

NDIA IPMD Government and Industry Day Notes

April 14, 2016

Newtown Square, PA | Hosted by SAP

Note: These notes are intended to supplement the charts shown during the presentations (as applicable). Charts (with some exceptions) will be uploaded to the IPMD website shortly after the meeting.

1. Welcome: Mr. Dan Lynch, IPMD Chair, called the meeting to order at 8:06 and welcomed all the attendees. Mr. Lynch thanked SAP for sponsoring the meetings and the networking event last night. Mr. Lynch reviewed the agenda for both days. As is the committee's normal practice, all attendees introduced themselves.
2. Sponsor Overview and Welcome: Mr. Jim Davis provided the initial welcome and an overview on SAP. SAP partners with Dassian to bring more focus on integrated program management and EVM. Mr. Davis shared an insightful video that highlighted a successful partnership between SAP and a contractor to support end customers.
3. NDIA IPMD Update: Mr. Dan Lynch went over the NDIA IPMD status. IPMD board members update: Ms. Sung Soon Stultz and Mr. Bill Altman have retired. Mr. Dale Gillam is the new Vice Chair effective on 4/13/16. Mr. Lynch identified the one Board position open for election and shared appreciation for the four candidates. Mary Ann Hale was elected to the Board. The Agile and EVM Guide and the PASEG were approved. IPMD Update: Supporting EVM World and recognized Wayne Abba as the CPM President; Highlighted the ongoing Format 7 discussions with PARCA; the IPMD Charter has been revised; a number of memorandums and documents have been published recently (specifics and the links are in the slides). Mr. Lynch shared the important focus on Working Groups and the expectation that more accountability will be incorporated to generate results. Mr. Lynch shared a number of details regarding the importance of the Working Groups and in reenergizing the value and output. Mr. Lynch reinforced the important role of leading a Working Group and generating results as being the right path to potential roles on the Board. Future IPMD Meetings: Mr. Lynch walked through the planned hosts for future meetings and solicited others to considering hosting these important meetings.
4. PARCA Opening: Mr. John McGregor shared his thoughts in regards to effective data management with the goal of delivering the needed data once to serve the various needs related to decision making, quality, reporting, and compliance. Mr. McGregor shared his thoughts regarding the existing IPMR Format 5 report and the goal to evolve the approach to view Format 5 as a process to facilitate communication between stakeholders vs. a report submitted for EVMS compliance. Mr. McGregor also shared his thoughts regarding the evolution of the Format 7 data and reporting. Mr. McGregor shared his thoughts regarding the potential integration of the various research studies (Essential Views and Program Signature). Mr. McGregor is going to work through the process to get these studies released to the public.
5. JSCC Update: Mr. Ivan Bembers provided an update on the Joint Space Cost Council (JSCC) initiatives. The key topics included more emphasis on scheduling practices, the integration of Agile and EVM that has been occurring in the intelligence community for ~10 years, the Better EVMS Implementation Study, the cost of deferred maintenance of an EVMS, the important role of having clarity on who owns the EVMS within an organization, and the cost drivers of EVMS.

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The details of the Better EVMS Implementation Study will be shared at EVM World 2016. If interested in attending the next JSCC meeting to get information on the Better EVMS Implementation Study, contact Mr. Bembers.

6. Navy Center for EVM: Mr. Dave Tervonen shared insight on the Navy's roles, responsibilities, and initiatives of the Navy's Center for EVM.
7. NASA Update: Mr. Jerald Kerby shared insight on NASA's EVMS activities. The key topics included increased EVMS thresholds, reciprocity, FAR supplement updated, documentation updated, validation approach, and surveillance. Mr. Kerby shared the experience of offering contractors the opportunity to retroactively apply the higher thresholds to existing contracts, which would remove the formal requirement. The offer included the expectation that there would be payment to the government for the associated cost savings. Interestingly, no contractor has taken advantage of the offer, which could be interpreted as there not being a material incremental cost of EVMS over other project management practices, or perhaps that contractors prefer to do EVMS vs. give money back to the government.
8. Planning and Scheduling Panel: Mr. Neil Albert facilitated the panel on planning and scheduling. The panelists were Mr. Ivan Bembers, Mr. Dan Goldsmith, Mr. Rick Price, Mr. Brian Valenti, and Mr. Yancy Qualls. Key topics were:
 - a. Characteristics of a successful partnership between government and industry
 - i. A common area that can use improvement is clearly defining assumptions associated with planning and scheduling
 - ii. Its key to get the stakeholders together as soon and frequently as possible to align expectations
 - iii. Getting clarity on any government furnished anything (GFX) and the dependencies of it with the contractor tasks in the schedule
 - iv. Defining tasks codes and schedule data elements
 - v. A collaborative environment and open communication
 - b. LOE in an IMS
 - i. Some panelists like LOE in the IMS and some do not
 - ii. There are valid arguments to have LOE in the IMS and not including it
 - iii. If in the IMS, the LOE work needs to be clearly identified
 - iv. With some CAMs and program teams, it can be helpful to have LOE in the IMS as they look for it there (vs. making them go to a separate system) and it can tighten the link for staffing planning
 - v. If in the IMS, the LOE should not drive discrete work and needs to be handled correctly (e.g., in accordance with the EVMS, not drive the critical or driving paths)
 - c. The "right" level of detail for a production IMS
 - i. Whatever level you need it to be at for effective management
 - ii. If the MRP system has the needed control and detail, then the information in the IMS can be at a higher level

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- iii. In some instances, the production work is a subset of a larger developmental effort. In this instance the production work needs to be detailed to the level needed for effective integration.
- d. Integrating a subcontractor schedule
 - i. Three key options
 - 1. Load the entire subcontractor's IMS into the prime
 - 2. Load the very highest level points of summarization of the subcontractor's IMS into the prime's IMS
 - 3. Using a representative model that is in the middle of the two extremes
 - ii. Challenges with any of the options
 - 1. The prime becomes responsible for the details of the subcontractors content
 - 2. If too high of a level, this limits the ability to do SRAs
 - 3. Alignment of IMS practices, calendars, and tools
 - iii. Formal flow down requirements for the prime is an important consideration on how best to integrate the subcontractor's IMS.
 - iv. An observation was shared that for some primes, the focus of EVMS by the CAMs is on the prime's labor and not equally on the integration and management of subcontractors. The prime and the CAMs need to take ownership of the subcontractor's schedule and manage effectively.
 - v. Need to have great oversight of the subcontractor's IMS practices and the quality of the content.
- e. Resource loading an IMS
 - i. There has to be a way to link resources to baselines and forecasts. There is a premium with doing this correctly in the IMS. It can be done in a separate tool as long as the link to the IMS is maintained.
 - ii. It can be helpful in leveling resources and adjusting the time phasing of work that is planned.
 - iii. Managing resources in the IMS and in a separate tool can inject the risk of differences between the data in the different tools.
 - iv. A panelist encourages to load the resources for the baseline to provide an initial budget value for initial planning.
 - v. A comment from the audience was made regarding proposal support and the need to often load resources in the IMS to give timing insight in the pricing details.
- 9. PARCA Update: Mr. John McGregor provide insight on specific PARCA initiatives. The key topics are the DFARS update, EVMS Reciprocity, PARCA EVM and Agile Guide, Format 7, CSDR/EVM Co-planning, and a number of Guidance Questions that have been submitted:
 - a. Reprogramming columns in the IPMR are cumulative (i.e. once values are in there, they stay)

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- b. COM/FCCM will be add or non-add in the IPMR
 - c. The program manager's most likely EAC in the IPMR can be different than block 15. If different, then they need to be explained in Format 5.
 - d. The definition of "current rates" in the EVMSIG is often an area of questions submitted to PARCA. This will be addressed as part of the clarification effort for the EVMSIG.
 - e. A program office submitted a question related to lagging subcontractor data causing the prime to be delinquent in reporting. The intent is for the government to hold the prime accountable and then it's the prime's responsibility to hold the subcontractors accountable.
 - f. As IDIQ contracts are modified, they are to transition from the old IMS and CPR DIDs to the IPMR DID.
10. IPMD Working Group Updates:
- a. Agile and EVM:
 - i. Dr. Ann Marie Oien shared that the Agile and EVM Guide has been approved. There is a list of topics to be worked for potential incorporation. Mr. Gordon Kranz has volunteered to lead a subgroup focused working through those topics.
 - b. Clearinghouse:
 - i. Mr. Gary Humphreys highlighted the topics discussed in the Working Group.
Additional
 - 1. EVMSIG update
 - 2. Timephased ETCs
 - 3. System Descriptions
 - 4. For smaller and medium size companies, the issue of what do they do since they do not have a dedicated DCMA lead
 - ii. An industry survey is being led by John Duval to collect insight from industry that will help shape areas of focus for the Clearinghouse.
 - c. Contracts:
 - i. Mr. Jean Lohier provided an outbrief with the key points captured in the associated slides. Mr. Lohier highlighted the importance of engaging government participants and the unique partnership between NDIA IPMD and NCMA in leading this Working Group. Mr. Lohier invited interested people to consider joining NCMA Tysons (which has ~1,600 members) and assisting in the cross education of the IPM and contracting communities.
 - d. CSDR:
 - i. Mr. Randy Steeno provided an outbrief with the key points captured in the associated slides.
 - e. Planning and Scheduling:
 - i. Mr. Yancy Qualls shared that the primary focus for the Working Group the past two years has been on the PASEG revision and Schedule Margin guidance. With

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the Guide revision approved and Schedule Margin guidance in place, the Working Group is tackling new topics (e.g., LOE, Agile and Scheduling guidance).

- f. Prime/ Subcontractor:
 - i. Ms. Caroline Cremisi provided an outbrief with the key points captured in the associated slides.
 - g. Program Management:
 - i. Mr. Vaughn Schlegel recently volunteered to lead the Working Group. The Working Group started discussions on a PM Handbook and this could be a useful product.
 - h. Services and Sustainment:
 - i. Did not meet.
 - i. Surveillance Guide:
 - i. The Surveillance Guide was approved in 2015. A subset of the Working Group has continued to meet to create a best practice checklist to support the Surveillance Guide. Marty Doucette has done the creation of and heavy lifting on the draft checklist. Dan Bellovary has done a significant amount of piloting and provided feedback on the checklist. The feedback from others in the Working Group and an IPMW presentation have reinforced the value of the checklist. Recognizing the evolution of the checklist largely depends on the fine tuning of the DCMA surveillance metrics and details, the Working Group will be suspended for a period of time as those metrics and test steps continue to evolve. Marty and Dan will share the current checklist and pilot experiences at EVM World 2016.
 - j. Systems Acceptance Guide:
 - i. Mr. Buddy Everage shared that the Working Group to revise the Guide kicked off on 4/13. Additional participants are needed. If interested in participating, contact Mr. Buddy Everage (beverage@mcri.com).
11. DCMA Update: Mr. Shane Olsen and Mr. Russ Rodewald shared an update on DCMA activities. The slides provide the specific topics.
12. Summary and Adjournment: Mr. Lynch adjourned the meeting at 5:02pm.