

NDIA Integrated Program Management Division

13-14 April 2016

Dan Lynch
Chairman, NDIA-IPMD

Agenda

- **Board Member Updates/Election**
- **IPMD Update / Activities**
- **Working Groups**
- **2016 / 2017 Meeting Schedule**

IPMD Board Members

Effective April 12, 2016



Vice Chair:
Dale Gillam

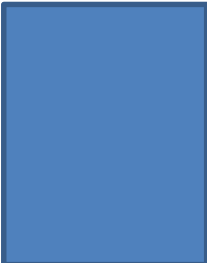


Chair:
Dan Lynch

Officers at Large



Neil Albert



Vacant



Steve Barnoske



Kathy Dailey



John Duval



Buddy Everage

Past Chairs



Dan Butler



Gary Humphreys



Mary Ann Hale



Kim Herrington



Yancy Qualls



Randy Steeno



Vacant



Joan Ugljesa



Joe Kusick



Pete Wynne

Candidates for Vice Chair & Officer At Large

- **Election: TODAY!**
- **Vice-Chair**
 - Dale Gillam running unopposed; Company (SAIC) documented sponsorship received
 - 4 year Commitment – 2 years Vice Chair, 2 years Chair
 - Chair: Dan Lynch term expires April 2018
 - Vice Chair: April 2016-2018 / Assumes Chair with Board approval: April 2018 - 2020
- **Officer At Large**
 - Nominees vetted by Board 3/15
 - Mary Ann Hale GD
 - Gerry Becker Harris
 - Steve Hickman Rolls Royce
 - Dan Bellovary Rolls Royce

IPMD Update / Activities

- **Supporting EVM World Naples, FL June 1-3**
- **Joint Government – IPMD Discussions on Future Reporting**
 - Broader application of expanded Format 7
 - Potential to eliminate Formats 1-4 XML and be utilized for DCMA Data Driven Surveillance
- **Revised IPMD Charter**
 - Complete and signed off 31 March 2016 ([Charter](#))
- **IPMR Implementation Guide**
 - Published February 5, 2016 (AUW / Schedule margin)
- **Memorandum on Contractor Cost and Software Data Reporting (CSDR) and Earned Value Management (EVM) Co-Plan**
 - Released 18 March 2016 ([memorandum](#))
 - Updated DD Form 2794
 - Merges CSDR with IPMR reporting requirements; allows viewable comparison to maximize consistency

IPMD Update / Activities

- **DPAP Memorandum on DoD Source Selection Procedures**
 - Released 1 April 2016 ([Source Selection](#))
- **DPAP Memorandum: Guidance on Using Incentive and Other Contract Types** ([Incentive](#))
 - Released 1 April 2016
- **CAPE/PARCA CSDR-EVM Co-Plan Memorandum**
 - Released 18 March 2016 ([Co-Plan](#))
- **Recent PARCA Issue Resolutions Submitted**
 - IPMR DID revision...”discrete effort impacting LOE tasks”
 - IPMR DID language for COM change to “per contractor’s existing systems”
 - EVMSIG GL27 interpretation/expectation for Format 1 Block 6.c.1. (MLEAC)

IPMD Update / Activities

- **IPMD Board Strategy Session March 15-16**

- Agenda / Discussion Points

- Vice-Chair / At-Large Board Member Vetting
- Scalability Guide (CAIWG) – study underway to include as an NDIA Guide
- Program Management Guide Update
 - Provided the Program Management Working Group a table of contents for their discussion at their meeting on 3/16
 - John McGregor is thinking about publishing a related guide within PARCA. The intent of the guide is to better draw the connections between the various practices and other pieces that exist.
 - Further discussion related to the fact there are several organizations, government and industry, working related topics. The takeaway was that we need to figure out how to align and integrate the efforts as much as we can. We do not have much leverage over the government, but should focus on coordinating across industry.
- April Meeting Status
- Future Format 7 / PARCA-DCMA Pilot Activity
- Working Groups Initiative
 - Reinvigorate efforts/results/reporting
- 2017 Meeting Location Targets
 - EcoSys; DC
 - Northrop Grumman; So Cal
 - Textron; DC
 - Rolls Royce; IN

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**
- **CSDR**

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
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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



Vaughn Schlegel

Need

- Meets monthly on 3rd 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



Steve Barnoske

Steven.k.Barnoske@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)
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Jeff Poulson
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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)

April 2016 Guide Status and Updates

Guide	Update Lead	Status
Intent	Mike Cuticchia, Jeff Poulson	Reaffirmation Version C update published April 2014 – <i>up for review in 2017</i>
IBR	Neil Albert	Revision 2 published March 2015
Surveillance	Dale Gillam	Revision 2 published July 2015
Application	Guides Steering Group	Revision 2 published January 2015
Acceptance	Buddy Everage	Revision 1 published March 2013 <i>Up for review – Revision 2 update begins at April 2016 meeting</i>
PASEG	Planning and Scheduling Working Group	Version 2.0 published June 2012 <u>Version 3 update: vote at April 2016 meeting</u>
Predictive Measures	Program Management Working Group	First edition published September 2014 – <i>up for review in 2017</i>
Agile and EVM	Agile Working Group	Revision 1: <u>vote at April 2016 meeting</u> Anticipate there will be regular updates to this guide as the working group incorporates additional content

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

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Yancy Qualls

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- **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 Cremisi
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
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John Duval
jduval1@CSRA.com

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

CSDR Working Group

Overview

Focus is to establish communication between CAPE and NDIA IPMD practitioners, with emphasis on the pending changes to the Cost Reporting DIDs.

Draft

Leadership



Randy Steeno
co-lead



James Taylor
co-lead

- **Establish a Formal Channel of communication between NDIA-IPMD and CAPE/DCARC**
 - Keep NDIA IPMD current on the changing environment and reporting requirements from CAPE
 - Provide industry comments on draft DIDs from CAPE
 - Consider Collaboration Meetings
- **Assess the need for any additional IPMD documents regarding CSDRs**
 - Will investigate / look at what educational materials may be needed for IPMD members to assist them in complying with the new Flexfile requirements
- **Team will monitor the new PARCA/CAPE Co-Plan pilot initiative.**

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, on interpretation of requirements as it relates to Contractual Application of EVMS

Leadership



Lisa Wolf, MBA, PMP, EVP
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Jean Lohier, CPCM, CFCM
jean.lohier@att.com

- **Goals:**
 - **Establish a Formal Channel of communication and collaboration between NDIA-IPMD and the National Contract Management Association (NCMA)**
 - Quarterly / Semi-Annual Meeting
 - Discussion of Learning Opportunities
 - Collaboration Meetings
 - **Develop a set of collaboratively produced educational materials and provide training at various venues**
- **Unique Construct:**
 - **Partnering with 'outside' experts in this domain (aka NCMA) to obtain balanced view**

Award Program

Name of Award	<i>“NDIA IPMD Distinguished Service Award”</i>
Criteria Eligibility	Significant contributions to IPMD NDIA member
Recipient Nominations Approval	Individual, possible small group via NDIA IPMD BoD 2/3 vote from BoD
Frequency	as appropriate
Award Program coordinators	John Duval & Dan Butler

- **NDIA IPMD Upcoming Events**
 - **2016**
 - Jun 1-3, EVM World Naples, FL
 - August 30-31, Pratt & Whitney Hartford, CT
 - **Sponsor(s) needed for 2017**
 - See any member of the Board
 - Stressing Spring & Fall in DC Beltway