

## MY FINAL PROJECT

### *Though hopefully not my ‘Last Post!’*<sup>1</sup>

Dr. Kenneth F. Smith, PMP



After signing the U.S. Constitution in 1789, Benjamin Franklin expressed concern for its longevity saying “. . . *in this world, nothing can be said to be certain except **death** and **taxes!***”

I can’t offer you any comfort dealing with the latter ordeal. However, while anticipating the former inevitability I thought – *as a case example* -- my “**Pass On Project**” plan example might be instructive to help you alleviate some of the subsequent pain and suffering of your survivors.

While of advancing age – *I celebrated my 90<sup>th</sup> birthday last December* – I am still relatively healthy, mentally & physically active; as well as possessing an optimistic disposition – despite the volatile political, social & economic climate in the world around me. Nevertheless, I was severely shaken emotionally last year when – *without warning* -- an otherwise healthy acquaintance<sup>2</sup> some twenty years my junior suddenly died of cardiac arrest.<sup>3</sup>

Fortunately, our church was experienced dealing with deaths in the congregation -- *from the hospital, death certification, cremation, and religious memorial service perspectives* -- and Father Bert (our assistant rector) readily assumed the leadership role; assisting Peter’s stunned spouse Jenny<sup>4</sup> through the immediate stages of the ensuing ordeal. But – *on the periphery* -- what affected me even more than Peter’s death was the impact it must have had during the immediate aftermath on his ‘shell-shocked’ spouse to manage their *personal affairs* for her continuing existence.

Without being morbid, I empathized my spouse -- *totally unprepared* – having to face a similar situation. Sure, I had already done the ‘usual’ recommended legal minimum -- *i.e. preparing a will and identifying beneficiaries, as well as appointing an executor for my estate*. But now I realized that was not enough. I immediately contacted the church to discuss what would be involved in my case, and *pre-paid* them for their eventual activities. But I still needed to take additional steps to mitigate my spouse’s concerns & problems processing our personal affairs.

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<sup>2</sup> Jan Peter Wallum, Swedish. Retired Senior Economist of the Asian Development Bank (ADB) in Metro Manila.

<sup>3</sup> Although his demise correlated with a covid vaccination, causation was unresolved.

<sup>4</sup> Jennifer Wallum, MBE. British.

Over the next few days, random thoughts regarding activities, entities, and outcomes essential for my spouse’s coping, transition, and sustainability kept crowding into my head. Eventually, I brainstormed, recorded, & organized my ideas in terms of our unique situation;<sup>5</sup> then slept on it. When I awoke, I added a few more items induced from my sleep, and reworked the list. I then discussed the list with my spouse; and prepared some more-detailed documents to support them.

Much later – over the Christmas and New Year holidays -- I visited my daughter and son in the U.S., and while there, discussed my draft with them as my designated executors. Finally – almost a year after Peter’s passing, I followed up with Fr. Bert and Jenny for any additional inputs. After constructive feedback from everyone, I finalized my detailed checklist of **40 discrete ‘To Do’ activities**, organized in **27 subsets** of a **six (6) category Work Breakdown Structure (WBS) for my spouse &/or executor to implement, monitor and follow-up; plus a couple of additional immediate actions for myself.**

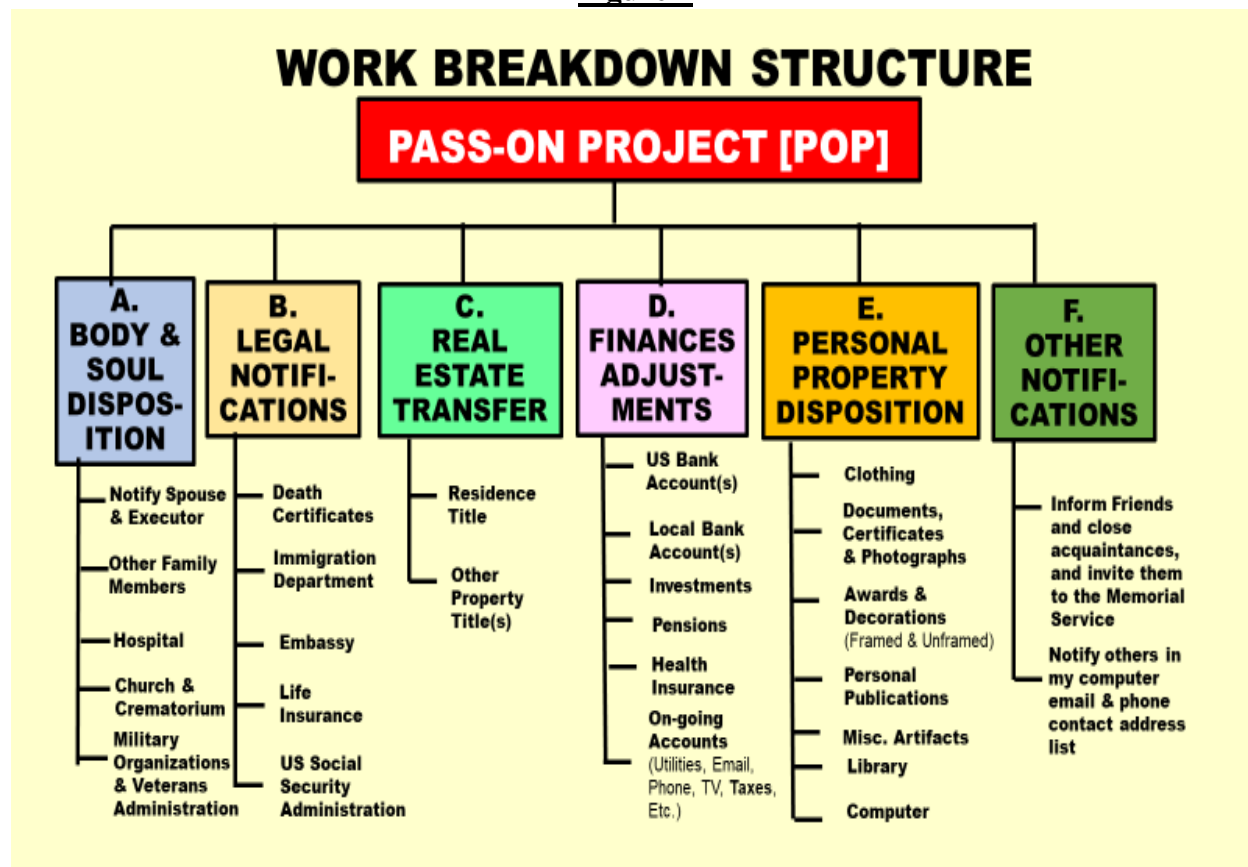
**Every individual’s situation is unique.** However, I subsequently thought a generic synopsis of my high-level summary **Work Breakdown Structure** (in Figure 1), plus a related **punch-list**<sup>6</sup> of activities and events to initiate and monitor, might also be helpful as a guide for others who have not yet planned their ‘Last Post.’

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<sup>5</sup> I’m a U.S. Citizen with a Filipina spouse, and permanently residing in the Philippines. I retired after a dual career with the US State Department’s Agency for International Development (USAID), and the US Defense Department (US Air Force). Consequently, my spouse and executor – *who is my eldest daughter in the US* -- will have to deal with the US Embassy and Philippine national and local government agencies here, as well as several US government agencies and private institutions in the US.

<sup>6</sup> A punch list is a construction management tool used to ensure that the terms of the contract have been met, and they are typically created during a punch list walkthrough of the almost-complete job site. This walkthrough allows all parties to observe and note anything that is missing or needs attention. [www.projectmanager.com/blog/guide-to-punch-lists](http://www.projectmanager.com/blog/guide-to-punch-lists).

Figure 1



Activities for each of the six category ‘Outcomes’ were essentially as follows:

**A. BODY & SOUL**

1. **Notify Spouse & Executor:** Initially I had assumed I would pass away at home, or at least in the presence of my spouse; but this was quickly dismissed as fallacious thinking! So -- together with the hearing aid batteries, a packet of 4 aspirins and instructions for administering them in the event of apparent stroke or heart attack, and a small crucifix – all of which I had been carrying for several years from prior risk assessment & mitigation -- an *immediate activity for me* was to prepare and carry another **emergency notification card** in my breast pocket: a card with my name & home address, and instructions on the reverse for anyone who found me to notify 1) the church, 2) my spouse and 3) my executor -- *redundancy theory* -- by the phone numbers and emails provided.
2. **Other Family Members:** My executor (my eldest daughter) could then notify the rest of my family – by *relay communication*. [Compounding my situation, the rest of my family are living at various places in the US and elsewhere.]

3. **Hospital, & Death Certification: Assumption:** If I have a heart attack, or stroke, or will pass away in the local area, my spouse can contact our condo security office to arrange for my transportation to a funeral home, or hospital. **Risk Workaround:** Otherwise, she will have to find out where I was sent, and act accordingly. [Note: many hospitals – *at least in the Philippines* -- do not have a mortuary facility. Furthermore, **If already deceased**, there is *no need to be transported to a hospital*, but the body **should be sent directly to a funeral home**, where they can arrange for the death certification, and other services, such as liaison with their Embassy for expats. **Father Bert emphasized the importance of complying with local deadlines for death certificate registration. Notification even later than 24 hours after death could result in processing through the court system, further delaying issuance by several weeks. Moreover, official identification cards of both the deceased and the spouse (or individual seeking the registration) are required in order to file a registration request. NOTE: It is essential to check the spelling -- by the registrar -- of all names is **correct!** [Registrars are unfamiliar with the deceased, and frequently make errors – particularly with foreigners names;<sup>7</sup> while the spouse is usually in an emotionally distraught state, and glosses over details in the documents. Furthermore, the spelling of names of all legal identification documents presented for the deceased -- and reporting party -- must have the exact same wording of their names (including middle names), and -- for foreigners -- in accordance with their passports.<sup>8</sup> Otherwise, the registrar will refuse to process further, and refer you to the courts for a determination before a death certificate can be issued. Since obtaining **the death certificate is a predecessor to subsequent activities**, check again that the spelling of names is **correct** or get it rectified before proceeding further!**
4. **Church, Instructions for Funeral or Crematorium:** The spouse should contact the church to reaffirm arrangements for cremation, and the subsequent memorial service. Instructions for cremation should include whether to cremate immediately, or prepare for viewing and keep refrigerated for future viewing prior to cremation. Furthermore, funeral scheduling must be coordinated with the City Hall authorities. [Note: To relieve the stress

<sup>7</sup> Despite my surname SMITH -- which abounds in the US & UK -- whilst abroad, I have frequently encountered being written up as SMIT, SCHMIT, SCHMITT, SMIS, and even SMISS; while KENNETH comes out as TENNIS, KENNITH, KENITH, or KENIF. Furthermore, in processing for my Philippine retirement visa, despite the name in my US passport **Kenneth Frank Smith**, the Philippine National Bureau of Investigation (NBI) insisted my **First Name** had to be recorded as **Kenneth Frank**, and I had **NO MIDDLE NAME** – *which in their culture is customarily the mother's maiden name*. So be it! *Bureaucracy uber alles!*

<sup>8</sup> Jenny said it was *six years* before an expat friend in a similar deceased-spouse situation was able to receive a **special resident retirement visa** here -- *due to a spelling error in one of the identification documents*.

on my spouse, *I pre-arranged* with, *and prepaid the church* to take the lead in providing and organizing these services; while coordinating with my spouse and the US Embassy.]

- 5. Military Organizations & Veterans Administration:** My executor would contact the **Air Force** and several related organizations (*i.e. Air Force Association, Reserve Officers Association, American Legion, Veterans of Foreign Wars, Vietnam Veterans, The Good Guys*), as well as the VA to notify them and make any further arrangements for registration. Also, the **State Department's American Foreign Service Association** and **USAID Alumni Association**.

## B. LEGAL NOTIFICATIONS

- 1. Death Certificates:** I learned that not just one, but *multiple* death certificates would be required from city hall to satisfy the requirements of various entities. [NOTE: Some will want *originals*; others will accept certified copies. In the Philippines, up to **three (3) original** certificates can be issued. Additional copies can be obtained, but must be notarized as True Copies.]
- 2.** Moreover, as a resident expat, my death certificates for several U.S. entities were also required to be '**apostilled**'<sup>9</sup> by the Philippine National government.
- 3. Immigration Department:** The Bureau of Immigration needed to be informed this '*ancient alien*' did not depart in a UFO or mysteriously morph into an *illegal* alien, but merely expired before his visa!
- 4. Embassy:** As an expat, my Embassy also needed to be informed. If a body is to be shipped (flown) to another country, additional permission may be required from both the 'exporting' and 'importing' national country governments.
- 5. Life Insurance:** Any life insurance companies need to be informed in order for them to pay benefits.
- 6. U.S. Social Security Administration:** As an annuitant, the SSA needed to be informed

## C. REAL ESTATE TRANSFER

- 1. Residence Title:** Re-register the title of our condo from Joint Ownership, to my spouse, alone. [We had already purchased the condo, so no mortgage remained; *only taxes!*]

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<sup>9</sup> An apostille is an international official certification from a government comparable to a notarization, that makes a document from one country acceptable in another.

2. **Other Property Title(s):** Title(s) of other Real property were registered to my spouse.

#### D. FINANCIAL ADJUSTMENTS

1. **U.S. Bank Accounts:** Notify the bank(s) of my passing, and instruct them to transfer the remaining funds in my accounts to my estate, and close the account(s). [**Note:** it is important for the spouse to have a *separate* bank account, as the funds in any Joint accounts are frozen until estate settlement, so would be inaccessible after notification.<sup>10</sup>]
2. **Local Bank Accounts:** Notify the bank of my passing, and instruct them to transfer the remaining funds in my account to my Spouse's local bank account. [*Different rules.*]
3. **Investments:** Notify the manager of my financial investments of my passing, and instruct them to transfer the remaining funds to the beneficiaries.
4. **Pensions:** Notify the pension-paying institutions of my passing, and instruct them to initiate reduced survivor benefit pension payments to my spouse in her US bank account. [**Note:** This process could take several months, so it is important to accumulate readily-available savings in her account **now** to compensate for the loss of immediate cash flow from pension payments during the interim, as well as soften the impact of reduced monthly income thereafter.]
5. **Health Insurance:** 1) Notify the Health Insurance Provider (HIP) of my passing; 2) submit expenses from the hospital and medical service providers; and 3) instruct the HIP to continue health insurance coverage for my spouse.
6. **On-Going Accounts:** In addition to the foregoing, we have several on-going expense accounts for condo maintenance, utilities, TV, phone, email, etc., with service providers as well as **income taxes**. [**Note:** In the past, I managed the household budget and payment of all expenses. This is currently in transition -- *including account titling in some cases* -- and my spouse is assuming these responsibilities.]

**Almost all the foregoing necessitated my preparing draft letters ahead of time** – *complete with detailed account numbers, physical mailing locations, on-line sites and email addresses, phone numbers etc.* -- for my spouse &/or executor to subsequently copy, fill-in-the-blanks, and issue, or recreate. This entailed extensive time-consuming research. I was alerted that in addition to initial notification, unavoidably, US government entities will subsequently require their unique forms be

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<sup>10</sup> Jenny told me that after many months she is *still waiting* for her **bank to release funds** from their joint account.



completed, certified, and provided apostilled death certificates. Since we are 'overseas' this will require considerable time, cost, and effort in the future for **express** mailing, as well as international phone follow-up, because regular postal mail takes about two months for international delivery!

## E. PERSONAL PROPERTY DISPOSITION


1. **Clothing:** A relatively easy task; my spouse can decide how to dispose of my clothing.
2. **Documents, Certificates & Photographs:** More complex for my spouse and executor, over a lifetime I accumulated numerous official and unofficial documents, certificates and photographs in various forms. Who needs or would want to retain 'what;' and decide the items to dispose of as no longer required, or wanted, remains to be seen.
3. **Awards & Decorations:** During my careers in the Military and Foreign service, and subsequent international consultancies, I received tokens from various organizations in recognition for my services, ranging from formal national government medals to unique institutional plaques. I treasure and display some of these prominently on my '*wall of fame*,' but again don't know which – *if any* – my family would be interested in retaining for display (or even storage '*in the attic*' for future generations), donating to institutions or otherwise disposing of.
4. **Personal Publications:** In consonance with the ethic that '*it is better to give than to receive*,' throughout my career – *and beyond* – I prepared a wide variety of materials (mostly on Project Management & Evaluation) in different forms -- *published books and articles, training manuals, reports and studies, unpublished power-point presentations & technical templates; as well as an autobiography, and a diplomatic oral history*. **These are my legacy.** Please ensure they are retained by someone in the family, &/or donated to an appropriate institution for *the benefit of current & future generations*.
5. **Miscellaneous Artifacts:** During my work and international travels, I also accumulated several unique artifacts and memorabilia – some work related, others merely curios. Again, their disposition remains to be determined.
6. **Library:** When I moved from Honolulu to Manila, I donated most of my book collection to the *Kamehameha Schools* on Oahu, and only retained a minimal number. Since then, I've acquired a few more books. These also need to be disposed of on my demise.
7. **Computer:** My computer and related storage units contain a significant amount of work-related training materials, current personal contacts, correspondence, activities, other items of interest, and photographs. As with the personal publications, who gets the computer, and what to do with the contents remains to be decided.

**F. OTHER NOTIFICATIONS**

1. **Inform Friends and close acquaintances and invite them to the Memorial Service.**  
Someone should do this, *early in the process*, in coordination with the Church.
2. **Notify others in my computer email and phone contact list:** No rush. Someone should do this, eventually.

As can be seen from the foregoing, even this ‘short-list’ is a formidable administrative burden for anyone; more so for someone under emotional stress. I designed a ‘punch-list’ – such as the truncated one illustrated in **Figure 2** – to facilitate monitoring and follow-up.

Figure 2

PASS-ON PROJECT [POP]								
ON MY DEATH & TRANSITION FOR MY SPOUSE'S SUSTAINABILITY								
My Last Project Plan, for Others to Implement								
On my death, numerous activities need to be undertaken -- <i>legal and otherwise</i> -- to transfer continuing elements to Katrinabel. As my Executor, Carolyn is responsible for some things, but Katrina will also need to take many independent actions, with Carolyn's help, <i>if necessary</i> . This document is a guide -- <i>to the best of my knowledge</i> -- to assist in that process.								
Work Breakdown	A. BODY & SOUL	B. LEGAL NOTIFICATIONS	C. PHIL REAL ESTATE TRANSFER	D. FINANCE	E. PERSONAL PROPERTY	F. OTHER NOTIFICATIONS		
Number	Start	Complete	Death Cert Required	Apostille Required	Attached file?	RESPONSIBLE	Activities	NOTES: Detailed sample letters are in separate files
A1a							Notify My Spouse of my death	[Details deleted for privacy reasons]
A1b							Notify Carolyn (My Eldest Daughter & Executor) of my	
A1c							Notify Rockwell Security of my death	They will arrange transport to Makati Medical Center hospital &/or call Doctor to certify death.
B2							Obtain Death Certification from Doctor	Advise MMC you want the Church of Holy Trinity to arrange for cremation
B3		*	*				Obtain multiple copies of Death Certificate from Makati City Hall - Estimate 20 Certs : 11 with Apostilles	You will need copies of death certificate for many actions, plus Apostille for any US Activities

Etc., etc. . . .

A punch list with ‘Start’ and ‘Complete’ checkmarks for each activity is adequate to monitor and follow-up progress; but these activities are merely listed *without regard to their sequence* for implementation. Also, many activities will first need a death certificate before proceeding, after



which some can be initiated concurrently. However, occasionally, subsequent activities will be stalled in a ‘wait & hurry up’ status awaiting other prior activity completions before being able to continue, while others will linger interminably, simply from bureaucratic inertia.

To clarify this sequential ‘roadmap’<sup>11</sup> I wrote each activity on a separate ‘post-it’ note and arranged them in sequence, preparatory to developing a **Critical Path Precedence Network** diagram. I then transcribed these activities -- with their *Start & Complete* ‘Milestones’ – to a **Project Libre** software file.<sup>12</sup> A portion is illustrated in Figure 3.

**Figure 3**

**DATA ENTRY FOR CREATING CRITICAL PATH PRECEDENCE NETWORK**

	Name	Text1	Duration	Predecessors
1	START MILESTONE (MS)	ST	0 days	
2	MS A1 S	A1 S	0 days	1
3	Notify Rockwell Security & Carolyn	A1	1 day	2
4	MS A1 C	A1 C	0 days	3
5	MS B2 S	B2 S	0 days	4
6	Obtain Death Cert from Doctor	B2	2 days	5
7	MS B2 C	B2 C	0 days	6
8	MS B3 S	B3 S	0 days	7
9	Obtain Multiple Copies of Death Cert	B3	2 days	8
10	MS B3 C	B3 C	0 days	9
11	MS A4 S	A4 S	0 days	10
12	Notify Church of Death	A4	1 day	4
13	MS A4 C	A4 C	0 days	10; 11; 12
14	MS A5 S	A5 S	0 days	12
15	Advise Church I want cremation	A5	1 day?	14
16	MS A5 C	A5 C	0 days	10; 12; 15
17	MS A6 S	A6 S	0 days	16
18	Arrange for Memorial Service	A6	1 day?	17
19	MS A6 C	A6 C	0 days	18
20	MS A7 S	A7 S	0 days	19
21	Collect Ashes	A7	1 day	20
22	MS A7 C	A7 C	0 days	21
23	MS B8 S	B8 S	0 days	10
24	Notify Phil Retirement Authority	B8	1 day	23
25	MS B8 C	B8 C	0 days	24
26	MS B9 S	B9 S	0 days	10
27	Notify US Embassy	B9	1 day	26
28	MS B9 C	B9 C	0 days	27
29	MS C10 S	C10 S	0 days	10
30	Contact Makati City Hall Transfer Condo Title	C10	1 day	29
31	MS C10 C	C10 C	0 days	30
32	MS D11 S	D11 S	0 days	10

Etc., etc. . . .

<sup>11</sup> Primarily for my own clarification, if not subsequent usage by others unschooled in Critical Path monitoring

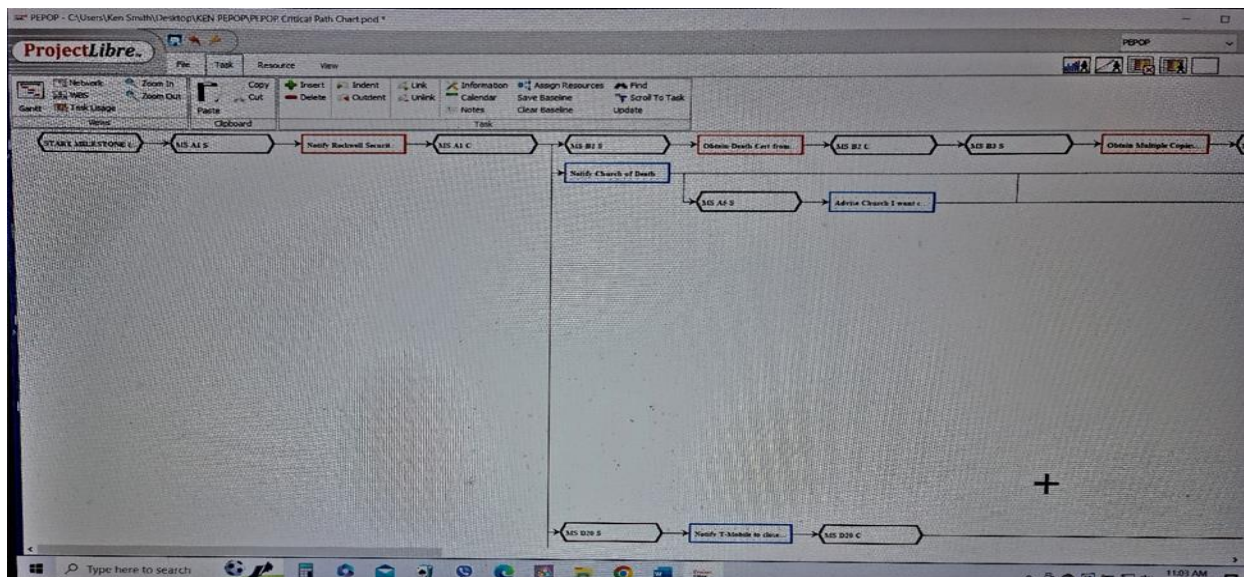
<sup>12</sup> A free open-source project management scheduling software that emulates some of the key features of MS Project. [projectlibre.en.softonic.com/download](http://projectlibre.en.softonic.com/download)

**NOTES:**

1. **Start and Complete Milestones of Activities are checkpoints, so their duration is ‘0.’**
2. **Durations for all Activities are indefinite** as well as uncontrollable. Although their durations are identified in my chart as **one or two days, these are obviously unrealistic!** However, they are *adequate for this purpose* as the duration is simply a work-around to facilitate drawing bars, and to distinguish Activities from Milestones.
3. **Note: Predecessor milestones and activities in this software are identified by their row numbers.**

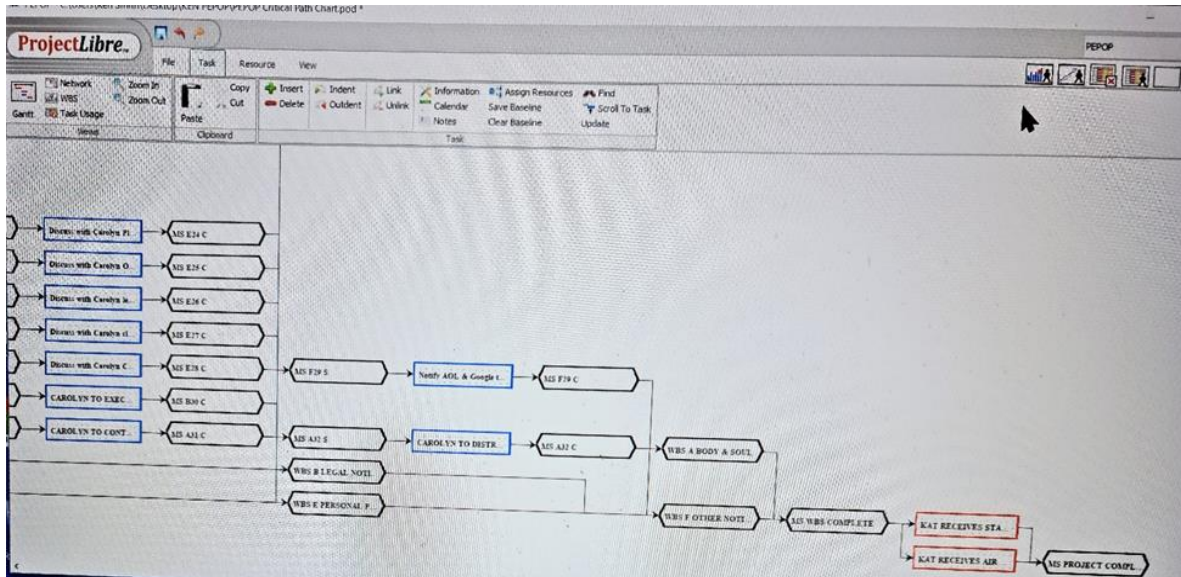
By selecting and clicking on ‘Task’ in the Project Libre heading; then ‘Network’ and “Zoom Out;’ a sequential diagram is displayed -- as illustrated in Figures 4 & 5 -- showing activity ‘predecessor – successor’ relationships, with ‘merge’ and ‘burst’ milestones; although they cannot be scheduled, nor a Critical Path computed – as is done in a typical project.

**Figure 4**  
**START OF PRECEDENCE NETWORK CHART**



**NOTE: Many other Activities [rectangles] and Milestones [extended hexagonals] follow, showing their predecessor and successor relationship sequence**

**Figure 5**  
**END OF PRECEDENCE NETWORK CHART**



Monitoring and checking the **actual activity ‘start’ and ‘complete’ milestone boxes** in the Figure 2 **punch-list columns should be sufficient to record progress; as well as highlight the need to follow-up on lagging activities, until all have been completed.**<sup>13</sup> However, a **Critical Path Precedence Network facilitates visual monitoring.**

Unfortunately, although this ordeal should be **completed as soon as possible, realistic targets and precise schedules of all the requisite activities cannot be set a priori; and even if they are, you will be sorely disappointed by schedule slippages.** The requirements are numerous; the process is tortuous, and the pace of indifferent (or deliberately obtuse?) bureaucracy – **over which we have no control** – is never as speedy as we would desire.

Two examples that just came to my attention illustrate this – one apocryphal; the other corroborating it.

<sup>13</sup> For project management purists -- and pedants -- interested in **quantitative performance progress monitoring and reporting, the project status as a percentage of completion** can be determined as follows:

$$\% \text{ of Completion} = \frac{(\# \text{ start} + \# \text{ complete milestones actually completed})}{\text{total milestones in the project}} \times 100$$



Just before completing this article, I read one by Francis Kong<sup>14</sup> entitled **Cancel Those Credit Cards** -- a story he obtained from another source – that aptly illustrates the situation; as follows:

My aunt died this past January. This bank billed her for February and March for their monthly service charge on her credit card and then added late fees and interest on the monthly charge; the balance had been \$0.00. Now it is somewhere around \$60.00.

I placed the following phone call to the bank:

Me: "I am calling to tell you that she died in January."

Bank: "The account was never closed, and the late charges still apply."

Me: "You should turn it over to collections!"

Bank: "Since it is two months past due, it already has been."

Me: "So, what will they do when they find out she is dead?"

Bank: "Either report her account to the frauds division or report her to the credit bureau...maybe both!"

Me: "Do you think God will be mad at her?"

Bank: "...excuse me?"

Me: "Did you just get what I was telling you... the part about her being dead?"

Bank: "Sir, you'll have to speak to my supervisor!"

Me: "I'm calling to tell you she died in January."

**Supervisor:** "The account was never closed, and the late charges still apply."

Me: "You mean you want to collect from her estate?"

Bank: "Are you her lawyer?"

Me: "No, I'm her great-nephew."

Bank: "Could you fax us a certificate of death?"

Me: "Sure." (**After they get the fax**)

**Bank:** "Our system just isn't set up for death. I don't know what more I can do to help."

Me: "Well... if you figure it out, great! If not, you could keep billing her. I don't think she will care!"

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<sup>14</sup> An eminent Filipino lecturer and writer on leadership and better business management practices; and a regular contributor to the Philippine Star newspaper.

Bank: “The late fees and charges do still apply.”

Me: “Would you like her new billing address?”

Bank: “That might help.”

Me: “Odessa Memorial Cemetery, Hwy 129, and plot number given.”

Bank: “Sir, that’s a cemetery!”

Me: “What do you do with dead people on YOUR planet?!!”

Bank hung up!!!

**Whether or not that incident was true**, when I told my daughter about it, *she corroborated the verity of the scenario!* She informed me she went ‘round and round’ with the phone company trying to cancel her father-in-law’s cell phone account 22 years ago, after he passed away. However, they wouldn’t talk to anyone who was not on the account, *nor allow anyone else to cancel it!* So, since he was the only one on the account, **they kept billing!** She said it took about 3 months to clear up -- after getting bumped ever higher up the supervisory management chain, until they finally accepted a death certificate. Even then, she still had to pay for the time period up to cancellation, even though it was clear the phone had not been used.

**Despite this exposition of the myriad activities to consider in pre-planning your final departure, I’m fully aware not everyone is in a position to prepay anything.** Indeed, **many are strapped to cover current living costs**; let alone ever rising costs; as well as pre-pay &/or lay away funds for future needs in anticipation of the spectre of eventual cash flow curtailment. More so for those with chronic ill-health already saddled with or facing additional costs caring for themselves as well as aging relatives &/or others – either at home, in assisted-living facilities, or confined in medical facilities or other institutions for treatment. **Addressing those needs to stay alive -- indisputably IMO – is a higher priority than pre-paying your trip ticket. This is a societal issue worthy of a separate study for solution.**

**Nevertheless, forewarned is forearmed**, and I hope utilizing the project management tools and techniques outlined herein will ease -- somewhat -- the burden of putting **you** to **Rest in Peace**, so that – *despite death and taxes* -- **your surviving loved ones** will be enabled to “*Carry On!*”

## About the Author



### **Dr. Kenneth Smith**

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Initially a US Civil Service Management Intern, then a management analyst & systems specialist with the US Defense Department, Ken subsequently had a career as a senior foreign service officer -- management & evaluation specialist, project manager, and in-house facilitator/trainer -- with the US Agency for International Development (USAID). Ken assisted host country governments in many countries to plan, monitor and evaluate projects in various technical sectors; working 'hands-on' with their officers as well as other USAID personnel, contractors and NGOs. Intermittently, he was also a team leader &/or team member to conduct project, program & and country-level portfolio analyses and evaluations.

Concurrently, Ken had an active dual career as Air Force ready-reservist in Asia (Japan, Korea, Vietnam, Indonesia, Philippines) as well as the Washington D.C. area; was Chairman of a Congressional Services Academy Advisory Board (SAAB); and had additional duties as an Air Force Academy Liaison Officer. He retired as a 'bird' colonel.

After retirement from USAID, Ken was a project management consultant for ADB, the World Bank, UNDP and USAID.

He earned his DPA (Doctor of Public Administration) from the George Mason University (GMU) in Virginia, his MS from Massachusetts Institute of Technology (MIT Systems Analysis Fellow, Center for Advanced Engineering Study), and BA & MA degrees in Government & International Relations from the University of Connecticut (UCONN). A long-time member of the Project Management Institute (PMI) and IPMA-USA, Ken is a Certified Project Management Professional (PMP®) and a member of the PMI®-Honolulu and Philippines Chapters.

Ken's book -- **Project Management PRAXIS** (available from Amazon) -- includes many innovative project management tools & techniques; and describes a "**Toolkit**" of related templates available directly from him at [kenfsmith@aol.com](mailto:kenfsmith@aol.com) on proof of purchase of PRAXIS.