EVMS for Agile Development 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

Co-Chair Vacant

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, Complete Agile, Contracting, Strategic Roadmap, Agile / EV Checklist and Training
- 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

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

Thanks to AMO for all her contributions to the EVMS for Agile Development Working Group, she will be missed.

Annual Business Rhythm

| | January | April | July | October |

NDIA IPMD Board
NDIA IPMD Meetings
Review new Guide

Review

Publication Vote on New Version

Confirm new/existing subgroups & selected products from strategic roadmap

Agile EVM Working Group
Working Group Coordination
Subgroup new material generation
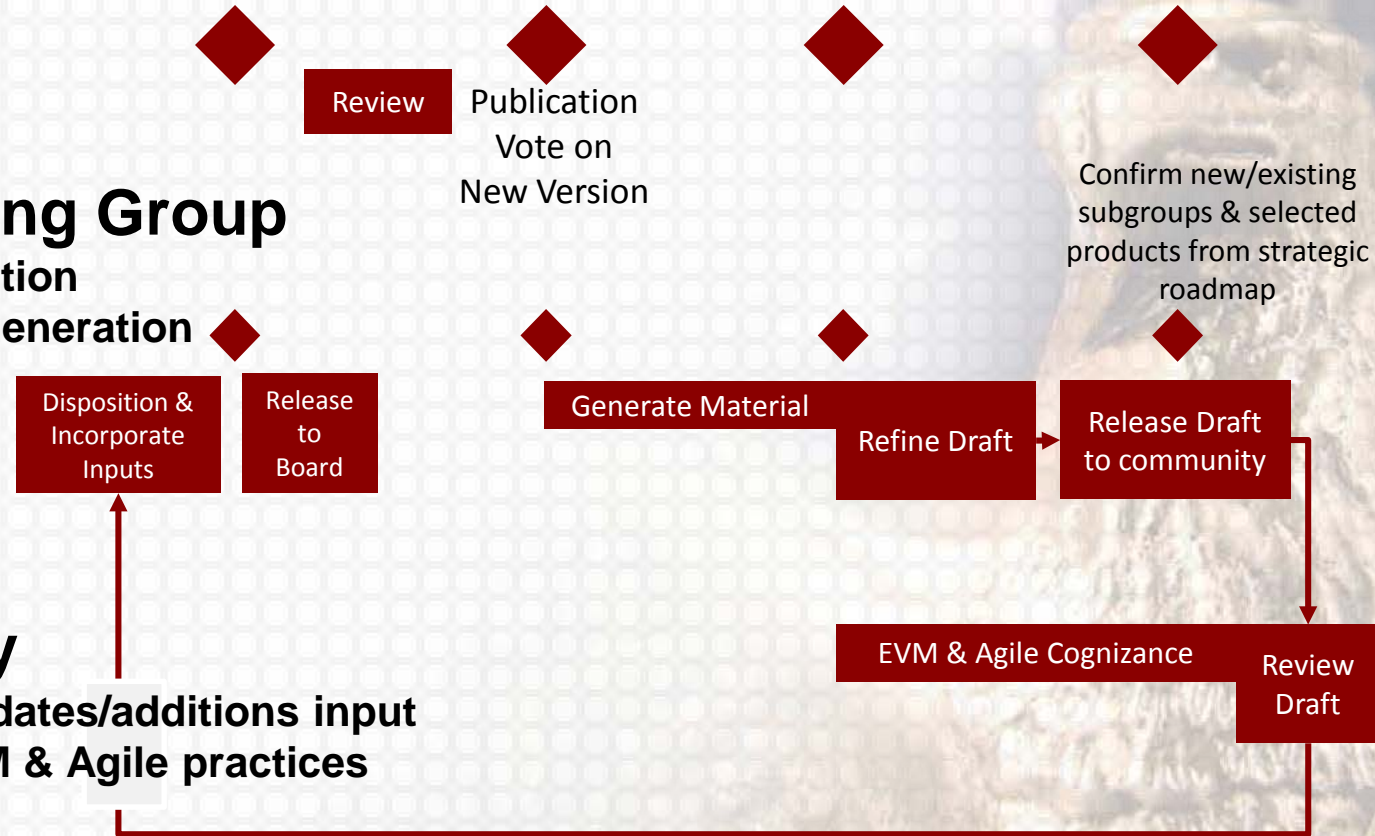**Subgroup review**
community inputs

Disposition & Incorporate Inputs

Release to Board

Generate Material

Refine Draft

Release Draft to community

NDIA Community
Review draft, provide updates/additions input
Cognizance of latest EVM & Agile practices

EVM & Agile Cognizance

Review Draft

Version 1.1 Changes

- Added Appendix D: Product Roadmap, Release Planning, and Rolling Wave Planning Products
- Updated document to align with PARCA Desktop Planning Guide
- Responded to community comments to provide clarifications throughout guide
- Refined/Clarified Sections
  - Data Dictionary
  - Agile Program Planning Section
  - Agile EVM Performance Measurement Baseline (PMB)
  - Structures for Performance Metrics
  - Managing Baseline Change on Agile Programs
- Change matrix released with document

- Final version sent to IPMD Membership for vote at the April IPMD meeting
- Two comments moved to the Version 1.2 backlog

DCMA			5.5	Rolling Wave Planning Package Breakout. The contractor may want to allow programs to detail plan agile development work held in planning packages inside the current reporting period (irrespective of the contractor's Freeze Period).	Incorrect/recommend removing statement. The contractor system must define the "agile freeze period" if it differs from the standard freeze period. That freeze period must also be contained within a structured and defined execution process. Any text which states "irrespective of the contractors" defined process is incorrect and is extremely poor advice from a compliance point of view.	This is a critical concept for agile planning. Remove the irrespective part. New text: Rolling Wave Planning Package Breakout. ~~The contractor may want to allow programs to detail plan agile development work held in planning packages inside the current reporting period (irrespective of the contractor's Freeze Period).~~ Allowing programs to wait until after the planning meeting is held for the next increment of work before finalizing the detailed plan should minimize changes once the work has started. A typical agile business rhythm holds the planning meeting for the next increment of work at the end of the current increment, just prior to the start of the next increment. The decomposition of scope from planning packages to work packages is not a change to the baseline and is not subject to the change control rules required by the freeze period. Once work packages are defined and budgeted, controls must be established to minimize further changes to budgets, schedule, or scope of work. It is acceptable to decompose planning packages and create work packages inside the current period for work that has not yet started. The detail plan must be approved prior to the start of the work, and such an approach must be compatible with the contractor EVM System Description.	Done - Part moved to 1.2
	28						
DCMA		5.5		"Based on the allowances in the EVMSIG, it is acceptable to detail plan work inside the current period for work that has not started. The detail plan must be approved prior to the start of the work, and such an approach must be compatible with the contractor EVM System Description." The passage is not quite what we intended with the EVMSIG.	Edit passage; two concepts here..... The EVMSIG encourages continuous planning processes with the use of a freeze period to stabilize the PMB prior to the start of work. The EVMSIG does not define that period of time, allowing for flexibility towards planning cycles and battle rhythm. Secondly, changes within that period must still be controlled. The detail planning should be completed as part of the defined planning process. Other changes within the freeze period must be prior to work start, and in accordance with change control processes (the EVMISG limits this to customer directed/rate changes/EPAs, etc.). Recommend rewording along the lines of "The EVMSIG encourages continuous planning to decompose work at the earliest practical time and the establishment of a freeze period to instill baseline stability. It does prescribe a freeze period as part of the process, but allows that to be shorter than the typical current plus one month approach. While the EVM SD or change control procedures should dictate the process to be used, the EVMSIG does not prohibit a freeze period that is within the current period."	Changed all occurrences to Budget at Completion. Revise Language	
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Version 1.2

EVMS for Agile Working Group – 2017 Task Plan and Status

Products /Initiatives:

- **Update Industry Practice Guide for Agile on Earned Value Management Programs**
  - **Version 1.1 Comment Adjudication**
  - **Industry Best Practices**
- **Release Adjudicated Version 1.1 to IPMD Board and then General Membership**
- **Conduct Vote on Version 1.1 NLT April**
- **Begin Development of Version 1.2**
- **Maintain Strategic Roadmap**
- **Develop Relationships with Other Industry Organizations with Similar Interest**

Tasks and Due Dates:

- **Maintain IMS/WBS, Change Management, and Data Dictionary Sections in Version 1.2**
- **Product Roadmap Subgroup to Maintain Strategic Roadmap and Backlog**
- **Contracting Subgroup to Develop New Section for Contracting with Agile/EV**
- **Complete Agile Cycle Subgroup to Develop New Section**
- **Develop Agile/EVM Checklist & Agile Metrics – EVM Forecasting**
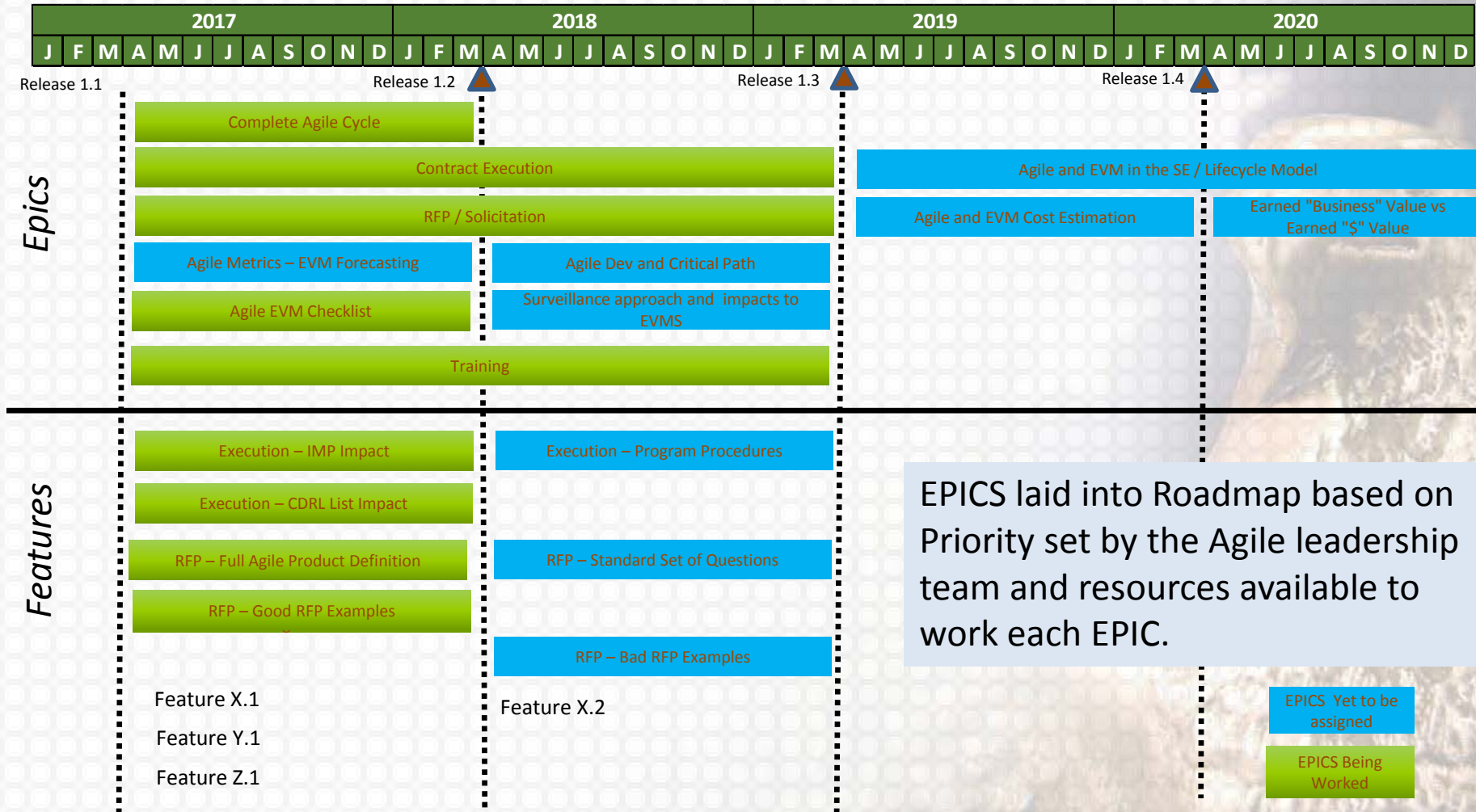- **All Subgroups to Follow Business Rhythm**

Concerns and/or Collaboration:

- **Getting Industry Group Cooperation, May Need Introductions**
- **Need coordination between IPMD working groups**

Other Notable Points:

- **Training Subgroup established to begin June 2017**

NDIA EV Agile Product Roadmap

	2017	2018	2019	2020
	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D

Release 1.1   Release 1.2 ▲   Release 1.3 ▲   Release 1.4 ▲

Epics

- Complete Agile Cycle
- Contract Execution
- Agile and EVM in the SE / Lifecycle Model
- RFP / Solicitation
- Agile and EVM Cost Estimation
- Earned "Business" Value vs Earned "$" Value
- Agile Metrics – EVM Forecasting
- Agile Dev and Critical Path
- Agile EVM Checklist
- Surveillance approach and impacts to EVMS
- Training

Features

- Execution – IMP Impact
- Execution – Program Procedures
- Execution – CDRL List Impact
- RFP – Full Agile Product Definition
- RFP – Standard Set of Questions
- RFP – Good RFP Examples
- RFP – Bad RFP Examples

Feature X.1

Feature Y.1

Feature Z.1

Feature X.2

EPICS laid into Roadmap based on Priority set by the Agile leadership team and resources available to work each EPIC.

EPICS Yet to be assigned

EPICS Being Worked

See Agile EVM Guide Version 1.1 Product Roadmap Example

Complete Agile Cycle Subgroup – 2017 Task Plan and Status

Products/Initiatives:

- Paper will provide examples across program deployment for how you may model agile.
- Lifecycle focused Agile Cycle deep-dive examining the relevant considerations and methods teams can adopt for program control functions (PM & Engineering focuses)
- Build ties to the Systems Engineering group to ensure that we are capturing the 'spectrum' of challenges in SDLC modeled

Tasks and Due Dates:

- JAN/17 - Conduct Kick-off for Subgroup
- JAN/17 – Setup team collaboration space & tools.
- JAN/17 – Team to define 'programs' to use for example models
- JAN/17 – Identify any preliminary 'Agile Software Development Lifecycle' model frame (such as one already promulgated by NDIA or DoD we want to align to for users)
- FEB/17 – Begin drafting (determine 90 day composition timeline from composition start)

Concerns and/or Collaboration:

- POCs for NDIA SE working group
- Working to get 'collaboration' space up and running – ClearPlan may be able to provide.

Other Notable Points:

- Subgroup Lead - Matthew Strain (matthew.strain@caci.com)
- Members – Gordon Kranz, Joshua Garvey, Mike Rocheleau, Scott Fish, Robin Pulverenti, Audrey Mahoney

Agile/EV IBR Checklist Subgroup – 2017 Task Plan and Status

Products/Initiatives:

- **New section in NDIA Guide to EVM for Agile Programs**
- **Section Contents:**
  - **Value proposition statement for Initial (and other) Baseline Reviews**
  - **Reviewers Reference table "checklist"**
    - **highlighting agile related artifacts & processes & the desired attributes of those items that indicate sound planning and executable baseline**
  - **Appropriate level for a section in the NDIA Guide (not extensive "how to" training or handbook)**

Tasks and Due Dates:

- **Release with Version 1.2**
- **Draft for NDIA Agile group review – July 2017**
- **Final for NDIA community review – Oct 2017**

Team:
- Ron Terbush – LM (lead)
- Nathan Oligmueller – NGC
- Tracie Thompson – Honeywell
- Ivan Bembers – NRO
- Reshma Devkaran – CSRA
- Dave Scott – BDO
- Elias Cooper - AzTech

Concerns and/or Collaboration:

- **PARCA initiative currently underway to develop IBR Checklist for Agile Programs – potential collaboration**

Other Notable Points:

- **Desire for IBR guidance document for agile development programs wide-spread across community & Gov't**

Contracting Subgroup – 2017 Task Plan and Status

Products/Initiatives:

- **V1.2 new material**
  - **RFP Guidance**
  - **Execution Guidance**

Tasks and Due Dates:

- **Qtr 4 2016: Team Established**
- **Qtr 1 End 2017:**
  - **RFP Guidance (Full Agile Product, FAR Guideline Reference, Change Control**
  - **Execution Guidance (Sample IMP, CDLR List Impact)**
- **OCT 2017 Release to Community**

Concerns and/or Collaboration:

- **SE Agile Working Group – Contracts**
- **IPMD Contracting Group**
- **IPMD Planning and Scheduling Group**

Other Notable Points:

- **Subgroup Lead – Andrea Nibert**
- **Members – Marilyn Buckelew, Crystal Glenn, Glen Krough, Mike Pelkey, Justin Rogers**
- **Diverse team of NCMA, Government, PM SMEs participating**

Training Subgroup –
2017 Task Plan and Status

Products/Initiatives:

- **Develop training on information in the Guide that could be presented at future EVM Conferences**

Tasks and Due Dates:

- **June 2017 - Training Subgroup Kickoff**
  - **April thru June 2017**
    - **View the Guide**
    - **Start thinking about how we should present the information in a training environment**
- **June 2017**
  - **Develop outline**
  - **Develop product release schedule**

Concerns and/or Collaboration:

- **None**

Other Notable Points:

- **Subgroup Lead Amy Martz**
- **Members**
  - **Jim Duffy, Raytheon**
  - **David Narcum, Northrup Grumman**
  - **Kelly Sele, Raytheon**
  - **Amber Young, AzTech**

Version 1.2 Actions

- **Subgroups working backlog items**
- **Contact Subgroup lead if you want to participate in existing subgroup**
- **Additional subgroups can be created from backlog for interested working group members**
- **Updated working group member and subgroup member list sent with meeting notice**
- **Individuals on the roster not working on a subgroup will be removed from the roster**
- **Members from closed subgroups will be removed from roster**
- **Working group updates are available in IPMD minutes**
- **Subgroup leads will maintain subgroup roster**
- **Contact Kathy Dailey with roster updates**