



WILLIAM S. BATES CURRICULUM VITAE

EDUCATION MA, Technology of Management, The American University, 1969
BSc, University of Maryland, 1964

CITIZENSHIP U.S. Citizen with landed immigrant status in Canada.

SUMMARY OF BACKGROUND

People and objectives oriented, over forty-eight years of progressive management and leadership experience with a consistent record of positive results. Firm grasp of portfolio, program and project management with strong emphasis on planning and objectives control. An organizer of new ventures based on sound financial, marketing and organizational planning. Has performed at the chairman/president/vice-president level of corporate responsibility for over thirty years. Has worked as a senior executive level consultant in project management for over twenty-nine years. Versatile, quick to grasp new operations and environments. Highly skilled in written and oral communications. Thorough management information systems background.

EMPLOYMENT HISTORY

1991 – Current: President and CEO of Bates Project Management Inc.

1987 to 1990: Chairman and President of Projetronics Inc.

1974 To 1986: President of MMS/BATES, Inc. of Ottawa and Multinational Management Systems, Ltd. of Springfield, Virginia.

1973 to 1974: Vice-President, Information Systems, Controlled Environment Systems, Inc. of Rockville, Maryland.

1972 to 1973: President of International Data Systems Corporation of Washington, D.C.

1952 to 1972: Service in the U.S. Marine Corps through rank of Major.

SPECIFIC EXPERIENCES

PROJECT MANAGEMENT CONSULTING

Over twenty-nine years direct experience in project management consulting. The following are examples of project areas involved.

Direct Consulting

Was principal-in-charge of:

- projects to establish PMOs at Aliant Telecom and its subsidiary, Innovatia Inc.
- a project to establish and operate a PMO at Reuters Canada Information Services
- two Year 2000 Projects for Reuters Information Services and Rogers Cantel.
- a project to install Bates PMM at the TinPlate Mill of Dofasco Inc and provide project planning facilitation
- a BPMM team implementing project management methodology for a division of Xerox Canada.
- a BPMM team involved in implementing project management methodology and managing a key project for The Toronto Stock Exchange across a eighteen month period.

Led team of four BPMM consultants in assessing project/program management environment and then customizing and implementing program/project management methodology at deHAVILLAND, INC. over a nine month period.

Conducted and led studies to evaluate project organizational needs, project procedures and information systems needs for various organizations including banks, transportation companies, federal government, telecommunication companies, energy companies and provincial governments.

Development of Project Management Methodology and Procedure

Was architect and leader in the development of a standard project management methodology used for project selection, single and multi-project planning, monitoring and reporting. That methodology has then been licensed to and customized for Canada Post, Texaco Canada, Imperial Oil, Canadian Imperial Bank of Commerce, Bank of Montreal, Crown Life Insurance, CoOperators Insurance, Canadian Astronautics Ltd., Texaco Canada, Canadian National Rail, MOSAID Technologies, The Toronto Stock Exchange, Xerox Canada, National Archives of Canada, the federal departments of Justice, Health and Welfare and Customs and Excise.

Developed and delivered a manual multi-project scheduling and resource analysis system for a \$30 million per year construction company.

Project Planning and Control Assistance

Led a planning team of thirteen planners and project control office staff to launch planning for the Canadian Firearms Program. This five year program has 34 projects ranging from information systems development to the development and implementation of law and government regulation required to support the law to the training of over 75,000 law enforcement personnel across Canada. The budget exceeds \$375 million. The program involves 5 federal government departments and all of the provinces and territories of Canada. The planning followed the Bates Project Management Methodology. Concurrently established the project control office using Artemis project management software, Lotus Notes and the Microsoft Office suite of software implementing the program plan, issues management and change control.

Acted as planning facilitator and consultant for the planning of the move of the Revenue Canada GST Processing Centre from Ottawa to Prince Edward Island. Helped to specify and organize the project office and set up of the monitoring and reporting system.

Led the program planning for a major information systems program valued at \$100 million for Air Canada. This multi-project program involved four development teams in four different companies and three different user teams. As part of this assignment, the plan was captured using ViewPoint Project Management software by a team under my supervision. Also established the project control operation for the project.

Assisted in the program and project planning in major facilities and accommodation undertakings for the Ministry of Revenue of Ontario, The National Archives of Canada, and the Departments of Justice and Communication of the Canadian federal government.

Assisted in the preliminary project planning for a major natural gas storage facility, the development of an airship industry and for a charitable lottery.

Acted as project planning advisor to Ministries of Revenue, Education and Community and Social Services of the Ontario Government and the National Urban League of New York City.

Project Rescue

Reporting to the Board of Directors, assisted a high technology company developing a major cable television service in recovering a \$15,000,000 project through training, project planning and reorganization.

PROJECT MANAGEMENT INSTRUCTION

Conducted over 700 seminars in the subject of project management in-house, publicly and internationally for commercial and government organizations. Primary project needs for clients using seminars included engineering and construction, data systems, aerospace, accommodation and facilities management, telecommunications, social services, advertising and public relations, human resources, banking, transportation, manufacturing, energy and high technology.

FINANCIAL MANAGEMENT

Has provided overall financial planning and management for his own businesses since 1971 to include budgets, cash flow projections and obtaining of investment capital and bank credit lines as necessary. Was controller of a military base for two years with an operating budget, less military salaries, of \$2 million and property management of over \$20 million in value. Constant direct involvement in financial planning and execution for over thirty years.

DATA SYSTEMS

Consulted and taught Data and Information Systems Development and Project Management for utility companies, banks, insurance companies and various government departments. Developed a teleprocessing based text-editing system. Managed a major military technical data systems training program. Directly managed a medium sized main frame computer operations centre.

MARKETING

Conducted or supervised all major marketing activities for my several firms since 1972, to include the preparation of proposals and negotiation of contracts to commercial, industrial companies and government organizations.

PUBLIC RELATIONS

Managed a staff and operations involving over 150 persons charged with changing the attitudes of a population of over 4 million people, civilian and military, in a region of Vietnam. Planned and executed projects, some with budgets exceeding \$20 million using all mass media-types. Developed and operated a measurement system to track results.

LEADERSHIP

Besides the assembly and leadership of associates, partners and project teams in various business endeavours over the past decade, he has led and commanded military units to 1100 persons. Recognized leadership qualities advanced him from private to major during military service.

INSTRUCTION

Conducted over 700 professional seminars in the past twenty-seven years in project management and information systems. Served as an adjunct lecturer in the MBA for Executives Program of the University of New Haven. Developed, implemented and managed for four years a BS degree curriculum in Data Processing Management for Strayer College of Washington, D.C. under a services contract. Academic Head of the U.S. Marine Corps Computer Sciences School for two years. Was adjunct lecturer in the graduate program at the American University, Washington.

COMMUNICATIONS

Published several articles and tutorials and four booklets on project management and information systems during the past twenty eight years. Frequent speaker for professional associations meetings.

COMMUNITY/PROFESSIONAL

Is a past Chairman of the Board of Watercan, a Canadian non governmental organization providing clean water and sanitation projects in developing countries. Currently serves as Chairman of the Board of Governors of Robert Land Academy, a private boys military school, and previously served on Board of the Ottawa Chapter of the Project Management Institute. He is currently a member of the Research Member Advisory Group of the Project Management Institute and is a past member of the Project Management Forum of the Conference Board of Canada. Led the development of a community recreation centre involving a club house, swimming pool and tennis courts. Served as deacon and elder of local church for a number of years. Served as president of local chapter of a national data system professional group for one year. Is a member of the Project Management Institute.