

# NDIA IPMD Surveillance Guide Revision

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# Topics

- **Key Takeaways**
- **Core Working Group Members**
- **Table of Contents**
- **Lessons Learned**

# Key Takeaways

- **100s of hours dedicated since February 2014**
- **Guide has been significantly revised**
- **26 pages down to 15**
  - With additional focused appendices with example material
- **Available after this meeting for electronic voting**
- **New appendix (“D”) being created**
  - Very detailed checklist to support Surveillance Reviews
  - Will be voted on separately – potentially at August meeting

# Surveillance Guide Working Group

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- **1 Introduction**
- **2 Organizational Surveillance Activities**
- **3 Project Surveillance Review Activities**
- **4 Customer Considerations**
- **5 Appendix A – Example Surveillance Plan Structure**
- **6 Appendix B – Example Quantification of Factors to Select Projects**
- **7 Appendix C – Examples of Project Artifacts for Review**

- **1 Introduction**
  - 1.1 Overview of Surveillance
  - 1.2 Definitions
  - 1.3 Purpose of the Guide
  - 1.4 Surveillance Responsibility

- **2 Organizational Surveillance Activities**
  - 2.1 Establish and Maintain the Organization’s Surveillance Plan
  - 2.2 Define Review Scope and Select Projects for Surveillance Reviews
    - 2.2.1 Define Review Scope
    - 2.2.2 Select Projects
  - 2.3 Establish the Project Surveillance Review Team
    - 2.3.1 Attributes of Review Team Members
    - 2.3.2 Training of Review Team
  - 2.4 Oversee Surveillance Reviews
  - 2.5 Learn from Results of Surveillance Reviews

- **3 Project Surveillance Review Activities**
  - 3.1 Plan for the Review
    - 3.1.1 Assign Review Team Responsibilities
    - 3.1.2 Schedule the Project Surveillance Review
    - 3.1.3 Plan for Subcontractor Surveillance
    - 3.1.4 Notify the Project of the Review
    - 3.1.5 Analyze Artifacts Prior to Project Interviews
  - 3.2 Conduct the Surveillance Review
  - 3.3 Deliver the Formal Surveillance Review Report
  - 3.4 Root Cause Analysis and Corrective Actions by the Project Team



# Table of Contents – Section 4 & Appendices

- **4 Customer Considerations**
- **5 Appendix A – Example Surveillance Plan Structure**
- **6 Appendix B – Example Quantification of Factors to Select Projects**
- **7 Appendix C – Examples of Project Artifacts for Review**

# Lessons Learned

- **Updating an NDIA guide is an epic experience**
- **Everyone has opinions and most people are passionate about their point of view**
- **Need to have a single “book boss” to take ownership**
- **What existed in the previous version doesn’t really matter – it’s a disservice to just try to tweak it**
  - Tried hard to stay respectful to what was there
  - Realized it was a product of a group effort and things were just there
- **Need to own every word, term, point, etc., in the Guide**
- **Need to consider all input and close the loop – results in a significant amount of work and a better product**
- **If you go all-in, it is a great learning experience as you get to adjudicate the best of the best**