

# NDIA PMSC Meeting Minutes

## Industry/Government Meeting - January 29, 2014

1. Ms. Tracie Thompson, PMSC Chair, called the meeting to order and welcomed all the attendees. Tracie again thanked Deltek for sponsoring the meeting, and introduced Carol Boser and Dan Lynch as the new Chair and Vice Chair of the (now) Integrated Program Management Division. The attendees introduced themselves.
2. Wayne Abba and Gary Humphries memorialized Larry Stone (1914-2013), one of the thought leaders who helped develop EVM as it is practiced by the US Government.
3. Brad Arterbury of Deltek presented Acumen, a Deltek risk management product. Acumen was acquired by Deltek in 2013, and the Acumen product was developed to support the concepts of a) robust scheduling, and b) integrating risk management with planning. The tool features monte carlo simulation, integrated risk register, and support both schedule and cost risks. Features the important distinction between uncertainty and risk events.
4. Jerald Kerby presented the Civilian Agency/Industry Working Group (CAIWG) update. Jerald reviewed the focus areas of the CAIWG, and talked about the groups initiative to produce an EVM tailoring or scalability guide intended to help non-DoD agencies apply EVM in a manner suitable for their needs.
5. Yancy Qualls presented the update from the Planning and Scheduling Working Group. The Working Group has spent considerable time supporting the predictive measures guide. The group is preparing to update the Planning and Scheduling Excellence Guide (PASEG). Areas of focus included the definition of critical path, agile scheduling, schedule margin, earned schedule and several others.
6. Bess Dopkeen of DOD Cost Assessment and Program Evaluation (CAPE) presented the Cost Assessment Data Enterprise (CADE) Project. The goal is to be able to access and synthesize large amounts of data quickly. Bess is focused on making it more efficient to generate the Cost Data Reports. The objectives of the CADE project are to improve analyst productivity, effectiveness, data duality and reporting compliance improvement, and source data transparency. Bess summarized her goal for working with contractors as "you push a button, we get the data." She is very open to ideas for improving the process for submitting and reviewing contractor data, and encourages committee members to reach out to the CAPE with any suggestions. The Spring CSDR meeting is tentatively scheduled for late March or early April; contact Bess at [bess.r.dopkeen.civ@mail.mil](mailto:bess.r.dopkeen.civ@mail.mil).
7. <Break>
8. Bill Altman presented the Program Management Working Group out-brief. Bill notes that we are now an Integrated Program Management Division, and we need to broaden our discussion of program management practices beyond EVM. The working group is looking at ways to promote the use of the NDIA PMSC (now IPMD) LinkedIn site, which has a strong membership but low traffic. Ideas include having the working group leads post updates (for instance, as a news feed) to the site on a monthly or bi-monthly basis.

Bill then discussed the schedule for the Predictive Measures Guide, which will go to the Board for review in February and to the membership for comment in April 2014.

Bill discussed his research on "What makes a world class PM organization?" There will be a panel on the topic in April.

9. Gordon Kranz presented the PARCA update. Major topics:

Regulatory updates - DFARS, EVMS Intent Instruction, DoD 5000.02, and DAG. The DFAR is being updated to add work scope or type as a consideration when applying formal EVM requirements to a contract, not just dollar value. DoD is developing an intent instruction to use in performing compliance and surveillance, which will leverage the NDIA intent guide. There will also be an Interpretive Guide to support government implementation of the ANSI EVMS standard. DCMA noted that they are currently using the most recent version of the ANSI-748-B standard during compliance reviews. An update to the 5000.02 was distributed in December, and PARCA is helping with DAG updates to ensure alignment with the 5000.02 and other policy.

IPMR Implementation - Addressed validation of data using the new XML standards. Not all possible outputs are being tested, so the government will not validate specific tools. Discussed evidence that the IPMR is being used and the XML file delivery stages. Gordon asked industry to bring any issues with implementation of the IPMR to him so he can get them fixed.

EVM Data Requirements and Issues and Interpretation Status - Developing an EVM Data Requirements Review Form to help PARCA assess whether and to what level EVM should be imposed on contracts. PARCA doesn't make the determination, but does provide advice to the EVM stakeholder. Discussed the PARCA process for resolving EVM related issues and recent issues including IPMR questions, planning the BCWS beyond the contract POP, and XML file validation.

Gordon finished by stressing that he considers working with industry to improve the state of practice and regulation extremely important and encourages committee members to reach out to PARCA with their ideas and suggestions.

10. <Lunch>

11. Joe Sweeney of DCMA provided an update on the DoD EVMS Interpretive Guide efforts. Noted that PARCA is the owner of policy, but DCMA is responsible for developing the testing protocol that will be used to validate their implementation of the Guide when it is developed. One of the slides shows a schedule with the Intent Guide being completed in June and the DCMA Interpretive Guide completing in August.

12. Dave Kester presented on Turbo EVMS Compliance. The primary goals are to Promote Consistency, Reduce Complexity, and Eliminate Costs; going from Tax Law to Turbo Tax. Dave reviewed the comments against the guidelines from the EVM IPT; over 300 comments received. The goal of DCMA is to automatically review data based on the tool that DCMA is developing rather than having manual reviews. Attributes are identified for each guideline and tested for PASS/FAIL, with the threshold for PASS being 60% of the attributes for that guideline passing. Attributes are met through being able to produce

testable data. The tool being envisioned should allow DCMA to implement more targeted and efficient compliance reviews that focus on high risk areas. Dave showed testing results with the prototype Turbo tool where it found significantly more (19) DRs than the compliance team that reviewed the pilot program.

Other items - DCMA Operations names Shane Olsen to be EVM Division Director. Public release of DCMA FY2014 review schedule, discontinuance of the EVMS AA and LOA, release of DCMA compliance review instruction update, EVMS Surveillance Pilot at LMA Fort Worth.

In the absence of AAs, the DACO will provide system validation, and the record will be in the C-BAR (?). For organizations with corporate systems, DCMA would like the company to provide the corporate system description along with any local tailoring when they perform reviews.

13. Beth Ann Killoran presented the DHS Quarterly Program Accountability Report (QPAR). Her office was established in response to program failures, and is responsible for independent assessments of programs. Beth discussed their analytical approach, stakeholders, evolution of the QPAR over the last two years, and how the agency uses the report to support program portfolio budgeting decisions.
14. Mellissa Gilbert provided the Clearinghouse Working Group update. The Group wants to do an "all call" to identify where industry believes the collision point is between Agile and EVMS; people with an interest should contact Melissa Gilbert.
15. Neil Albert intends to get the draft IBR guide out in April.
16. Dale Gillam announced that he is helping coordinate the update to the surveillance guide and is looking for volunteers.
17. Dan Lynch facilitated a panel with Emily Kose of Raytheon and Dr. Jennifer Long of Naval Air Systems Command, USN to discuss their partnering on the JSOW C-3 program. Dr. Long is Chief Systems Engineer for the Joint Stand-Off Weapons System program. Emily noted that on this program the customer is invited to monthly cost and schedule reviews, and that this helps build a strong team relationship. Discussed metrics, use of IMS and SRAs, and other components of data sharing that help the team monitor progress. Special note made by Emily that the level of tool automation is key to reducing the effort required to support EVM data integration and analysis. She also noted that Agile approaches pose a significant challenge to traditional EV measurement because of the frequent changes in prioritization of capability development. Dr. Long highlighted that it is important to measure technical performance measures as well as EVM in order to get a more accurate picture of actual program progress.
18. Lt. Col. David Abba provided an Operators Perspective, discussing his viewpoint on the intersection between operators and the acquisition community. The presentation had several highly evocative video elements that can be accessed from the slides.
19. Note: These minutes are intended to supplement the charts shown during the presentations (as applicable). Charts (with some exceptions) will be uploaded to the PMSC website shortly after the meeting