

NDIA IPMD SUMMER MEETING SESSION – AUGUST 28 - 29, 2018

Sponsor – Bell

Location: Hurst Convention Center, Hurst, TX

These notes are intended to supplement the charts shown during the presentations (as applicable). Please refer to the speaker's presentations for more details ([add link to NDIA Presentations](#))

DAY #1 – AUGUST 28

MEETING CALLED TO ORDER – Mr. Dale Gillam, Corporate EVMS and Scheduling Implementation Manager, Leidos, NDIA IPMD Chair

Mr. Dale Gillam called the meeting to order. Mr. Gillam thanked Bell who is our sponsor for the entire event. The meeting's agenda was discussed. As a tradition, we all took a moment of silence to remember why we are here; to support the warfighter. We then went around the room with introductions.

THE BELL FLIGHT OPERATIONS EXPERIENCE – Mr. Chris Seymour, Vice President, Flight Operations, Bell Helicopter Textron, Inc

Mr. Seymour started the presentation by asking the audience three questions. He answered these questions at the end of his presentation. 1) What were the problems with the V22? Answer: First flight was in 1989 so the fly-by-wire technology was using 1980's technology and there were a lot of mission ready requirements which slowed the program. It was agreed that there were too many requirements, so some were cancelled; 2) What are your thoughts on EVM? Answer: Mr. Seymour stated he has a bipolar view of EVM. As a taxpayer and warfighter, EVM slows down progress but EVMS shows the value in the work we planned and budgeted. Mr. Seymour understands why EVM is needed. He believes that the decisions were made based on EV data has slowed down the program; 3) How did the number of requirements affect the outcome of the V22 Program? Answer: Ideally, one needs to build a vehicle with only three or four major requirements and spiral down with lower requirements. Mr. Seymour showed a video on the Bell Brand. The new Bell Brand is the dragonfly that symbolizes change. Mr. Seymour showed the audience some of their driving innovation programs. Mr. Seymour talked about what the future could look like with advanced VTOL designs; for example air taxis without pilots and autonomous pod transports.

NETWORK BREAK

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NDIA IPMD STRATEGIC UPDATE – Mr. Dale Gillam, Corporate EVMS and Scheduling Implementation Manager, Leidos, NDIA IPMD Chair

Mr. Gillam started this session by asking how many new members were present at our IPMD meeting. It seemed we had about 10% new members. Mr. Gillam then presented the board members and recognized and thanked Mr. Glenn Fujimoto who will be transferring off the board due to his new position within Northrop Grumman. Mr. Gillam spoke about our Mission Statement which is to “Lead the advancement of Integrated Program Management through industry and government partnership.” Mr. Gillam then displayed our Strategic Objectives and strategic themes along with our tactical objectives. Mr. Gillam stressed in our Collaboration section on how we need to reach out to other NDIA divisions such as NDIA System Engineering which led to displaying the NDIA System Engineering Division Conference in Tampa, FL on Oct 22 – 25. Our Division will be sponsoring a Program Management track where six of our IPMD members will be presenting. Mr. Gillam followed up by showing the 2019 NDIA IPMD events:

- Winter Meeting: Feb 6-7 in Palm Bay, FL – Event will be at Harris Corporation
- Spring Meeting: Week of April 29 in the DC Metro Area - target is Reston, VA area
- Summer Meeting: Week of Sep 9 in Denver, CO

2020 NDIA IPMD events (dates are TBD):

- Winter Meeting: Southern CA area
- Spring Meeting: DC Area
- Summer Meeting: New England area or San Antonio, TX

We are always looking for sponsors.

Mr. Gillam stated we have three candidates for the board of which two will be voted into the board:

- Lisa Hastings, General Atomics Aeronautical Systems, Inc.
- Nate Oligmueller, Northrop Grumman Mission Systems
- Gary Troop, Encore Analytics, LLC

Also, we will be voting on the acceptance of the NIDA IPMD Intent Guide.

Mr. Gillam finished by summarizing each on the Working Group missions and their Lead and Co-Lead.

REFLECTIONS FROM THE RECENT PAST CHAIR – Mr. Dan Lynch

Mr. Gillam introduced Mr. Dan Lynch on his perspectives of being the past Chair. Mr. Lynch expressed his thanks, encouragement, and support from his past vice-chair. Mr. Lynch discussed how hard it was

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to balance his work at Raytheon and as his role as a Chair for NDIA IPMD. Dan questioned, why do we do this? Why EVM? For most, we fell into this position and later became the subject matter experts of EVM. As Mr. Lynch looked back as his role as chair, he took the most pride in the collaboration with PARCA, DCMA, DOE, MSA, IC, and other government agencies as it's no longer a 'us vs them' mentality. Mr. Lynch enjoyed working with those in the government as well as with others in industry including CPM.

NETWORK BREAK - Government Departs to Separate Meeting

INDUSTRY ONLY CLEARINGHOUSE – Mr. Joe Kusick, Director, EVMS Resource Center, Raytheon Company and Mr. Gary Humphreys, CEO, Humphreys & Associates, Inc

Also included were Mr. Scott LaFrance, Mr. Yancy Qualls, and Mr. Russ Rodewald as presenters. Mr. Humphreys and Mr. Kusick reviewed the past Clearinghouse topics. They are: Updates in the DoD EVMSIG on Material Price and Usage Variance definitions and the clarification that MRP/ERP will not be repeated in the graphic for Guideline 6, harvesting underruns, Work Authorization Documents, Element of Cost (EOC), Stop Work Orders, QBDs under baseline control, and the Block 6 of the Best Case/Worse Case/Most Likely EACs wording in the IPMR DID. The Clearinghouse proposed an update to the wording on the IPMR DID and submitted it to PARCA.

New Clearinghouse topic:

- **Narrow SVT Definitions** – presented by Mr. Scott LaFrance and Mr. Yancy Qualls. This was a topic that came up during their update to the PASEG. Mr. Qualls went through some examples on where the IPMR DID definition of SVT is too prescriptive.
 - IPMR DID Definition for SVTs:
 - May be normal task or milestones
 - Used to increase management visibility and functionality
 - Represents non-PMB related items
 - Does not represent scope with the PMB
 - Not resource loaded
- Possible Recommendations:
 - Expand the SVT definition to include all valid reasons for non-resource loaded tasks, “Tasks that are not required for EV calculations, but are included in the IMS to increase management visibility and functionality...”
 - Provide another mechanism to identify PMB-related tasks with no resources
 - So that they can be properly accounted for (metrics, filtering, etc.)

The Clearinghouse notes from previous meetings can be found here:

<http://www.ndia.org/divisions/ipmd/working-group/clearinghouse>

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NDIA IPMD INTENT GUIDE UPDATE, Ms. Joan Ugljesa, Partner, New Vistas Group

Ms. Ugljesa presented a table of all the 2018 IPMD Guides with their current status and future due dates. She also presented an overview of the Intent Guide comments adjudicated for August 2018 update to the guide along with a summary of the changes to the guide.

BOARD CANDIDATE PRESENTATIONS – Mr. Gary Humphreys, CEO, Humphreys & Associates, Inc

Mr. Humphreys introduced the three new potential board members (Ms. Lisa Hastings, Mr. Nate Oligmueller, and Mr. Gary Troop) who gave short presentations on why they should be on the board.

VOTING

Voting members voted on the NDIA IPMD Intent Guide and for the two new Board members.

LUNCH

Following lunch Mr. Dale Gillam congratulated our two newest board members Ms. Lisa Hastings and Mr. Gary Troop. Congratulations!! Also, the NDIA Intent Guide was approved.

PANEL DISCUSSION WITH WORKING GROUP LEADERS – Mr. Dale Gillam, Corporate EVMS and Scheduling Implementation Manager, Leidos, NDIA IPMD Chair

Panel included: Mr. Vaughn Schlegel (Lockheed Martin), Scott LaFrance (BAE Systems), Matt Strain (CACI), and Lisa Hastings (General Atomics Aeronautical Systems).

The goal of this panel was to learn from the leadership from our NDIA IPMD Working Group leads and how to attract more people especially program managers to our division.

Mr. Schlegel – The task is to get more PMs involved within the working group by sharing their information on how they actually manage a program using earned value data. Introducing Risk Management may help expand the role of the PM and get more PMs involved. It is hard for PMs to attend as they want to know something specific on how this will help them become a better PM. We

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can also ask NDIA to ask industry via a questionnaire or survey to ask what PMs may want from our organization.

Mr. LaFrance discussed that learning more about scheduling might be a good fit for those becoming PMs. We need to find a way to incentivize companies to attend our meetings. The PMB and the IMS is the hub of proper program management.

Companies need to show the career path to the PM level. Most individuals in the EVM role do not have a direct career path, especially to the PM level.

Mr. Strain feels that his working group of Agile is getting to a maturity level. How does one keep the motivation going within his group? Using other online mediums for Division documents is one suggestion but that may hinder others to view the material. Plus, NDIA is limited in what we can do to produce online content in different formats.

Ms. Hastings – Of those of us who are managers, we should have our successors attend the NDIA IPMD meetings. She has her new employees review the NDIA IPMD Guides, especially the PASEG. Successor planning is vital as well as a mentorship program. The Working Groups have been one of the best opportunity areas to learn from other industry on certain topics.

Other questions that were raised during the panel discussion were how do we show the value of our time to our company? How can we get the younger individuals to attend? How can we package to sell/present what we learned back to our management?

What about using a medium of a “Ted Talk”? A topic can be on the IPMR, IBRs, etc.

In the advertising for the IPMD meetings, we need to add a statement, ‘by the end of the conference, you will gain this level of knowledge...’

Mr. Gillam thanked the panel and audience for their participation.

Business Benefits Realization – Charlie Mahon, PMI

Mr. Mahon discussed the value of benefit realization management. Benefits Realization Management is the identification of the processes and practices to align the benefits with formal strategy to ensure the benefits are realized and sustained during and after the project is complete. The path to greater benefit realization management maturity is to align project benefits with common strategic goals, review the information about performance against the metric and monitor the performance of benefits to ensure the continued realization of the benefits. Mr. Mahon displayed the three “Pulse of the Profession in-depth Reports” and the four “Thought Leadership Series” that are free to download from the PMI website (<https://www.pmi.org/pulse>)

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NETWORKING BREAK

IPMD WORKING GROUP SESSIONS - The group divided up into their working group sessions.

NETWORKING RECEPTION – Sponsored by Bell Helicopter Textron

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DAY #2 – Aug 29

MEETING CALLED TO ORDER – Mr. Dale Gillam, Corporate EVMS and Scheduling Implementation Manager, Leidos, NDIA IPMD Chair

Mr. Gillam called the meeting to order and thanked our host Bell for sponsoring our event. Mr. Gillam led a moment of silence to remember what we do and why we do it. He also asked those who served in the military to stand and be noticed. Mr. Gillam reviewed the updated agenda. Mr. Gillam also thanked Mr. Dan Butler who will be retiring from the Past Board of Directors. Thank you Mr. Butler as your service and dedication will be missed!

Mr. Gillam presented a slide on the IPMW 2018 Conference at the George Washington University, Marvin Center, Washington DC on Nov 13 – 15, 2018. The workshop will be two full days and one day of testing. Registration is now open and there's a block of rooms at the Westin (see the CPM website for details). Mr. Abba displayed the CPM Governing Board Elections that opened on Aug 30.

RECOLLECTIONS OF A PROGRAM MANAGER – Mr. Bob “Too Tall” Kenney, Engagement Director, Humphreys & Associates, Inc.

Mr. Bob “Tool Tall” Kenney discussed the differences on the approach of how some companies utilize earned value management. There are some companies who spend a lot of money on EVM as they are slow with maintaining their EV certification and are constantly updating corrective actions or are approaching withholds territory. At the other extreme, some companies have the EV SME(s) and have a very efficient process on maintaining their EV certification including process improvement. For those companies, the cost of EVM is minimal. The bigger question is what is the cost of not doing EVM? Mr. Kenney answered that question with “about two years of additional costs and a lot of overrunning programs.”

Mr. Kenney explained the different types of program reviews he has seen through the years. One is the typical ‘dog and pony’ show where the PM explains everything except the issues on the program. Many times earned value is totally left out of the program reviews. Mr. Kenney stated that during program reviews, he would use the term earned value ‘countermeasures’ that can question the program manager’s EAC. Some of these ‘countermeasures’ are IEACs (example: BAC/CPI_{cum}), reviewing the program’s risk register, and reviewing the program’s Estimated Completion Date (ECD). The following statements have been used in past program reviews and should cause a red flag: “more and better staffing is coming soon”; “the BCWR will be easier than the $BCWP_{cum}$ ”; “the IBR findings will improve our performance”; “We have a high level percentage of LOE tasks”; “our schedule health metrics are improving”, and “we will out-source to lower our FFP subs”.

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To help improve training, Mr. Kenney used the common quote, “Tell me and I’ll forget. Show me and I’ll remember. Involve me and I will learn.” He suggested to tie the training material to the company processes and tools and to mistake proof your EAC processes.

Mr. Kenney reminded us that if one received a guideline 27 (EAC) Level III CAR, it is really tied or influenced by other guidelines such as guidelines 1, 2, 16, 21, 22, 23, 24, 25, 26 & 29. One should review the processes of those guidelines to help clear the Level III CAR. Observations that your EAC may be questionable are:

- The declared EAC (most likely) is lower than all IEACs;
- The declared EAC equals an IEAC;
- The customer rejects your declared EAC again;
- The EAC equals the contract value, the BAC, the Target Cost or Ceiling Price;
- The declared EAC does not equal the Format 1 at completion sums
- The declared EAC in the Format 5 explanation is not credible.

Mr. Kenney finished by asking the audience if DCMA is a friend or foe? Mr. Kenney answered that DCMA is a ‘tough love’ friend. One of his suggestions is to not let DCMA understand more of your company or your program than you do and to always review and understand your ECD.

PARCA – Mr. Gary Bliss, Director, Performance Assessments and Root Cause Analysis (PARCA)

Mr. Dale Gillam introduced Mr. Bliss. Mr. Bliss had three topics to discuss:

- 1) Recognition – This forum, NDIA IPMD, is very important to the government for two reasons: 1) This is the best way to communicate many issues to the audience and 2) it is the primary forum to receive feedback from industry to develop the guidance. Mr. Bliss took this time to thank Mr. Dan Lynch for his time and service to the NDIA IPMD. His leadership has helped tremendously with their EVM policy.
- 2) A&S reorg – Ms. Lord envisions the day the work will be performed by the services. With the ever changing world, the DoD Assistant Secretary of Defense (Acquisition) has been moving at a slower pace. The vision is for the OSD to no longer be in the oversight business but to establish policy making and portfolio management. Mr. Bliss believes there will be a conflict with this vision on the Nunn – McCurdy breaches and when programs are overrunning. If Congress has questions, they want to talk to the OSD not the services. As part of the reorg, even though PARCA is involved with the job losses, Mr. Bliss will not be included in the new reorganization so this will be his last presentation in this position. He ended by saying there is no one who believes EVM is bad for Defense.
- 3) Where are we going - Adapting EV principles in the agile world. The core is the schedule and burn rate is essentially fixed every six months. The variable is the content of the work. Their Agile and EVM Guide for program managers helps to align the agile methodology with EVM, but

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it does take discipline. One should apply the same rigor as before on an agile program. This process can also be applied to space programs too with the ever changing requirements.

After the presentation, Mr. Joe Kusick thanked Mr. Bliss on all his support and work on collaborating with industry a certificate of appreciation and a plaque from General Carlisle (NDIA president and CEO).

NETWORKING BREAK

PARCA POLICY UPDATES, IPRM REV B DID, EVMSIG – Mr. John McGregor, Deputy Director of Earned Value Management, Performance Assessments and Root Cause Analysis (PARCA)

Mr. Gillam introduced Mr. John McGregor. Mr. McGregor showed the current organization chart. This will be updated due to the new reorg in about another month. McGregor displayed the OUSD A&E and R&E organization charts.

He then discussed the following topics:

- **EVMSIG Revised** – Published in February 2018. However, there were a few updates to be completed. Those updates are now completed and the guide is waiting to be placed on their website. Mr. McGregor thanked NDIA for helping with the comments to help them understand where industry stands with the issues.
- **MIL-STD-881D** – Published in April 2018.
- **DFARS Update** – Currently sitting at the OMB. Once it goes in the public register, everyone will have 90 days for comment. Mr. McGregor will notify us when this will occur.
- **5000.02** – PARCA delegation for EVM applicability reviews. Change version 4 is still in process. The change is in Table 8.
 - o Discussion on EVM applicability – Have the conversation. If not EVM, then how will you manage the program?
- **EVMIG** – Single document that contains disparate EVM policy application. This is in final review with a forecasted publish date for late summer of 2018.
- **IPMR Rev B (IPRM2)**: Goal is to reduce time to receive actionable data and support DCMA compliance activities.
 - o Move from XML to JSON standard – modern and more flexible.
 - o Delivery of contract performance data at the CA/WP level allows for user-specific analysis; tools can generate traditional reporting formats if desired.
 - o Data Delivery Submittal Requirements:
 - Submitted electronically in accordance with their applicable DoD approved file format specifications and data exchange instruction (DEI) – Contract Performance dataset and Schedule Dataset;

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- Submitted in contractor's specified electronic file format – Performance narrative report;
- Submitted in contractor's native scheduling software electronic file format native format – Integrated Master Schedule (IMS);
- Received almost 1,000 comments. Most of them were on the timing (delivery requirements) and technical implementation. PARCA will have an adjudication meeting with Industry in September 2018.
- **DoD Agile and EVM Guide Update**
 - OMB has recognized that Agile and EVM complement each other and can co-exist. Agile development can be used to incrementally deliver functionality to the customer while EVM provides a standard method for measuring progress. Another point of view is how an IBR event fits into an Agile environment.
 - Guide to include Agile and EVMS Compliance, IBRs, Reports, Metrics and Analysis, and an Appendix to include Agile and EVM Scenario.
 - The Guide should be published in the spring of 2019.

DOE UPDATE – Mr. Mel Frank, Director, Project Controls Division, Office of Project Management (PM-30, Department of Energy

Mr. Frank's presentation was on "EVMS within DOE and contractor Self-Governance". Mr. Frank, who has been visiting other DoE sites, outlined his presentation:

- EVMS is the contractor's method of doing business.
- Self-governance is an internal process and that needs continuous improvements. It's a team support involving everyone (programs, finance, program office, procurement, etc.).
- The EVMS needs to be discipline approach.
- There needs to be an objective approach not subjective. Eliminate the self-interpretation preference.
- The EVMS data must be reliable and credible with a rearview looking and a forward-looking process.
- It must be effective and efficient; not a time consuming process with a position of success with PM excellence.

The DOE has an Open Certification Framework than includes: Self-assessment, Independent assessment with based certification, and continuous monitoring.

The DOE has an "EVMS Compliance Review Standard Operating Procedure (ECRSOP)" that contains 82 attributes from the NDIA IPMD Intent Guide. The DOE has 197 data driven metrics with an operating tool to be available by the summer of 2019 for contractors to maintain their self-assessment. Testing will be at the attribute level not at the test metric level.

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The DOE has completed a certification process for CNS of which Mr. Frank showed some results from the self-governance process.

Their path going forward is to release their EVMS Guide, develop a Planning and Scheduling Amplification Guide, another round of site visits, and a listing of upcoming compliance reviews.

PANEL: COMPLIANCE AND SURVEILLANCE REVIEWS AT DOE – Moderator: Mr. Dave Kester, Director, EVM Policy and Strategy, Department of Energy

Panel included Ms. Lisa Cazalet (Los Alamos National Laboratory), Ms. Lisa Frank (Consolidated Nuclear Security), Mr. Bob Sudemann (Fluor Government Group), and Greg Smith (Humphreys & Associates).

Mr. Kester introduced the panel and stated the topic of the panel discussion is on EVM Compliance.

How does the culture affect the EVM? – Ms. Cazalet answered that even though they had the training, they were still not using the earned value data in a timely manner to make decisions. The key is to use the data throughout the month not just at the end of the month. This needs top down support to get the Project/Program Manager engaged in using EVM and which metrics are the key to help manage a program. It is not just in the program but it is the whole organization. She starts by understanding their issues and to show them how to use the data and tools to help them understand the data. She also shortened the PM training to keep them more engaged.

Ms. Frank described the updated DOE data driven metrics and explained how that data can be used to manage the program. Plus by shortening the number of metrics, the programs can use the data driven metric more often and react to those metrics that trip the thresholds.

Mr. Sudemann challenge was to streamline and standardize the process so it will not be a challenge for the contractors. Some of the items to help reduce the cost include: Establishing a team of EVM SMEs to review the different programs. They also standardized the system descriptions across the sites, and provided mock interviews to help prepare for the reviews. He uses other people from other programs to be on the surveillance review teams as this helps team members understand the process better and to help prepare for their own interview process. Findings are also shared to help the other programs.

Mr. Smith discussed how they shared the processes of the surveillance reviews including the sharing of the surveillance questions. Invest the time and resource to learn and seek information about EVM and surveillance. Having Mr. Mel Frank attend these sessions and investing his time to help collaborate between the programs and the surveillance team.

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Ms. Cazalet mentioned that communication, trust, and partnering between the contractors and the DOE to work together to support the data driven metrics and surveillance reviews. This resulted in a lower number of CARs for the contractor by working together with the government and contractor.

NETWORKING LUNCH

DCMA UPDATE – Mr. Kevin Carney, Acting Policy EVMID, DCMA

Mr. Carney thanked Mr. Shane Olsen and Mr. Russ Rodewald for their service at DCMA as they now have jobs in the private sector. DCMA is currently looking for a new EVMS Director, EVMS Deputy Director and Policy Director. Currently, Ms. Donna Holden is the acting EVMS Director.

Mr. Carney discussed the mission of DCMA, which has not changed, and the status of the seven Business Practices. Three of the seven business practices are still open: Contractor System Description Review (BP2), Compliance Review (BP6) and Metric Configuration Control (BP5). Mr. Carney displayed the 2018 surveillance results from the BP4 Group 1 metrics. The data displayed 65 surveillance events with 2,943 metrics executed. Of which 513 metrics tripped the thresholds and 17% of those tripped metrics needed further investigations. DCMA is currently working on their 2019 system surveillance plans and they have scheduled 10 compliance reviews with industry.

DCMA future will be to focus on the consistency of oversight across contracts (performed by the same group), have early engagement with the PMO and contractor, leverage internal oversight to limit the number of onsite engagements and to push towards an automated assessment of data driven metrics.

You might have noticed that DCMA has changed their email address from @dcma.mil to @mail.mil.

NASA UPDATE – Mr. Jerald Kerby, EVM Program Executive, NASA

Mr. Jerald Kerby presented that NASA has made a change in their EVM leadership. Their EVM leadership along with all PP&C functions moved from the Office of the Chief Engineer (OCE) to the Office of the Chief Financial Officer (OCFO). The hierarchy chart of NASA can be found in their presentation.

Currently NASA is awaiting DoD to submit its final DFAR language to the OMB for comments to release their updated version. NASA is aligned with the DoD thresholds to \$100M and period of performance to 18 months. NASA increased their EVM thresholds for Class D projects to \$150M.

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NASA EVMS Surveillance approaches are typically delegated to DMCA. For university and/or labs with multiple NASA contracts, NASA will perform surveillances with data driven metrics with deep dives as necessary.

NASA also has a new “gold card” which can be found in their presentation.

PASEG 4.0 UPDATE – Mr. Scott LaFrance, BAE Systems and Mr. Yancy Qualls, Engagement Director, Humphreys & Associates, Inc

This also includes the PASEG Working Group out-brief. The working group was delayed with their adjudication of 613 comments due to the topic of SVTs and Schedule Margin. The team is about 63% complete. Other discussion topics include how to schedule ‘on-call’ support as this cannot be predicted in advance so most use LOE. However, if LOE is used, how do you model the support effort that may hinder progress on other discrete tasks? The group has not come up with a solution but would like to have more discussions. The working group has not submitted any of these comments or suggestions to PARCA.

The PASEG Working Group discussed if the new EVMSIG and IPMR Rev B will have any impacts on the PASEG. Their goal is to publish the PASEG by the spring of 2019.

WORKING GROUP OUT-BRIEFS

- **Clearinghouse Working Group:** Below are the topics discussed. Please see the Clearinghouse Working Group minutes for the details <http://www.ndia.org/divisions/ipmd/working-groups/clearinghouse>.
 - o Material Price & Usage Variance definitions will be fixed in the Glossary by PARCA in the EVMSIG.
 - o PARCA also clarified that in the EVMSIG the MPR/ERP is not to be repeated in the schedule and the graphic will be updated (figure 6 in Guideline 6).
 - o Harvesting Underrun should be avoided as it is not an acceptable practice.
 - o Best Case/Worse Case/Most Likely EAC language in the IPMR DID.
 - o Long open work packages and adding scope in the freeze period?
 - o Planning in one Element of Cost.
 - o Stop Work Order.

- **Agile and EVM Working Group:**
 - o Planning on updating the guide to version 1.3. The team is looking to expand a section to include Contracting for Agile and EVM, and a new section on agile metrics.
 - o Draft to NDIA Community in the December 2018 timeframe.

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- The working group is looking to be a resource for agile implementation and become a Frequently Asked Questions group to support industry. Issues can also be linked to the NDIA IPMD Clearinghouse working group.

- **CSDR Working Group:**

This working group continues to flow information from CAPE to industry

- Mr. Steeno reviewed the Cost and Technical Focus Group meeting that was on June 27-28. Highlights include:
 - The FlexFile is the main government initiative.
 - CADE presented the results of the 23 pilots.
 - CADE still looking for another 25 phase four pilots.
 - Pilots are still using Excel or CVS files.
 - CADE is now looking for a 90% solution.
 - Plan is to lock down the FlexFile DID by January 2019.
 - Maintenance and Repair Parts (1921 M/R DID).
 - Consolidated Bill of Material (CBOM).
 - The CADE focus group summary notes are on the CADE website; click on “News”.
- 1921- Technical Data DID (Nov 2017)
 - Industry concerned that no Pilots are planned
- 1921-Quantity Data DID (Nov 2017)
 - No pilots yet to be performed, yet CADE states that the 1921-Q needs to be submitted with the FlexFile
- 1921-Maintenance
 - Industry recommends pilots to test this concept
- Consolidated BOM
 - Industry concerned with the CBOM DID. Classic BOM preferred.
- The Working Group recommends that CADE provide role capability similar to EVM-CR feature for your company.

- **Prime/Sub Working Group:**

- Their tasks include finishing a white paper on Management Reserve and providing a checklist approach for key considerations when entering into a prime/sub relationship.

- **IBR Working Group**

- Received 100 comments with 30% on minor issues.
- Submit to membership for comments in Oct – Nov 2018.
- Board of Directors review in Feb 2019.
- Electronic approval of the guide in April 2019.

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- **Program Management Working Group:**
 - o Partnering with the NDIA System Engineering Division
 - NDIA System Engineering Conference is Oct 22 – 25, 2018. We will have a PM track at the NDIA System Engineering conference.
 - o Bring new content into the NDIA IPMD 2019 winter meetings with a PM focus.
- **Surveillance Guide Working Group:**
 - o The Surveillance Guide is being reviewed by the Board.
 - o Submit to Industry/Government in Sep 2018.
 - o Electronic approval of the guide in Nov 2018.

NETWORKING BREAK

GOVERNMENT PANEL – Panelist: Mr. John McGregor (PARCA), Mr. Dean Nifakos (DCMA), Daniel Goldsmith (DCMA), Ms. Denise Kerby (MDA), Mr. Jerald Kerby (NASA)

This is an open forum to ask any question to our government panelist. After each question is the answer along with other discussion points from industry.

Question: DCMA has a request for a data dump on Christmas morning. Is this correct?

- IPMR2, DFARS, discussing standard data to see if it's working, and to continue to hear the contracting officer is taking the blame for everything.

Question – We have all these different agencies that have different requirement but we have the same EVMS so we can't the government have the same rules?

- PARCA's response was the main reasons for the different requirements come from the Legislature branch of the government. That will have to change in order for all agencies to be consistent.

Question – What have been some of your issues with industry?

- DCMA has seen significant improvements in communication and collaboration between the government and industry. The relationships have improved. Industry often reads too much into the requirements, so let's have the conversation about the requirements. PARCA suggested we pick up the phone and discuss the issues/questions with our customers. From MDA, they are constantly changing requirements due to ever changing world events, so change control management/requirements are harder to manage.

Question – What type of training is available due to the turnover seen in the government?

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- PARCA owns the requirements for the earned value analyst functional model. Each agency has an earned value 'department' for training. The agencies are allowed to code the EV personnel. Based on their code, each person must take the required training through DAU. EV will not go away as its part of the fundamental part of Program Management.
NASA is thinking about the age of retirement for some of their EV analyst as many may be retiring in the next 5 years. The EV people need to be more involved with the budgets instead of just being involved with compliance.
MDA has a rotational process so the individuals are well-rounded in their training and they have a career ladder to a senior level analyst.

Question – Where should EV be located in a company?

- PARCA does not care too much on where EV is located in a company as long as the function is being performed.

SUMMARY AND ADJOURNMENT – Mr. Dale Gillam, NDIA IPMD Chair

Mr. Gillam thanked the audience for attending our event and for Bell for hosting our event.

Thank you for attending and see you at the next NDIA IPMD meeting at the Harris Corporation in Palm Bay, FL on Feb 6 – 7, 2019.