

Integrated Program Management Division

Guide to Integrated Baseline Review (IBR)

January 28, 2015
Update Summary

Neil Albert

- **Why Update?**
- **Steering Committee and Chapter Leads**
- **Process Flow (Current vs. Updated)**
- **Guide Overview**
- **Approach**

Why Update?

- **Current IBR Guide (September 2010) at too high level to be effective**
- **Almost one-third the guide is focused on “Pre-Award” IBR**
- **Emphasis on overarching process and not on critical reasons for having an IBR**
- **Focus needs to be on executability of the program baseline and risk in accomplishing it**
- **Ensure this is not a system certification or surveillance review**

Steering Committee/Advisors

Name	Organization
Wayne Abba (A)	Abba Consulting
Neil Albert	MCR, LLC
Glen Alleman	Niwotridge
Ivan Bembers	NRO
William Chadick	MCR, LLC
Buddy Everage	MCR, LLC
Gary Humphreys (A)	Humphreys and Associates
Robert Loop	DoE
Linda Nobel	Raytheon
Debra McGinnis	SPAWAR

Chapter Authors

Chapter

References/Acronyms

Chapter 1 – Introduction

Chapter 2 - Initiation of the IBR Process
(Determining the reason for an IBR)

Chapter 3 - IBR Preparation – Identification of Key
Program Elements - Readiness Checkpoint 1
Elements

Chapter 4 - IBR Preparation – Confirmation of
Readiness for IBR - Readiness Checkpoint 2
Elements

Chapter 5 - Conduct the IBR

Chapter 6 - Post IBR Actions/Closure

Appendices

- A. History of the IBR
- B. Pre-award IBR process
- C. Program Level IBR Process

Leads (I)/(G)

MCR (I)

SM&A (I)/DOE (G)

Raytheon (I)/ SPAWAR (G)

Lockheed Martin (I)/ SPAWAR (G)

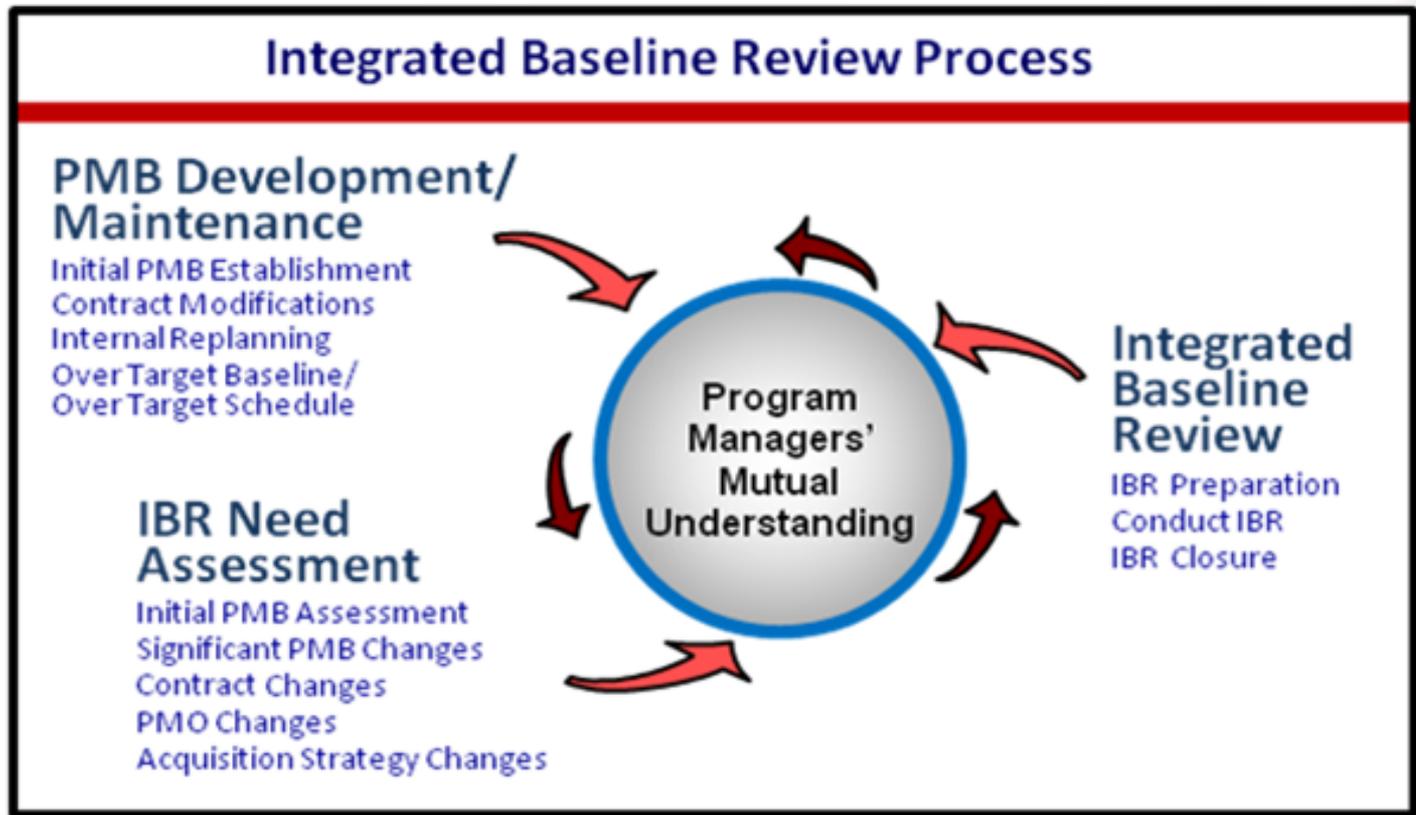
MCR (I)/ NAVAIR (G)

Raytheon (I)/NRO (G)

Abba Consulting (I)

MCR (I)/OMB (I)

MCR (I)/FAA (G)



Updated IBR Process Flow (2015)



1. Introduction

- **Purpose of the Guide**
- **Purpose of the IBR**
- **IBR Benefits**
- **IBR Process Flow**
 - IBR Initiating Event
 - IBR Preparation – Readiness Checkpoint 1
 - IBR Preparation – Readiness Checkpoint 2
- **IBR Event**
- **IBR Closure**

2. Initiation of the IBR Process

- **Pre-award IBR**
- **Post Award IBR - New Contract Award, New Program or Project**
- **Significant Follow-on Change Actions**
 - Baseline (PMB) Changes
 - Contract Execution Risk Changes
 - Acquisition Strategy Changes
 - Funding Profile Changes
 - Over Target Baseline (OTB)/Over Target Schedule (OTS)

- **Supplier IBR Readiness**
 - Supplier Artifacts
 - Supplier IBR Team
- **Customer IBR Readiness**
 - Customer Artifacts
 - Customer Team and IBR Preparation
- **Joint IBR Planning Activities**

4. IBR Preparation – Confirmation of Readiness - Checkpoint 2

- **Supplier Readiness**
 - PM and CAM Preparation
 - Supplier Team Training
 - Supplier IBR Team Finalization
- **Customer Readiness**
 - Planning Documentation and Artifact Review
 - Risk and Opportunity Review
 - Customer Team Training
 - Customer IBR Team Finalization
- **Joint Readiness**
 - Joint Training
 - IBR Scope and Coverage
 - Business Office Discussions

5. The IBR Event

- **IBR Introduction**
 - The In-brief and Welcome
 - Overview of the IBR
- **CAM Overview and Areas of Responsibility**
 - Technical Assessment
 - Schedule Assessment
 - Cost Assessment
 - Resource Assessment
 - Management Processes
 - Risks and Opportunities

- **Overview of IBR Closure Concept**
- **Customer Actions**
 - Issue Actions to the Supplier
 - Prepare the IBR Final Report
 - Ensure a Timely Response to “Action” Risks
- **Supplier Follow-up Actions**
- **Summary of the IBR closure effort**

Approach – Key Tenants

- **Critical part of the contract award and management process**
- **Purpose**
 - Evaluate Performance Measurement Baseline (PMB)
 - cover the entire technical scope of work
 - realistically and accurately scheduled
 - identify risks and opportunities, and their mitigation
 - accomplish contractual requirements with the amount and mix of resources identified
 - Not an audit or validation of a contractor's total system compliance with the EVMS Guidelines
- **Start process no later than contract award – why wait for 6 months?**
 - Guide - neither a how-to nor a step-by-step tool kit for conducting an IBR
 - Applicable agency instructions

- **Collaborative/Agreement (Customer/Supplier PMs)**
 - Early and ongoing communication
 - Discussion (not interviews)
 - Activities: Customer, Supplier, Joint
- **IBR Closure**
 - Mutual understanding of how to address these actions
 - Use the Supplier management processes implemented
 - Customer ongoing management processes (normal part of program activities)

Ensuring Good Integrated Program Management Processes