

# NDIA Integrated Program Management Division

**25 August 2015**

*Dan Lynch*  
*Chairman, NDIA-IPMD*

# Agenda

- **IPMD Objectives**
- **Board Member Update**
- **IPMD Update**
- **DoD Operating Environment Update**
- **Working Groups**
- **2015 / 2016 Meeting Schedule**
- **April 2015 Meeting Survey Results**

# IPMD Objectives

- 1. Serve as a thought leader and source of best practices for program performance management.**
- 2. Strengthen trusted relationships with PARCA and DoD oversight agencies and jointly work on EVMS-related policies and activities to achieve approved EVM systems, consistent practices, and no surprises to industry.**
- 3. Sponsor working groups to improve the state of program performance management in specific focus areas such as Production, Planning & Scheduling, and Services and Sustainment.**
- 4. Collaborate across all federal agencies to resolve disparate EVM interpretation and documentation emanating from multiple sources.**
- 5. Collaborate with other NDIA Divisions and professional associations.**

# IPMD Board Members

## Effective June 3, 2015



**Interim Vice Chair:**  
**Sung Soon Stultz**



**Chair:**  
**Dan Lynch**

### Officers at Large



**Neil  
Albert**



**Bill  
Altman**



**Steve  
Barnoske**



**Kathy  
Dailey**



**John  
Duval**



**Buddy  
Everage**



**Dale  
Gillam**



**Kim  
Herrington**



**Yancy  
Qualls**



**Randy  
Steen**



**Sung Soon  
Stultz**



**Joan  
Ugljesa**

### Past Chairs



**Dan  
Butler**



**Gary  
Humphreys**



**Joe Kusick**



**Pete Wynne**

# Now Accepting Nominations for Vice Chair

- **Election: April 2016 Meeting**
- **Eligibility: “a candidate shall have actively served as an IPMD member for a minimum of 2 years and preferably have served as a working group lead”**
- **Company Documented Sponsorship Required**
- **Typically 4 year Commitment – 2 years Vice Chair, 2 years Chair**
  - Chair: Dan Lynch term April 2018
  - Vice Chair: Name TBD April 2016-2018 / Chair April 2018 - 2020
- **All nominations must be received NLT February 4, 2016**
  1. **Nominees to be vetted by Board; candidate selection complete by Feb 5**
  2. **Chair formally requests Company sponsorship/commitment**
  3. **Company provides written agreement to Chair**

# IPMD Update

- **Supported CPM's EVM World in New Orleans**
  - NDIA-IPMD Overview / Clearinghouse Topics Discussion
  - Panel Participant on EVMSIG Discussion
- **Joint Government – IPMD Discussions on Schedule Margin**
  - IPMR DID and the Implementation Guide in final stages of update process. PARCA expects them (with the revised SM wording) to be released by mid-August
- **Interim DFARS Clause...?**
- **Upcoming IPMD Board Strategy Session October 6-7**
  - April/August Meeting Survey Results
  - Confirm / Revise Objectives

# DoD EVMS Update

- **DCMA Surveillance/Compliance Pilots continue**
  - ✓ **GD Electric Boat, Lockheed, Raytheon, Textron, BAE-UK (LMCO subcontractor)**
  - ✓ **Panel discussion later today**
  - ✓ **Additional effort underway for UN/CEFACT XML capability for data feed/read**

- **Gordon Kranz retirement from OSD...**



### Authorities/Initiatives

As described in the August 10, 2011 Ashton Carter memo, "Earned Value Management (EVM) Systems Performance, Oversight, and Governance", PARCA is responsible and accountable for EVM performance, oversight, and governance across the Department. Specifically:

- EVM Policy and Guidance Ownership
- [EVM Central Repository \(EVM-CR\)](#) Management
- Integrated Product Team (IPT)/Stakeholders Coordination
- EVM Data Requirements Review and Approval
- DoD EVM Interpretation and Issue Resolution Facilitation
- EVM Competency Management



*(Photo allegedly taken during IPMR adjudication discussions)*





# Working Group Overview

- **EVMS for Agile Development**
- **Civilian Agency Industry Working Group (CAIWG)**
- **Program Management**
- **Clearinghouse**
- **Guides Steering Group**
- **Planning & Scheduling**
- **Prime and Subcontract Management**
- **Services & Sustainment**
- **Contracts** 

*Participants Welcome!!*

## Overview

**Focus on the application of EVM in an Agile development environment. The group works to advance the understanding and use of Agile and EV to increase the probability of program cost, schedule, and technical success.**

## Leadership



**Kathy Dailey**

**Co-Chair Open**

- **Forum to exchange views and information and provide guidance and direction for projects that use Agile development methodology and EVM**
- **Contribute to efforts defining optimal Agile/EV practices**
- **Highlight successes and failures and provide a information on the use of Agile and EV**
- **Current subgroups include Data Dictionary, WBS/IMS, Change Management & Data Analysis**
- **Guide describing the application of EVMS in an Agile development environment in subgroup areas**
- **Guidance will be released in interest areas as available**

# Civilian Agency Industry Working Group

## Overview

Provides a forum for open exchange of government and industry views on performance based management systems including EVMS.

<http://caiwg.mycpm.org/>

## Leadership



**Jerry Jones**  
jerry.jones@faa.gov

**Neil Albert**  
nalbert@mcri.com

## Objectives

- ✓ Promote and share project management and performance measurement best practices across the government
- ✓ Provide government agencies with information for improved Cost/Schedule Management across the government
- ✓ Develop and maintain a Reciprocity Agreement for EVMS Acceptance between government agencies
- ✓ Develop and maintain a document that outlines EVMS Scalability opportunities for Small Projects, Universities, Non-Profits
- ✓ Maintain a website with information that is shared across the government
- ✓ Sponsor initiatives across the government that helps to improve cost and schedule management

# PM Working Group

## Overview

**Objective is to broaden the focus and membership of the IPMD to share best practices among program management professionals and discuss methods and tools in addition to earned value management**

## Leadership



**Bill Altman**  
altmab@battelle.org



**Connie Dowler**  
connie.dowler@lmco.com

- **Meets monthly on 3<sup>rd</sup> Wednesday @ 2PM ET for 1 hour via telephone**
- **Developed IPMD brochure and PowerPoint overview on IPMD for use at selected venues**
- **Identifies PM oriented topics and speakers for IPMD meetings**
- **Manages IPMD LinkedIn site – Industry only; >650 members**
- **Predictive Measures Guide**
- **Working engagement with NDIA SED, Aug meeting panel discussion “Managing Program without an EVM Requirement”**

## Overview

A forum for industry's EVMS practitioners to raise and discuss EVMS implementation issues. The goal is to identify common issues, gather facts and supporting data, formulate industry positions, and develop recommendations for resolution.

## Leadership



**Pete Wynne**  
peter.a.wynne@lmco.com



**Gary Humphreys**  
ghconsult@aol.com

- Maintain repository of EVMS issues and Interpretative guidance
- Clearinghouse Charter, Process, and Submission Forms Located on the IPMD website

<http://www.ndia.org/Divisions/Divisions/IPMD/Pages/WorkingGroups.aspx>

# IPMD Guides Steering Group

## Overview

Maintain the five OMB recommended IPMD Guides as well as other IPMD guides to reflect the latest changes in the EVMS Standard (EIA-748) policies and regulations as well as lessons learned and advancements in best practices for integrated program management

## Leadership

Dan Butler (co-lead)  
Daniel.E.Butler@raytheon.com

Jeff Poulson  
jeff.poulson@raytheon.com

Randy Steeno  
randall.r.steen@boeing.com

Joan Ugljesa (co-lead)  
jugljesa@newvistasgroup.com

- All IPMD Guides are on a mandatory three year review cycle
- The Guides Steering Group:
  - Launches and supports working groups to update the guides every three years
  - Advises IPMD Board of changes in policy or regulation that need to be immediately incorporated into one or more guides
  - Accepts out of cycle change requests to determine best course of action (appropriate and warranted, immediate update required or can hold for next regular update)

Guide	Update Lead	Status
Intent	Mike Cuticchia, Jeff Poulson	Reaffirmation Version C update published April 2014
IBR	Neil Albert	Revision 2 published March 2015
Surveillance	Dale Gillam	<b>Revision 2 approved &amp; published July 2015</b>
Application	Guides Steering Group	Revision 2 published January 2015
Acceptance	Buddy Everage	Revision 1 published March 2013 <b>Revision 2 for 2016; B. Everage to Lead</b>
PASEG	Planning and Scheduling Working Group	Version 2.0 published June 2012 Version 3 update in process – current plan: <ul style="list-style-type: none"> <li>• Distribute to membership for review in Dec</li> <li>• Vote at January 2016 meeting</li> </ul>
Predictive Measures	Program Management Working Group	First edition published September 2014
Agile	Earned Value Management for Agile Programs	Version 1.0 will be published 4 <sup>th</sup> Quarter 2015

Note: Current published guides have been updated to reflect the change from PMSC to IPMD as well as change from “ANSI/EIA-748” to “EIA-748”

## Overview

Serves as a collaborative environment between industry and government agencies for the exchange of views and information regarding planning and scheduling (P&S) processes including EVMS, that will provide for common understanding, guidance and direction.

## Leadership



**Carla Gilhuys**

Carla.Gilhuys@ngc.com



**Yancy Qualls**

yqualls@humphreys-assoc.com

- **Maintain the Planning and Scheduling Excellence Guide (PASEG) for use by both Industry and Government Agencies**
  - <http://www.ndia.org/Divisions/Divisions/IPMD/Documents/PASEG/>
- **Resolve common issues related to improving P&S policy and practices**
- **Provide Planning & Scheduling guidance and expertise to the IPMD**
- **Update PASEG by August 2015**



## Overview

Objective is to address the needs and challenges of both Prime Contractors and Subcontractors within the DoD Industry. This working group will address contractual and execution performance issues with an emphasis on integration and flow down that may exist at the Prime and Subcontractor level.

## Leadership



Caroline\_M\_Cremisi@raytheon.com

Anna Blachman

- **Output** - Based on the inputs provided by both the industry and government, the working group will prepare a white paper which will address the major issues / concerns around EVMS Flow-Down, Compliance, Integration and Timing.

## Overview

Investigate and document the useful application of EVM concepts to contracts containing sustainment work (O&M, Services, and other work typically treated as Level of Effort) for the purpose of improving stakeholder assessments of performance.

## Leadership



**Jason Miller**  
Jason.W.Miller@boeing.com



**John Duval**  
jduval1@csc.com

- Formulate recommendations on policy
- Include tailoring recommendations, implementation approaches, training material, and best practices
- Researched other industries to gain better understanding of processes

# Contracts Working Group

## Overview

Focus is to get alignment between the contract management organization and Integrated Program Management (IPM) practitioners, with emphasis on EVM and project scheduling practices, and on interpretation of requirements as it relates to contractual application of these practices

## Leadership



**NDIA IPMD  
SME**



**NCMA Contracts  
SME**

- **Establish a Formal Channel of communication between NDIA-IPMD, NDIA's Procurement Division, and the National Contract Management Association (NCMA)**
  - Quarterly / Semi-Annual Meeting
  - Discussion of Learning Opportunities
  - Collaboration Meetings
- **Develop a set of educational materials and provide training at various venues**

- **NDIA IPMD Upcoming Events**

- **2015**

- Aug 25-26, Westin, Crystal City
- Oct 6-7, IPMD BoD Strategy, San Diego
- Nov 16-18, IPM Workshop, Marriott, Bethesda, MD

- **2016**

- Jan 26-27, Lockheed-Martin, Orlando, FL
- April TBD, SAP, King of Prussia, PA
- August TBD, Pratt & Whitney Hartford, CT

- **Sponsor(s) needed for 2017**

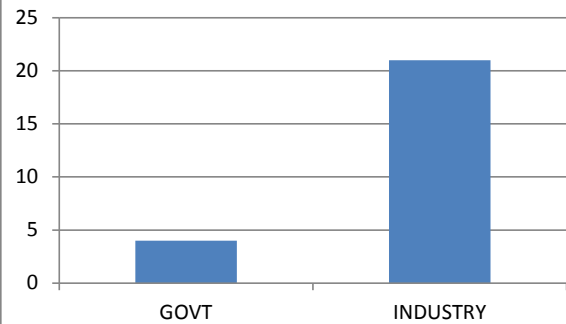
**NDIA**  
**Integrated Program Management Division**

**25 August 2015**

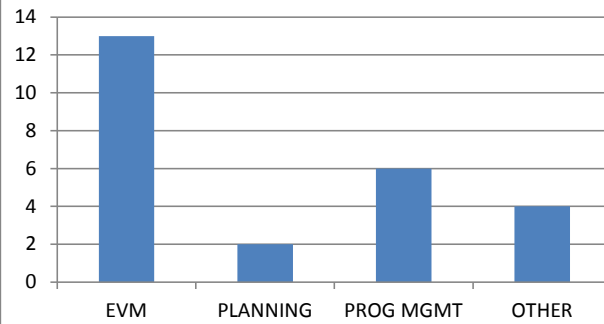
***April 2015 Meeting***  
***Survey Results***

**Dan Lynch**  
**Chairman, NDIA-IPMD**

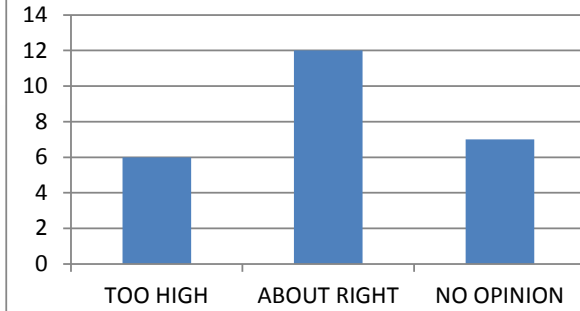
## Respondents



## OCCUPATION



## COST OF REGISTRATION



- CEO
- COMPLIANCE
- BUSINESS OPS MGR
- ALL OF ABOVE!

"This was my first time attending. I have no way of determining a reasonable cost basis."

"The cost didn't seem to be an issue with my management."

"Air Travel and hotel are the big fixed cost drivers for most people who attend the meeting."

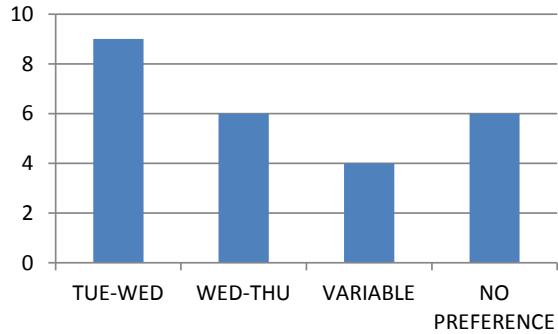
"...I was charged for the 1st day even though I called to cancel. This should be revised when making group rate agreements..."

"It was free for me, so no complaint."

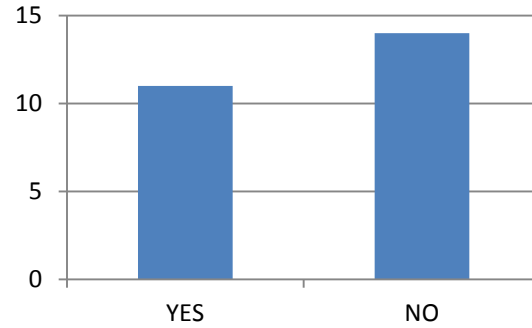
"A little higher than expected and meals were on your own..."

**Dan Lynch**  
Chairman, NDIA-IPMD

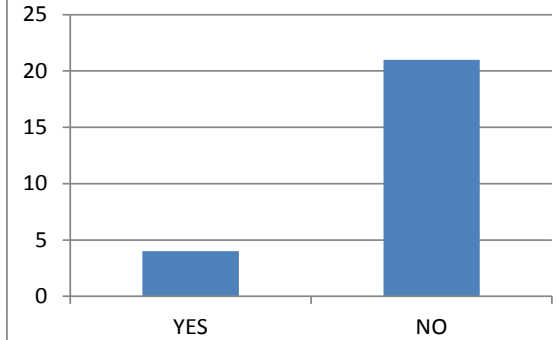
**PREFERRED DAYS**



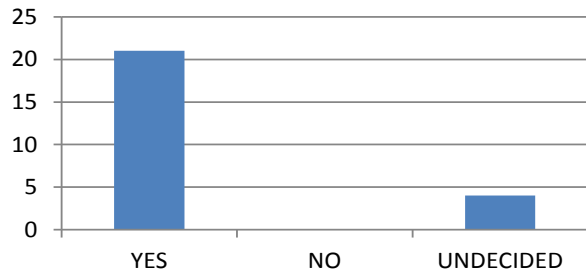
**LOCATION MATTER?**



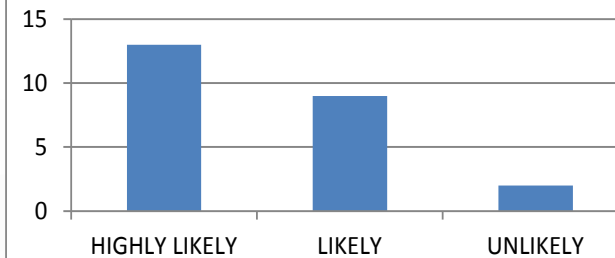
**FIRST IPMD MEETING?**



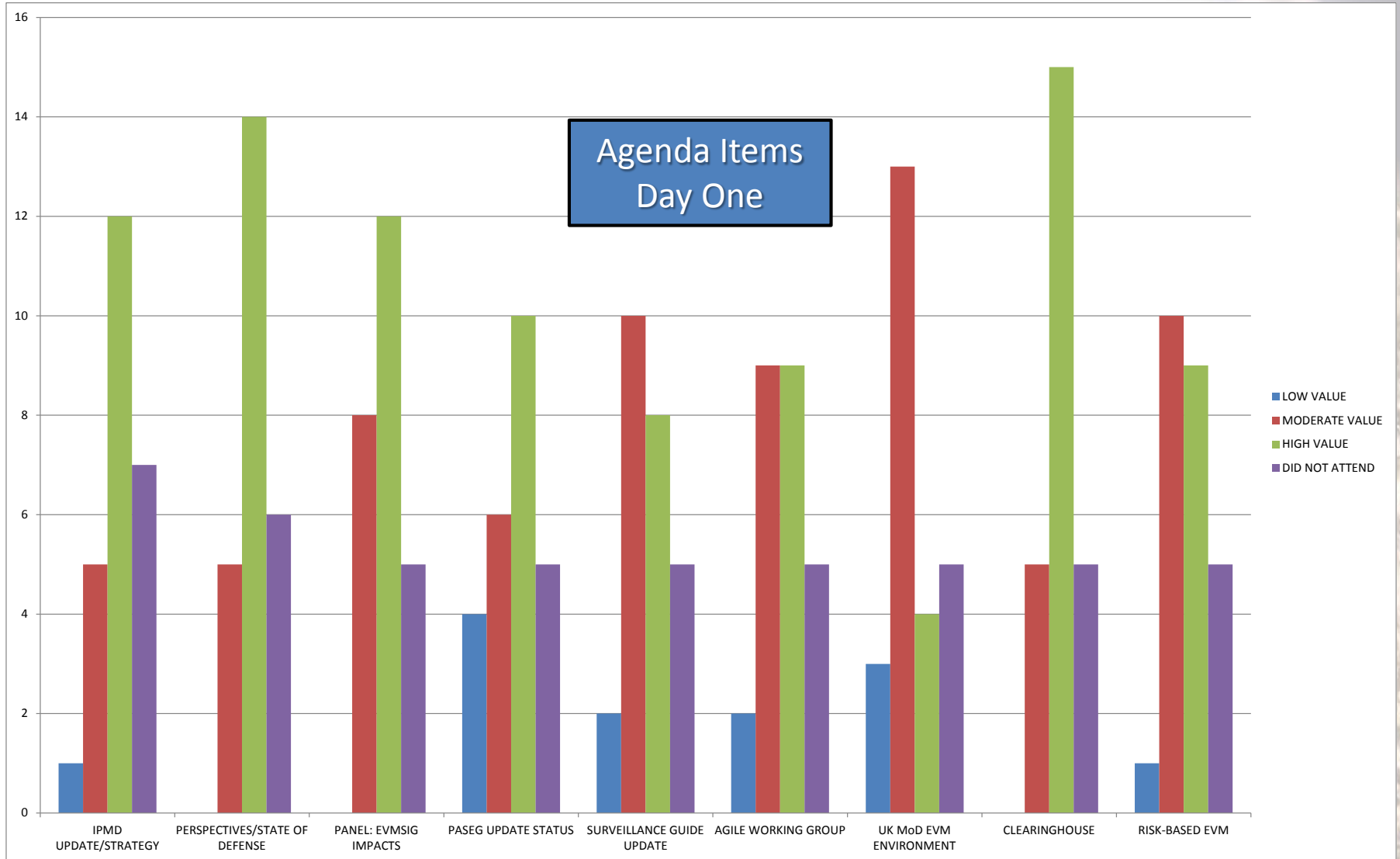
**ATTEND FUTURE EVENTS?**



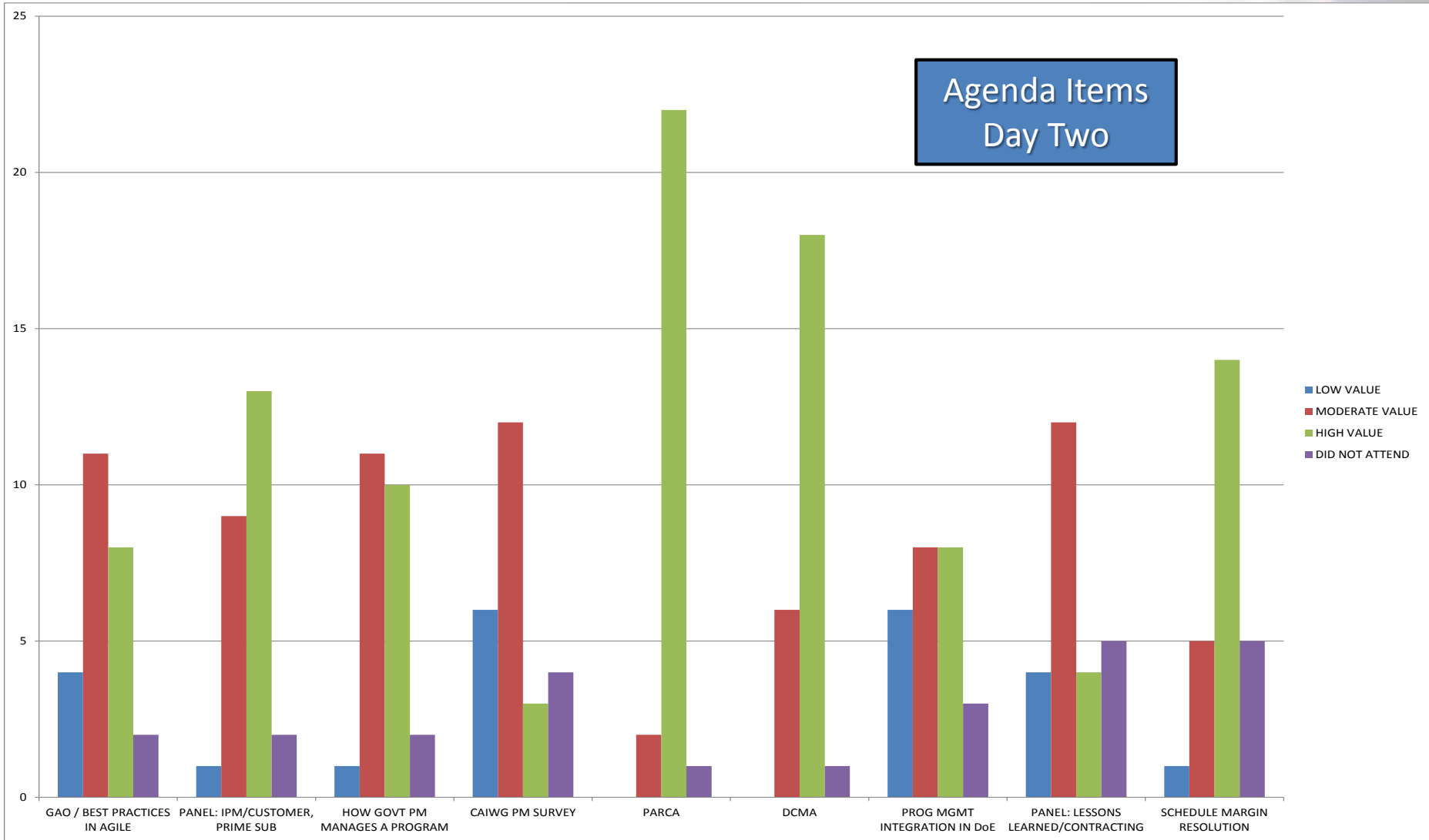
**LIKELIHOOD OF RECOMMENDING**



**Dan Lynch**  
Chairman, NDIA-IPMD







## Specific suggestions for improving the event:

- *“Continue to provide a mix of IPM, EVM, and scheduling”*
- ***“Organize panel around certain topics and time the questions/responses”***
- *“The event was well run and provided much useful and appropriate information”*
- *“Better quality presentations and speakers. While the topics are often interesting and valuable, the speakers and their presentations are a bit dry making it difficult to stay engaged”*
- *“Continue to encourage the Civilian agencies to support and attend these meetings”*
- *“End around 3PM on the last day so people can leave to make flights – that happens anyway but the agenda doesn’t”*
- ***“Expand membership to younger participants with new ideas”***
- ***“Make a concerted effort to get new folks, especially from non-EVM disciplines to attend. Also, want to highlight ways to make the new folks feel welcome so they’ll come back. Also, consider efforts to get younger/mid-career people to participate and/or speak”***
- ***“Have a predetermined set of topics for panels and approach them in a logical order”***
- ***“The panels were great, I suggest more panels, but maybe the head of PARCA and DCMA, taking questions about the future of EV”***
- ***“Panel limited to 60 minutes, individual speakers limited to 45 minutes”***

## General Comments:

- *“More medium sized companies should host these meetings. Surprised that some disapproved site companies don’t attend the meeting to gain insight into solutions to their issues”*
- *“I thought the presentations by Encore Analytics and Amazon were informative”*
- *“Still haven’t found the right formula for attracting Program Managers to the meetings. The Program Management presentations are good, but few in the audience can relate to the topics”*
- *“I think having the participants go on their own for lunch is fine. I didn’t hear many complaints. Additionally, I feel charging a nominal fee for attendance is not a bad idea”*
- *“By keeping PARCA or DCMA to the end may help keep the audience there to the end”*
- *“If some of the people had known there was no PARCA meeting on Thursday, I feel a LOT more would have left right after the DCMA presentation”*
- *“There appear to be a lot of initiatives and many people on the Board. It’s be good to have insight into how the board members align with initiatives so that I can figure out who best to talk to on specific topics”*
- *“I appreciate this survey as it communicates you’re looking at ways to improve. It’d be good to hear how this survey information is incorporated to improve the events and the board’s activities”*

# Takeaways

PARCA and DCMA presentations are highlights of the meeting

Panel discussions are effective and informative, but require more structure and discipline

Membership needs to get younger with greater diversity

Registration fee NOT a driver for attendance, nor are sponsored lunches or social hour

Location not a significant driver for attendance