



*CRITICAL THINKING.
SOLUTIONS DELIVERED.*

Integrated Baseline Review (IBR) Guide Update

September 10, 2013

Neil Albert

Outline

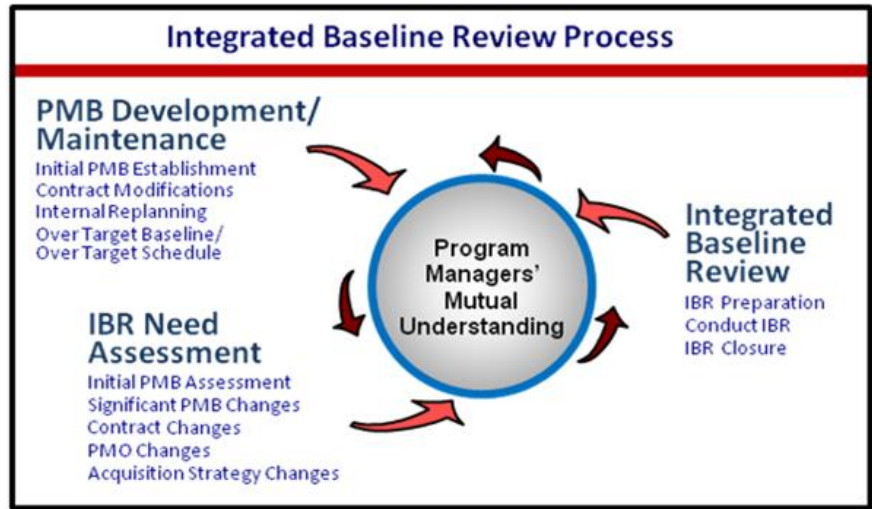
- Why Update?
- Process Flow (Current vs. Proposed)
- Proposed Process Flow (Detailed)
- Timeline
- Participation
- Chapter Lead (Industry/Government Co Leads)
- Development Status

Why Update?

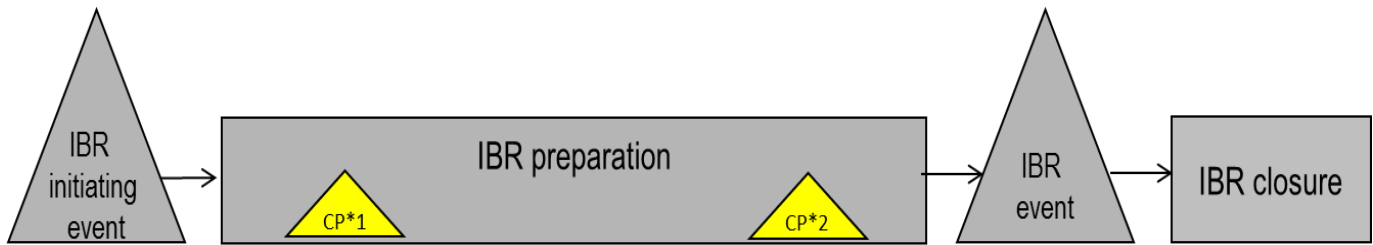
- Current IBR Guide at too high level to be effective
- Almost one-third the guide is focused on “Pre-Award” IBR
- Emphasis on overarching process and not on critical reasons for having an IBR
- Focus needs to be on executability of the program baseline and risk in accomplishing it
- Ensure this is not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

Process Flow

Current IBR Guide Process Flow

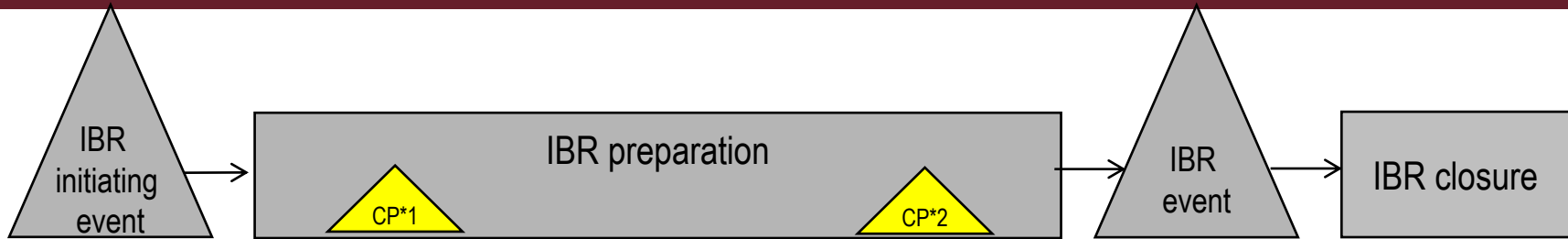


Proposed IBR Guide Process Flow



* CP = Readiness Checkpoints

IBR Flow Process



* CP = Readiness Checkpoints

3. Identify reason for the IBR:

- 3.1 New program or project
- 3.2 Significant Follow-on changes
 - 3.2.1 Significant PMB Change (e.g., OTB, OTS)
 - 3.2.2 Significant change in contract execution risk
 - 3.2.3 Change to the PMO management team
 - 3.2.4 Options Exercised
 - 3.2.5 Acquisition Strategy Changes
 - 3.2.6 Funding profile changes
 - 3.2.7 Rolling Wave/periodic progress

Appendices

- Relationship to contracting
- Pre-award IBR Process
- Program Level IBR Process
- Vendor/Subcontractor Flow Down

4. Identify key program elements:

- 4.1 Define Supplier IBR artifacts and requirements
- 4.2 Supplier Vendor provided artifacts (to the customer)
 - 4.2.1 High level WBS/OBS
 - 4.2.2 IMS
 - 4.2.3 Funding Profile
 - 4.2.4 Risk and Opportunity Management Plan
 - 4.2.5 Identify IBR Participants (incl vendors)
 - 4.2.6 Others as defined by Customer
 - Major deliverables (WBS Dictionary, \$ RAM, etc.)
 - System storyboard preparation
 - IMP
- 4.3 Define Customer IBR artifact requirements
 - 4.3.1 Funding Profile
 - 4.3.2 Major Milestone Schedule
 - 4.3.3 Outline IBR prep expectations and timing
- 4.4 Identify Risks and Opportunities
- 4.5 Establish IBR event Entrance and Exit Criteria

5. Confirm readiness for IBR

- 5.1 Supplier Requirements
 - 5.1.1 IMS integrated with PMB
 - 5.1.2 PM/CAM preparations
 - Notebook, simulated interviews
 - 5.1.3 Preparation and Dry run of PM in-brief and welcome
 - 5.1.4 Finalize Supplier IBR Team members
 - 5.1.5 On-site facility preparations
- 5.2 Customer Requirements
 - 5.2.1 Finalize scope of IBR (control accounts)
 - 5.2.2 Establish IBR Agenda
 - 5.2.3 Finalize customer IBR Team Members
 - 5.2.4 On-site Facility consideration
- 5.3 Understand process for risk and opportunity
 - 5.3.1 Handling plans
 - 5.3.2 Use of MR and impact
 - 5.3.3 Items that may drive future baseline changes
- 5.4 Joint IBR training
- 5.5 Ensure joint commitment for IBR objectives

6. Conduct IBR

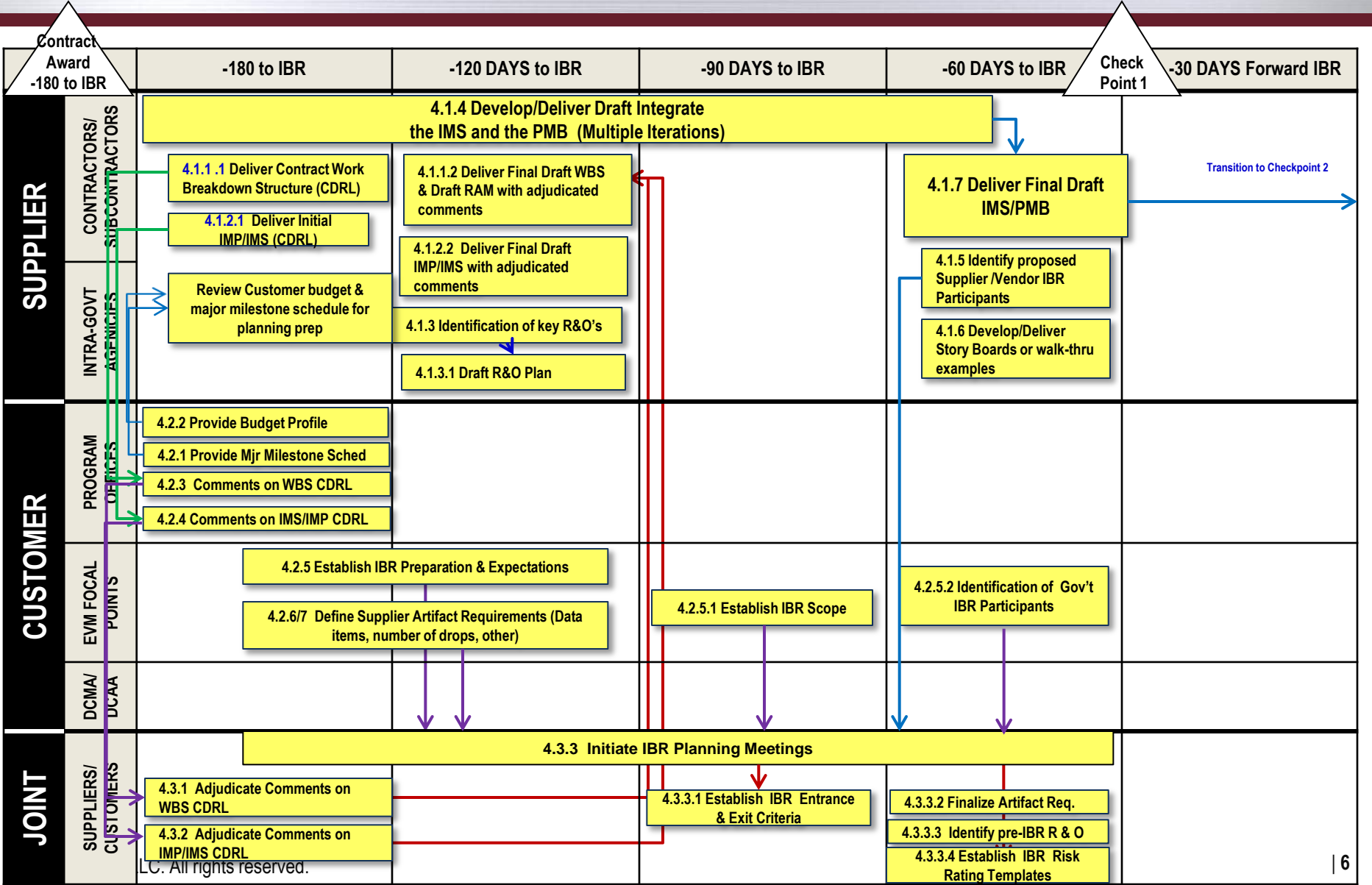
- 6.1 IBR Introductions
 - 6.1.1 In brief and Welcome by PM
 - 6.1.2 Provide overview of IBR
- 6.2 CAM Overview and Responsibility
 - 6.2.1 Technical
 - 6.2.2 Schedule
 - 6.2.3 Cost
 - 6.2.4 Resources
 - 6.2.5 Management Processes
 - 6.2.6 Risks and Opportunities
 - 6.2.7 Record outcomes
- 6.3 Supplier/Customer Mutual Understanding of Outcomes
 - 6.3.1 Knowledge and understanding of areas of responsibilities
 - 6.3.2 Realism and executability to PMB
 - 6.3.3 Risk Mitigation and exploitation of opportunities
 - 6.3.4 Effective use management reporting systems
- 6.4 Preparation and delivery of IBR Out Brief
 - 6.4.1 Introductions
 - 6.4.2 Identification of action items
 - 6.4.3 Develop of correction action plan
 - 6.4.4 Integrate outcomes with Risk Management Plan

7. Post IBR Actions/Closure

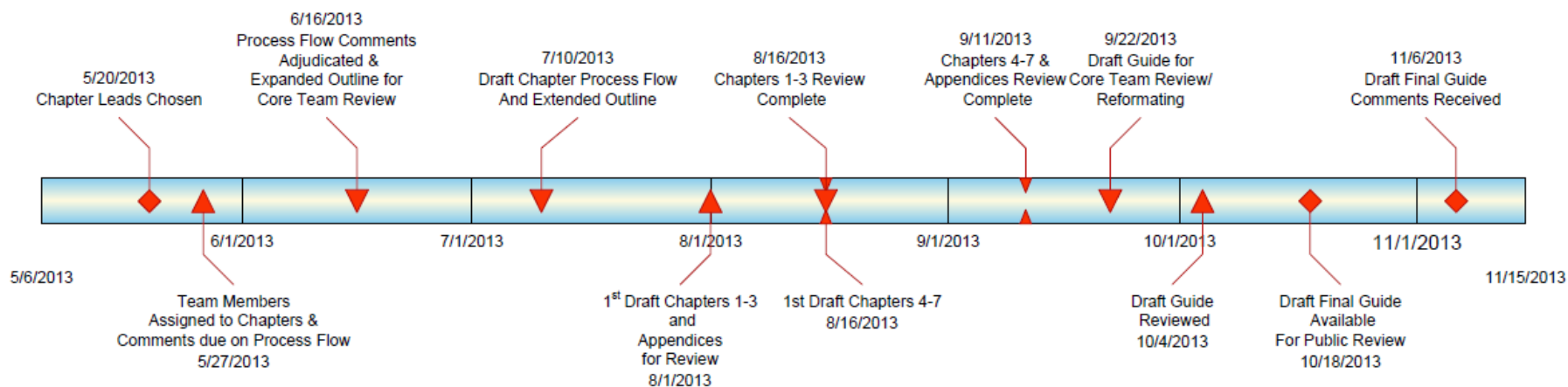
- 7.1 Supplier actions
 - 7.1.1 Execution of IBR Corrective Action Plan
 - 7.1.2 Address action items
- 7.2 Customer actions
 - 7.2.1 Preparation of Final Report
 - 7.2.2 Focus on risks, observations and actions
- 7.3 Continue program management and governance

IBR Preparation - Confirmation of Readiness for IBR

Readiness Checkpoint 1 Elements



Proposed Timeline



Participation

- Government

- Department of Energy
- Federal Aviation Administration
- Intelligence Community
- Missile Defense Agency
- Navy (NAVAIR, SPAWAR, NELO)

- Industry

- Abba Consulting
- BAE Systems
- Boeing
- Charter Performance Mgmt Grp
- Eva Inc.
- EVM Services
- Harris
- Lockheed Martin
- MCR, LLC
- Niwot Ridge Consulting
- Pinnacle Management
- PWC
- Raytheon
- Rolls-Royce
- SM&A

Chapter Leads

<u>Chapter</u>	<u>Leads (I)/(G)</u>
Chapter 1 – Introduction	Abba (I)
Chapter 2 - IBR Flow Process Overview (introduction of the flow process diagram)	Albert (I)
Chapter 3 - Initiation of the IBR Process (Determining the reason for an IBR)	Miller (I)/Hycoop (G)
Chapter 4 - IBR Preparation – Identification of Key Program Elements - Readiness Checkpoint 1 Elements	Nobel (I)/ Andrezza (G)
Chapter 5 - IBR Preparation – Confirmation of Readiness for IBR - Readiness Checkpoint 2 Elements	Johnson (I)/ Robinson (G)
Chapter 6 - Conduct the IBR	Chadick (I)/ Hogrebe (G)
Chapter 7 - Post IBR Actions/Closure	Linville (I)/Bembers (G)
Summary	Albert (I)
Appendices	
A. Relationships to Contracting and Contract Type	TBD
B. Pre-award IBR process	Morris (I)/Kong (G)
C. Program Level IBR Process	Everage (I)/Forbes (G)
D. Vendor/Subcontractor Flow Down Requirements	TBD
E. References/Acronyms	

Development Status

- Chapters/Appendices focused on “results based approach” using each chapter process identified
- Detailed process flow with deliverables for each Chapter
- Developed outline - extended outline for each chapter
- Chapters 3 thru 7 in draft format
- Chapters 1,2 and Summary still in extended outline
- Appendices A,B, and D not started
- Completion of guide dependent on Chapter Lead and volunteer availability