NDIA Integrated Program Management Division

Winter Meeting
January 31 – February 1, 2017
Orlando, FL
(Joint Industry/Government Day)

Dan Lynch
Chairman, NDIA-IPMD

www.ndia.org/divisions/IPMD

Agenda

- ~~Mission and Objectives~~
- Activities
- Working Groups
- Communications Initiative
- Meeting Schedule

IPMD Board Members

Vice Chair: Dale Gillam

Chair: Dan Lynch

Officers at Large

Neil Albert

Steve Barnoske

Dan Bellovary

Kathy Dailey

John Duval

Buddy Everage

Mary Ann Hale

Kim Herrington

Yancy Qualls

Randy Steeno

Joan Ugljesa

Past Chairs

Dan Butler

Gary Humphreys

Joe Kusick

Pete Wynne

- **IPMD Division-wide Sessions in 2016**

    o January 26-27 (Orlando), April 16-27 (SAP), August 30-31 (P&W)

- **IPMD Strategy Sessions in 2016**

    o March 15-16 (Raytheon), July 12-13 (GD-MS), November 2-3 (IPMW)

    o Conducted Joint Session with PARCA & DCMA July 13, August 29, November 2

- **Supported EVM World Naples, FL June 1-3 2016**

- **Supported IPM Workshop Bethesda, MD Oct 31 – Nov 2 2016**

- **Joint Government – IPMD Discussions on Future Reporting**

    o Broader application of expanded Format 7 (aka IPMR[2])

        o Potential to eliminate Formats1-4 XML <u>and</u> be utilized for DCMA Data Driven Surveillance

IPMD Board Strategy Session November 2-3

- **Agenda / Discussion Points – Highlights**
  - **DCMA**
    - The final CAR authority has been pulled back to Olsen/Rodewald
    - The SSI and CRI are being updated
    - Agile – follow your System Description
    - DCMA does not recognize third party certifications
    - DCMA <u>has</u> been asked to do surveillance on three programs under $100M by the government program offices
  - **PARCA**
    - Format 7 (PARCA considering new name (e.g. $IPMR^2$)
    - Formats 5 & 6 also under consideration
    - IPMD to resurrect the XML WG as "Data Exchange WG" (Ugljesa)
  - **IPMD**
    - Clearinghouse WG to have "Government Liaison" (Rodewald)
    - Created Data Exchange WG (Ugljesa)
    - Suspended Services and Sustainment WG
    - Created Newcomers WG (Lynch, Gillam leads)
    - Created Benchmarking WG (Duval, Everage leads)
    - Increase focus on "Financials" with NDIA (Everage)

- **Program Management**
- **Agile and EVM**
- **Planning and Scheduling**
- **Contracts**
- **Prime and Subcontract Management**
- *Benchmarking*
- **Civilian Agency Industry Working Group (CAIWG)**
- **CSDR**
- *Data Exchange*
- **Clearinghouse**
- ~~Services & Sustainment~~
- **Guides Steering Group**
- *Newcomers*

Participants Welcome!!

Overview/Mission:

Broaden the focus and membership of the IPMD to influence acquisition policy and share best practices among program management professionals.

Leadership:

Vaughn Schlegel
Vaugh.m.schlegel@lmco.com

Gerry Becker
Gerry.Becker@harris.com

Objectives:

- **Recommend the formation of additional IPMD working groups to address a range of topics essential to successful program execution**
- **Increase program manager participation in IPMD by broadening meeting topics appropriately**
- **Develop program management guides/white papers as appropriate**
- **Provide advocacy for risk/opportunity management issues**
- **Develop joint DoD Program Management best practices handbook**

Agile and EVM Working Group - Charter

Overview/Mission:

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
Kathy.Dailey@GDIT.com

AnnMarie Oien ("AMO")
Annmarie.oien@lmco.com

Objectives:

- **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, Strategic Backlog and Contracting for Agile and EVM**
- **Guide describing the application of EVMS in an Agile development environment in subgroup areas**
- **Coordinate activities with other industry groups**
- **Guidance will be released in interest areas as available**

AFEI nTsa PSA WID

Planning and Scheduling Working Group - Charter

Overview/Mission:

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

Objectives:

- **Maintain the Planning and Scheduling Excellence Guide (PASEG) for use by both Industry and Government Agencies**
- **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**

Contracts Working Group – Charter

Overview/Mission:

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
wolf_lisa@bah.com

Jean Lohier, CPCM, CFCM
jean.lohier@att.com

Objectives:

- **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**

Prime/Sub Contract Management Working Group - Charter

Overview/Mission:

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

Amanda McNanley
amanda.mcnanley@rolls-royce.com

Objectives:

- **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.

NDIA — National Defense Industrial Association

Overview/Mission:

Establish a new benchmark(s) for correlating cost drivers and best efforts of maintaining an EVMS for programs and projects of various complexity.

Leadership:

John Duval
John.Duval@CSRA.com

Buddy Everage
beverage@hbeconsultingsolutions.com

Objectives:

- Conduct surveys of industry contractors to discover the should cost for EVMS maintenance for mature EVMS implementations
- Focus on outputs that will be beneficial to government and industry allowing both to better understand the financial impact that may lead to more successful and realistic negotiations for the cost of maintaining an EVMS

AFEI nTSA PSA WID

Civilian Agency Industry Working Group (CAIWG) - Charter

Overview/Mission:

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

Products / Initiatives:

- EVM Reciprocity Agreement and Civilian Agency Reciprocity Board
- EVM Scalability Guide
- Cost and Schedule Management Best Practices
- IPM Guidebook
- "Program Management Improvement and Accountability Act (PMIAA)"

Tasks and Due Dates:

- OMB Capital Programming Guide Update
- Exploring the relationship between EVM and Agile Development with GAO, OSD-PARCA, and OMB
- Work with OMB on PMIIA definition and implementation – follow up with civil agencies
- Instantiation of the EVM Reciprocity Working Group
- Evaluating the emerging Technology Business Management footprint - monitoring IT Shared Services, implementation best practices, and improvements across the FITARA scorecard

Concerns and/or Collaboration:

- This is a Government/Industry working group for collaboration purposes only.
- FACA perceptions/realities are avoided

Other Notable Points:

- Meet quarterly with or shortly after NDIA IPMD Committee Meetings
- Strategic Partners: GAO, OMB, DOD-PARCA, FAI
- Active Civilian Agencies: NASA, VA, DOE, FAA, DHS, USDA, NSF
- Number of People Who Participated: 75 Invitees
- Number of People Who Regularly Participate: 25- 30
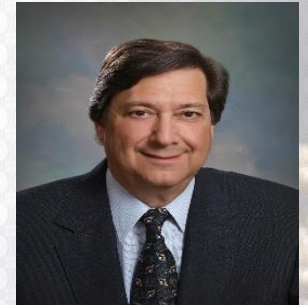- 2017 Year-to-Date Hours: TBD

CSDR Working Group - Charter

Overview/Mission:

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

Leadership:

Randy Steeno
randall.r.steeno@boeing.com

Neil Albert
nalbert@nfaconsulting.com

Objectives:

- **Establish a Formal Channel of communication between NDIA-IPMD and CADE/DCARC Focus Group**
  - **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 CADE Cost & Technical Data reporting**
  - **Will investigate / look at what educational materials may be needed for IPMD members to assist them in complying with the new Flexfile & Technical Data requirements**
- **Team will monitor the new PARCA/CAPE Co-Plan pilot initiative.**

IPMR DID Data Exchange Working Group - Charter

Overview

Short term effort to facilitate PARCA and DCMA transition to a *DoD owned data exchange format* for next revision of the IPMR DID (EVM-CR) as well as DCMA compliance/surveillance activities

Leadership

Industry
Joan Ugljesa (NVG), Keith Fisher (Raytheon), Mark Jamieson (GD-MS), "CJ" Cherilyn Jones (LM)

DoD
EVM-CR, PARCA, Navy:
John McGahan, Alex Walter, Melissa Gudger, Beau Willis

- **Intent is to conclude work effort as quickly as possible (spring/summer 2017) to facilitate the next revision of the IPMR DID**
  - Revision focuses on the schedule and cost performance data requirements instead of describing the content of paper based forms
- **Migrate from the UN/CEFACT XML Schema and data exchange instructions (DEIs) to a simpler data interchange format (JSON) and business rule DEIs**
  - JSON structures are based on arrays and records – intended for the purpose of exchanging data
  - Collection of data tables to convey schedule and cost performance data in a software neutral format
  - Reflect lessons learned from ANSI X12 and UN/CEFACT XML standards development processes

Clearinghouse Working Group Charter

Overview/Mission:

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:

Joe Kusick
Joe_Kusick@Raytheon.com

Gary Humphreys
ghconsult@aol.com

Objectives:

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

Note:

- *Russ Rodewald will participate as Government liaison!!*

IPMD Guides Steering Group – Charter

Overview

Maintain the set of IPMD Guides to reflect the latest changes in the EVMS Standard (EIA-748), related government 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

Mary Ann Hale
MaryAnn.Hale@gd-ms.com

Randy Steeno
randall.r.steeno@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	Guides Steering Group	Reaffirmation Version C update published April 2014 – *up for review in 2017* *Begin EVMS Standard reaffirmation process*
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 2 published September 2016
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016
Predictive Measures	Program Management Working Group	First edition published September 2014 – *Up for review in 2017*
Agile and EVM	Agile Working Group	Revision 1 published in April 2016 Revision 1.1 – on schedule for vote to approve at April 2017 IPMD meeting
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 published November 2016

Newcomers Working Group - Charter

Overview/Mission:

To welcome and introduce first time attendees to the IPMD during a pre-meeting evening social event to enhance their engagement during the Working Group breakout sessions and have a discussion on IPMD activities and initiatives

Leadership:

Dan Lynch
Daniel_L_Lynch@Raytheon.com

Dale Gillam
Dale.E.Gillam@saic.com

Objectives:

- **To provide a forum for newcomers or people who have not participated in the IPMD in a while to discuss IPMD activities and initiatives**
- **To discuss specific actions the IPMD can take to better engage newcomers and have them return**
- **To collect fresh perspectives from newcomers on the IPMD experience and how things can be improved to better support the IPMD mission and objectives**

- **Board initiative underway to improve communications across internal and external stakeholders**

- **Example activities within the Board – Telecom meeting every two weeks**
  - Identify specific initiatives with leads and objectives, report out progress
  - Detailed agenda distributed in advance of meetings to structure conversations; capture the notes and actions in the same file
  - Hold periodic in-person strategic planning meetings
  - Inventoried the IPMD Working Group SharePoint sites, cleaned up content, updated user material and distributed to Working Group leads
  - Maintain IPMD web site with assistance from NDIA

- **Working Groups and Membership**
  - Push frequent emails out to membership with info for meetings or volunteer needs
  - Collection and analysis of meeting feedback by Board
  - Rotating Working Groups present updates at the Board meetings
    - ✓ Intent is to keep the Working Groups results oriented and operating consistently, provide help when needed
  - Tie the Working Groups to sessions and tracks at EVM World and the IPM Workshop

- **NDIA leadership and external stakeholders**
  - PARCA and DCMA participate in sessions at the strategic planning meetings
  - Provide point papers to NDIA leadership
  - Submit common industry or other issues to the PARCA EVM Interpretation and Issue Resolution web site
    - ✓ Examples: recommendations for updates to the EVMSIG, IPMR DID, IPMR Implementation Guide
  - Submit articles on IPMD initiatives and Working Groups to CPM's *The Measurable News* and NDIA's *National Defense Magazine*
  - Work closely with CPM to have strong IPMD presence at the IPM Workshop

- **Established points of contact for partners and agencies**

CPM – Lynch	MDA – Lynch	DOE / EFCOG – Everage	Navy - Albert
FAA – Everage	Air Force – Albert	DHS - ??	
Army – Albert	NASA – Steeno	DAU - Albert	
PARCA – Lynch	DCMA – Humphreys/Hale	IC / JSCC – Kusick	
NDIA Sys Eng – Dailey	NCMA - Gillam		

2017 IPMD Meeting Schedule

- **IPMD Board Meeting – January 30**
- **IPMD Winter Meeting – January 31 – February 1 (*Deltek* / Orlando)**
- **IPMD BoD Strategy Session – March 7 – 8 (Raytheon / San Diego)**
- **IPMD Board Meeting – April 25**
- **IPMD Spring Meeting – April 26 – 27 (*Northrop Grumman* / Fairfax)**
  - Register now: http://www.ndia.org/meetings/7PM2
- **IPMD BoD Strategy Session – Summer (TBD)**
- **IPMD Board Meeting – Fall (TBD)**
- **IPMD Fall Meeting – September 2017 (*Artemis* / TBD)**

- ***Need sponsors for 2018!***