growth in a diverse array of industries, have added Business Analysis services to our expanding portfolio and established offices in Sydney, Melbourne, Canberra and Adelaide.

Our People

Our strength is the quality and character of our people. Our internal focus on the personal and professional development of our people underpins the level of commitment and quality of professional service that we offer to our clients.

Your Advantage

To provide a service, not merely resources, Terra Firma draw upon our combined knowledge base and experience, capturing specialist expertise from across the organisation as required. This strength in depth, is seamless to our clients, yet results in a superior service and higher quality project outcomes. Our aim is to always exceed expectancy.

Our Methodologies

Terra Firma's project management methodologies are closely aligned with and draw upon both the Project Management Body of Knowledge (PMBOK) guidelines and PRINCE2 methodology.

Our Capability

Our Processes and Guidelines have been developed and refined through successful application within the IT & Communications, Government, Defence, Infrastructure, Engineering and Events industries.

Contact Us

Terra Firma Sydney	Terra Firma Melbourne	Terra Firma Canberra	Terra Firma Adelaide
Stuart Don or Neil Timmins	Nicholas Bartels	Martin Vaughan	Mark Martin
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www.terrafirma.com.au

Australian Government Endorsed Supplier
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UNE Partnerships leads the field in the provision of public and corporate professional and vocational training and development, and consultancy services. It is also a Registered Training Organisation (RTO), registered to offer a full range of accredited vocational qualifications at all levels, nationally. Owned by the University of New England, one of Australia's oldest and most prestigious teaching and research universities, UNE Partnerships combines academic rigour and research with practice-based teaching and learning. All teachers and facilitators are academically qualified at the highest level *and* practising in the marketplace as leaders in their field to provide real-life expertise.

UNE Partnerships works with some of Australia's largest companies, government departments and authorities but also across the broad range of small business and professional service practices. The company's head office is based with the University of New England in Armidale, northern NSW, with representatives in Brisbane, Sydney, Melbourne and Canberra, and associated consultants in other parts of Australia and internationally.

FLEXIBLE DELIVERY OPTIONS
Distance delivery, intensive public workshops and in-house training are carried out in a range of subject areas. Clients choose the methods to suit their needs. A key feature of UNE Partnerships' programs is that they can *all* be offered in *all* delivery modes; for example distance, block residentials, tutorials, or combinations of methods, enrolling at any time to suit the needs of the learner.

UNE Partnerships offers customised, high quality learning experiences to individuals and groups to provide increased employment opportunities, a smarter, cohesive workforce and rewarding career opportunities. Access is available to educational pathways from Certificates through to graduate and postgraduate programs of UNE.

CURRENT STUDY AREAS
Programs include business administration, management and leadership skills and knowledge, human resource management, frontline management and project management plus a range of industry specialisations in medical and other health care practice management, health, aged and community services, property management and workplace training. Further details on current programs can be found at our web site: www.unepartnerships.com.au
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www.unepartnerships.com.au

UNE PARTNERSHIPS – THE EDUCATION & TRAINING COMPANY OF THE UNIVERSITY OF NEW ENGLAND

WST Pacific

www.wstpacific.com.au

WST Pacific is a full service organisation which has been providing project-oriented software products, training and consulting services since 1989. Using the company's project management industry knowledge together with the technical skills of a commercial application author, WST Pacific has the knowledge and professional experience to deliver solutions that meet current and future needs.

The company is the exclusive distributor of the Welcom suite of project management products which include:

❑ **WelcomHome®:** a web-based project portal and collaboration tool that allows all project participants to collaborate and share information through a common interface. WelcomHome provides a single portal to multiple applications, including:

- schedule integration with Microsoft Project 98/2000/2002® and Open Plan
- custom integration with other systems through Dataviews

WelcomHome is both customisable and extendable, allowing companies to create collaborative project portals that reflect the unique way they manage projects.

❑ **Open Plan®:** an enterprise project management system that substantially improves an organisation's ability to complete multiple projects on time and on budget. With multi-project analysis, critical path planning and resource management, Open Plan offers the power and flexibility to serve the differing needs of business, resource and project managers

❑ **Cobra®:** a powerful system for managing project costs, measuring earned value, and analysing budgets, actuals, and forecasts. It offers seamless integration with leading scheduling tools and unmatched flexibility to meet even the most exacting cost management requirements, such as the rigorous EVMS standard required by various governments around the world..

As well as the Welcom product range, WST Pacific also distributes HMS Software's **TimeControl®** and C/S Solution's **wInsight®**.

WST Pacific Consulting can tailor the above products as well as develop applications to suit specific client requirements. The company's software development team has experience with a wide range of technologies as well as corporate databases such as ORACLE® and MS SQL Server®. WST Pacific's structured software development methodologies ensure the delivery of robust software and the resulting systems are professionally documented and supported.

WST Pacific also offers a comprehensive choice of training programs for the Welcom product range, TimeControl and wInsight. To ensure users with different levels of experience are accommodated, topics range from basic operation to advanced customising techniques. Additionally, company consultants work in conjunction with organisations to adapt the standard courses to achieve particular client objectives

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ADDENDUM

Shireane McKinnie will deliver the Defence Keynote Address.

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David Castledine and Martin Skinner joint presentation at 2:00pm Wednesday (19-Feb) will now be delivered by David Castledine only.

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Steve Cathcart is the new speaker at 2:00pm on Wednesday (19-Feb). The title of his presentation is _"Performance Management – An HR Perspective"_

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Martin Vaughan's presentation has been moved from 11:00am Friday (21-Feb) to 2:45pm Wednesday (19-Feb)

_____

Aubrey Gonsalves presentation has been moved from 4:00pm to 2:45pm on the same day (Wednesday, 19-Feb)

_____

Diane Barbeler's presentation slot have been moved from 4:45pm to 4:00pm on the same day (Wednesday,19-Feb) and will occupy 2 presentation slots.

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Oscar Banda and Luis Contreras joint presentation at 4:45pm Thursday (20-Feb) will now be delivered by Luis Contreras only.

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Ian Salau will be presenting instead of Kevin Nevrous on 9:00am Friday (21-Feb). The presentation abstract remains unchanged.

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Caroline van Til is the new speaker at 11:00am Friday (21-Feb). The title of her presentation is _"Aligning Business Team and Individual Objectives Through Automated Performance Management"_

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The following speakers are unable to attend and present due to unforseen circumstances.

Mick Roche
Quentin Redman
Pankaj Kashmiri
John Schlichter
George Davis

REVISED PROGRAM (18th February 2003)

	Day 1 -Wednesday 19 February		
8.00	Morning Tea & Registration		
	FEDERATION BALLROOM (NORTH & SOUTH COMBINED)		
9.00	**Opening Remarks - Lloyd Carter** Managing Director, MTC AustralAsia Pty Ltd		
9.30	**Official Opening – Hon Fran Bailey, MP** Parliamentary Secretary to the Minister for Defence		
10.00	**Defence Keynote Address – Shireane McKinnie** Head, Electronic Systems Division, Department of Defence, Australia		
10.30	Morning Tea		
11.00	**Executive Perspectives – David Gray** Managing Director, Boeing Australia		
11.30	**Executive Perspectives – Alan Wakeham** Managing Director Defence Systems , BAE Systems		
12.00	**Executive Perspectives – Peter Spooner** General Manager, Ball Solutions Group Pty Ltd		
12.30	**Mark Martin – National President APMA**		
12.40	**Luncheon (ALBERT HALL)** **Sponsored by Boeing Australia Limited**		
	Stream 1 **FEDERATION BALLROOM SOUTH**	**Stream 2** **CENTENARY ROOM2**	**Stream 3** **FEDERATION BALLROOM NORTH**
2.00	**Perf Mgmt Case Study** **David Castledine** Cfocus Pty Ltd *Performance Measurement in Australian Naval Ship Refit and Repair*	**Cultural Issues** **Steve Cathcart** People Projects Australia *Performance Management – An HR Perspective*	**Strategic Performance Mgmt.** **Mike Cowper** Director, BPM Solutions CorVu Australasia *Balanced Scorecard*
2.45	**Perf Mgmt Case Study** **Patrick Weaver** Fallon Project Management P/L *Project Control – Trends to Systems Integration*	**Cultural Issues** **Martin Vaughan** Director Terra Firma Pty Ltd *Information Overload*	**Strategic Performance Mgmt.** **Aubrey Gonsalves** National Product Manager Ocean Group, Australia *Multi-level Performance Reporting*
3.30	**Afternoon Tea**		
4.00	**Perf Mgmt Case Study** **Jim Muir** Material Finance Division, DMO *Performance Management the Core of the Defence Materiel Organisation's Business Model*	**Governance** **Chris Dellit** Director Catalyst Consulting Australia *Alliances/Joint Ventures*	**Governance** **Diane Barbeler** Director The Coach House Leadership Centre Pty Ltd *Cross Cultural Mgmt*
4.45	**Perf Mgmt Case Study** **Paul Coles** Project Controls Manager RLM, Australia *Project Office Support*		
5.30	**Break**		
6.00	**Cocktail Party Reception** **(Atrium & Gallery)**		

PROGRAM

	Day 2 - Thursday 20 February		
8.00	Morning Tea & Registration		
	FEDERATION BALLROOM (NORTH & SOUTH COMBINED)		
9.00	**Executive Perspective – Eleanor Haupt** President, CPM-PMI		
9.35	**Executive Perspective – Adrian Inch** General Manager Program and Project Management, Telstra		
10.10	**Executive Perspective – Richard Pilcher** Senior Manager, Project Management Services, BHP Billiton		
10.45	**Break**		
11.15	**Executive Perspective – Ross Beattie** Industry Development Manager, Software Engineering Australia		
11.50	**Executive Perspective – David Norris** Director Application Management Services – Commercial Delivery, IBM GSA		
12.25	**Luncheon (ATRIUM & GALLERY)**		
	Stream 4 **FEDERATION BALLROOM SOUTH**	**Stream 5** **CENTENARY ROOM2**	**Stream 6** **FEDERATION BALLROOM NORTH**
2.00	**Investment Management** **Mark Heath** Managing Director MBH Management P/L *Investment Fundamentals*	**Software Projects** **Terry Wright** EGovernment Policy & Strategy Multimedia Victoria *Mgmt By Functional Size*	**Earned Value Management** **David Read** Director, Earned Value Systems **James Thompson** Project Manager Standards Australia International *New Australian EV Standard*
2.45	**Investment Management** **Orest Wasyluk** Dept of Veterans Affairs USA *Capital Investment*	**Software Projects** **Pam Morris** Managing Director Total Metrics *Tracking Functional Size*	**Earned Value Management** **Shane Huby** Acting Program Manager - EVM Defence Materiel Organisation Department of Defence *Simple EV Implementation*
3.30	**Afternoon Tea**		
4.00	**Performance Management** **Lynda Bourne** Snr Project Manager Mosaic Services P/L *Stakeholder Connection*	**Software Projects** **David Cleary** Snr Consultant Charismatic Software Metrics *Estimating Functional Size*	**Earned Value Management** **Geoff Roberts** Senior Consultant Primavera Systems Inc, UK *Simple EV Implementation*
4.45	**Performance Management** **Gary Lazarus** Electrical & Information Engineering Dept Sydney University *Virtual Teams*	**Software Projects** **Evelyn Richardson** Systems Engineering Doctorate Student University of South Australia *Technical Perf Metrics*	**Earned Value Management** **Luis Contreras** Snr Consultant, AzTech International, USA *Strategic Earned Value for Senior Management*
5.30	**Break**		
7.00	**Conference Dinner** **(FEDERATION BALLROOM)**		

PROGRAM

Day 3 - Friday 21 February			
8.00	Morning Tea & Registration		
	Stream 7 **FEDERATION BALLROOM SOUTH**	**Stream 8** **CENTENARY ROOM2**	**Stream 9** **FEDERATION BALLROOM NORTH**
9.00	**Project Management** **Ron Sulman** Director Rawlings Sulman P/L *ROI for PM*	**PRINCE 2** **Ian McDermott** Director Tanner James Management Consultants *Applying the Technique*	**Risk Management** **Ian Salau** Client Director Deloitte Touche Tohmatsu *Innovative Interaction*
9.45	**Project Management** **Joe Kusick** Snr Manager Raytheon Company USA *Project Independent Assessments & EVMS*	**PRINCE 2** **Ray Broadbent** Proj & Program Management Advisor CrimTrac Agency Programme Office *Application Case Study*	**Risk Management** **Mark Crichton** Director – Risk Services Risk Wizard *Risk Reporting*
10.30		**Morning Tea**	
11.00	**People and Performance** **Caroline van Til** IxP3 *Automation to Align Business Objectives*	**Performance Issues** **Kenn Dolan** Director Ferguson Project Management Services *Application Case Study*	**Risk Management** **Colin Cropley** Director Contract Management Pty Ltd *Risk Applicator*
11.45	**People and Performance** **Sean Kelly** Director CRM Business Solutions *Managing Expectations – Managing Performance*	**Performance Issues** **Tony Carter** Principal & Director Tallowillow Enterprises P/L *Innovative Interaction*	**Performance Issues** **Chris Yardley** General Manager Alltech Communications Pty Ltd *Network Performance*
12.30	**Luncheon (ALBERT HALL)**		
2.30	**Wrap Up and Farewell – Lloyd Carter**		
2.45	**7th Australian International Performance Management Symposium Concludes**		

Biography :   Shireane McKinnie, Head Electronic Systems Division, Department of Defence

Shireane McKinnie is the Head of Electronic Systems Division in the Defence Materiel Organisation. This division is responsible for acquiring and supporting electronic systems in the areas of Electronic Systems, Communication and Command Support. Shireane's previous position was Director General Electronic Warfare and Radar Systems which she held for three years in the Defence Acquisition Organisation, and as such was responsible for the successful project management of ADF acquisition projects within this technology area.

As Director General Electronic Warfare and Radar Systems in the Defence Acquisition Organisation she was responsible for the successful project management of ADF acquisition projects within this technology area. Prior to this appointment Shireane completed two years as Director General Naval Engineering Services (Director General Naval Materiel Requirements) the senior civilian engineer in the Navy. This position was responsible for the development of naval materiel requirements, materiel policies and provision of engineering services for projects to acquire new ships, submarines, aircraft, electronic systems and equipment.

Other senior positions held by Shireane in Defence included the Director Programming Communications and Computing in the Project Development Branch, Director Policy Development in the Project Policy and Evaluation Branch and Director Switching Systems Planning in the Communications Planning Branch. Responsibilities in these positions covered capability analysis, acquisition policy development, financial program management and project management aspects of the new capital investment and acquisition programs.

Shireane has also held positions with the International Relations Branch of the Department of Primary Industry and Energy, the Working Environment Branch in the Department of Employment and Industrial Relations and with the Overseas Telecommunications Commission prior to employment with Defence.

Biography :   Steve Cathcart, People Projects Australia

Steve has worked as an internal and external consultant in areas including Change Management and Learning and Development in a number of key projects, developing training programs with a focus on people management, along with lecturing at Swinburne University of Technology.

Clients include Cadbury Schweppes, Telstra, and Business Services Training (BST) along with prior roles with Simplot Australia and Yellow Pages Australia

The focus of Steve's work has been the application of sound learning and behavioral principles to create work environments, management competencies and practices to support effective Performance Management.

Steve draws on a varied background that includes his early experience as an industrial chemist, union delegate, and over a decade in sales before entering training then Human Resource Management.

Abstract :   Performance Management – An HR Perspective by Steve Cathcart

This discussion explores 3 fundamental aspects of effective management of individual performance.

The fundamental drivers of individual performance are behaviour, knowledge and resources. To change performance levels we must ensure all 3 drivers are managed.

Establishing measures and targets is certainly not a new concept however it is still contentious in many areas. Identifying what to measure may not be simple and choosing the wrong measures can have significant impacts on outcomes.

Finally bringing these concepts together in a process that provides for planning, communicating and maintaining effective performance management as a key business enabler and growth strategy.

These concepts are as applicable to specific change activities as they are to long-term performance management strategies.

Biography :   Ian Salau, Client Director, Deloitte Touche Tohmatsu

Ian Salau is a Client Director with Deloitte Canberra providing Enterprise Risk Services to public and private sector clients. He has recently completed reviews of project and risk management processes for the ACT Government Information Technology Group, the Defence Workplace Safety Project, the Department of the Parliamentary Reporting Staff and the Defence Housing Authority.

Ian's project management experience includes the Defence capital works programme, major refurbishment and construction projects and Defence test and evaluation. Ian was instrumental in the development and introduction of the Army Aviation Risk Management framework in the late 1990's and has developed high-level risk management plans for Army aviation operations in East Timor and Special Forces contingency operations for the Sydney Olympics.

Ian is a qualified helicopter instructor pilot and has a Masters degree in Management Studies (Project Management) from the University of New South Wales. He is a graduate of the Defence Management Diploma Program and the Defence Senior Officer Course.

Biography :   Caroline van Til, B.A., Principal Human Capital Division

Caroline has a Bachelor of Arts from the University of Melbourne. She is a member of the Australian Human Resources Institute (AHRI), Melbourne PC User Group, Australian Marketing Institute (Victorian Councillor), Member of Fast Company.

Caroline's early background in the workforce was based with the Shell Company of Australia as a Graduate. It was at Shell that Caroline established her project management and consulting capabilities in: EBA structural efficiency, change management – organisational design & effectiveness, shape & function, HR Planning, Skill / Competency matrix development, HR Concept development, Job Design and Job Evaluation, Remuneration Benchmarking and Packaging, Performance Management, Staff Development and Planning and Employee Career Transition Counselling.

Caroline after Shell, commenced her career in human resource consulting. Over a three year period, Caroline finessed her consulting and general management skills in: potential employee targeting and attraction, recruitment and induction, job design and evaluation, reward and recognition, performance management, staff development and planning, employee career transition and focus group facilitation.

Caroline has successfully managed large-scale change management, career mentoring, outsourced HR and recruitment programs. During this period she was a principal of Martin & van Til, a boutique human resources consultancy, whose key clients included RACV, Salmat and Spotless. She then joined Reddin Consulting Group, initially as the Team Leader of Executive Recruitment and was shortly then promoted to Victorian State Manager, responsible for 45 staff with carriage for a multi-disciplinarian HR practice, generating $20 million annually. Caroline was subsequently promoted to National Business Development Manager, spear-heading the winning and retention of several key contracted accounts including Arnott's, GE Capital Finance, Ericsson and Mobil.

Caroline van Til is the Principal of IxP3's Human Capital Division and is responsible for all generalist recruitment service lines, career & life management and HR Consultancy across the business. Drawing on her previous experience in human capital measurement, Caroline has carriage for IxP3's recently launched automated performance management solution.

Caroline has 12 years of consulting experience and has worked across all industry sectors and business types.

Abstract :   Aligning Business Team and Individual Objectives Through Automated Performance Management by Caroline van Til

Most organisations use some type of strategic planning to identify objectives or key business initiatives. Research and experience reiterate that many organizations struggle to link their strategic plan, to team and individual objectives and key performance indicators. This lack of integration or alignment between the 'big picture', team and individual, results in business goals and aspirations not being achieved. The workforce becomes demotivated and disengaged due to their lack of effective contribution. Overall the business struggles to defend their core business and to drive concurrent growth – that is, the business model becomes unsustainable.

The key to linking the vision to team and individual objectives and key performance indicators is the installation of a ''strategic management system'. A 'strategic management system' essentially integrates processes for planning, deployment & implementation.

The stages involved in developing a 'strategic management system' are; 1)define the balanced control panel, 2)link the vision to the job and employees, and 3)install a PDSA control system. To maximise the ROI derived out of the development and installation of a 'strategic management system', other underpinning factors need to be in place ranging from; an appropriate change / business model, through to a purpose build communication and capability programs that are geared to equip Managers and employees with the right 'performance language and 'cultural imprint' plus capabilities to drive the system – real time.

Recent developments in the e-HR space mean now that organizations can gain access to smart, cost effective software applications that can be used to build 'strategic management systems' that actually work! This is in stark contrast to the current status quo which sees significant headcount deployed in organizations to manage largely paper based strategic planning systems.

This presentation will provide the conference delegate with:

- A clear understanding of the 'strategic management system' concept
- Tips on how to link 'the big picture' with the Team and Individual, including how to engendered high levels of employee commitment and ownership
- A detailed overview of the stages that need to be completed to install a 'strategic management system' that works.
- An overview and demonstration of some of the new e-HR tools that can be used to build and drive a 'strategic management system' so that valuable resources can be deployed to other value add activities that will result in better ROI for the business.

Overall, the style of presentation will be interactive and 'action learning' based where possible so that delegates walk away with 'learnings' that can be employed back in their workplace.

RETURN TO INDEX