**Overview**

The NDIA PMSC has five published guides. These guides are: the Earned Value Management Systems (EVMS) Intent Guide, the Surveillance Guide, and The Program Manager’s Guide to IBRs, the System Acceptance Guide, and the Application Guide. In January 2009, the Officer’s Council of the PMSC chartered a working group to:

* Assess the user requirements to determine if any guides should be eliminated or if new guides are needed.
* Determine if the existing guides need updated.
* Implement the changes required to the existing guides.
* Establish a process for how the PMSC guides will be maintained and controlled.

As a source of input, the working group conducted an open survey to the EVM community in June, 2009, to get feedback on the existing guides and the needs in the community. The results of the survey have been factored into the working group discussions and this plan for evolving the NDIA PMSC guides.

**Brief Summary of Existing Guides**

**EVMS Intent Guide** – To define what is the intended meaning of the ANSI-EIA 748 Guidelines. Primary Customers: Industry, DOD, Civilian Agency.

**Surveillance Guide** – To define how a company demonstrates on-going compliance to the ANSI-EIA 748 Guidelines. Primary Customers: Industry, DOD, Civilian Agency.

**The Program Manager’s Guide to IBRs** – To define how to conduct an IBR. Primary Customers: All FAR/DFAR Agencies and Industry.

**System Acceptance Guide** – To define how to obtain initial acceptance of compliance to the ANSI-EIA 748 Guidelines. Primary Customers: Civilian Agency.

**Application Guide** – To define how to use the other NDIA PMSC guides. Primary Customers: Civilian Agency.

**Strategic Plan Components**

1. Strategic Final Goal
2. Strategic purpose and historical perspective for the NDIA PMSC Guides
3. Commitment to maintaining the guides
4. Special interest topics
5. Update process
6. Membership of update team
7. 2009-2011 update schedule
8. **Strategic Final Goal**

NDIA PMSC will produce and maintain supplements to the ANSI-EIA 748 guidelines that are recognized and useful to both industry and government communities.

1. **Strategic Purpose and Historical Perceptive for NDIA PMSC Guides**

The guides were developed as supplemental guidance to support the implementation of ANSI-EIA 748. The guides are used to some extent by both industry and customer communities. Currently all of the guides are recognized by the OMB or OSD documentation. The Capital Programming Guide references the use of all five guides. Each guide was produced by the committee at the request of the government. Details of these requests are:

* + 1997 – Joint Government and Industry team defined the key principles of a successful IBR process
  + 2002 – Request by OSD to define surveillance process
  + 2004 – Request by OSD to define intent of EVM guidelines
  + 2006 – As part of the EVM FAR Case, OMB requested the application and acceptance guides

According both industry and government have vested interests in the guides and a stake in this strategic plan. The guides are part of industry’s commitment as the subject matter experts of the ANSI-EIA guidelines.

1. **Commitment to Maintaining the Guides**

The NDIA PMSC must have a plan for continual updates and maintenance of the guides. The NDIA PMSC should bring all existing guides to formal publication and start an initial update of each guide, and then commit to a two year update maintenance cycle with a target release of a revised guide in the third year.

The EVMS Intent Guide is the exception in that revisions should be minimally linked to the ANSI EIA 748 Standard update cycle. This guide and others may be updated more frequently based on industry/government requirements.

1. **Special Interest Topics**

The following special interest topics need to be addressed within existing guides as areas of emphasis, appendices; or as white papers or as supplemental publications.

Planning and scheduling

Program versus Project Level EVM

Prime versus Subcontractor Issue

Risk management

Revision and change control

EVM scaling and tailoring

Lessons learned in obtaining and maintaining an EVM validation

1. **The Update Process**

Once a guide update has been declared by the committee, a call for joint government – industry membership for an update team will be requested. Final products are submitted to the joint industry – government PMSC distribution a month before a vote is requested. Then if the Guide requires concurrence by either OMB or OSD, the guide is forwarded to these agencies for a final review. Accepted and approved guides are published on the NDIA PMSC website and available for public use. The total process expected to be at a minimum 9-12 months in duration for a complete update.

NDIA PMSC reserves the right for a shorter update cycle related to errors or updates based on clearinghouse concerns. These type changes are handled through the NDIA PMSC Officers and directly presented to the body for approval without the pre-review. Since the committee only meets three times a year this allows for errors to be fixed in adequate timeframes.

1. **Membership of Guide Update Teams**

Industry membership will be from the Guides Subcommittee with open membership. The broad PMSC membership will receive the document and a chance to provide inputs both in the initial update phase and in the review phase. Each guide update subteam should have government representation as well. The Intent, Surveillance and IBR guides should as a minimum have civilian, DCMA, and Intel representation.

1. **2009-2011 Guides Update Schedule**

**Priorities**

1. **The Program Manager’s Guide to IBRs**
2. **ANSI EIA 748 Intent Guide**
3. **Surveillance**
4. **System Acceptance**
5. **Application**

**IBR Guide Update Plan (Tentative)**

1. August 2009 – Approval to begin and team membership
2. September 15, 2009 – Guide Team Publication of detail update plan
3. September 30th, 2009 – Chair distribution of plan and prior baseline to joint industry –government with call for comments. Comment period ends with fall IPM conference.
4. November 13, 2009 – Working group at fall conference regarding comments. Final input received.
5. March 31st, 2010 – Draft IBR Guide review copy
6. April 15th 2010 – Final Draft Copy
7. May 2010 – Committee vote on Intent Guide
8. May 2010 – Distribute to government for acceptance
9. August 2010 – Target for final publication with government acceptance.

**Intent Guide**

1. May 2010 – Approval to begin and team membership

**Acceptance Guide**

1. April 2011 – Approval to begin and team membership

**Surveillance Guide**

1. August 2010 – Approval to begin and team membership

**Application Guide**

1. April 2011 – Approval to begin and team membership