

NDIA Integrated Program Management Division

*Fall Meeting
September 12-13, 2017
San Diego, CA
Sponsor: Artemis*

*Dan Lynch
Chairman, NDIA-IPMD*

www.ndia.org/divisions/IPMD

Unrestricted Content

Reaffirming what we do and remembering those we do it for



Agenda

- **Board Members**
- **Purpose / Strategic Initiatives**
- **Strategy Session Outbrief**
 - **Activities/Meetings**
 - **Working Groups**

IPMD Board Members



Vice Chair: Dale Gillam



Chair: Dan Lynch

Officers at Large



**Neil
Albert**



**Dan
Bellovary**



**Kathy
Dailey**



**John
Duval**



**Buddy
Everage**



**Mary Ann
Hale**



**Yancy
Qualls**



**Randy
Steen**



**Joan
Ugljesa**

Past Chairs



**Dan
Butler**



**Gary
Humphreys**



Joe Kusick



Pete Wynne

IPM Division (IPMD) Purpose

***Lead the Advancement of
Integrated Program Management
Through Industry and
Government Partnership***

Strategic Themes

Thought Leadership in IPM

Collaboration

Strategic Objectives

Create and Maintain Standards and Guides

Conduct Forums and Meetings to Advance IPM Practices

Provide and Publish Industry Perspective on IPM Topics

Develop a Pipeline of Future IPM Leaders

Develop and Maintain Communications Plan for Key Stakeholders

Engage and Participate with Government and Industry Executive Leadership

Engage and Participate in Other Industry Groups that Foster the Advancement of IPM

Engage and Participate with Academia and Other Educational Entities

Strategic Themes

Thought Leadership in IPM

Collaboration

Create and Maintain Standards and Guides

Develop and Maintain Communications Plan for Key Stakeholders

Update / Complete PM Guide

IPMD BoD to Establish Team and CONOPS

Provide Comments to EVMSIG

Provide Comments to EIA-748

Engage and Participate with Government and Industry Executive Leadership

Refresh Predictive Measures Guide

Finalize Prime/Subcontract Guides

Establish Executive Level CAPE Awareness

Consult / Assist in IPMR Update

Update / Publish Agile Guide (rev 1.1)

Tactical 2017 Objectives

IPMD Update / Activities (1 of 3)

- **2017**

- *Jan 31–Feb 1, 2017 Orlando, FL (Deltek)*
- *Mar 7–8, 2017 San Diego, CA (Raytheon – Strategy Session)*
- *Apr 26-27, 2017 Fair Oaks, VA (Northrop Grumman-no Day 3)*
- *May 31-Jun 2, 2017 EVM World (New Orleans, LA)*
- *Aug 29-30, 2017 San Diego (Raytheon - Strategy)*
- **Sep 12-13, 2017 San Diego, CA (Artemis; incl. Govt F2F at BoD Mtg)**
- Oct 30-Nov 1, 2017 IPMW 2017 (Bethesda, MD)

- **2018**

- January 2018 Orlando, FL (Deltek)
- Spring (April) 2018 Location TBD (BDO)
- Aug-Sep 2018 Ft. Worth, TX (Bell/Textron)

IPM Division (IPMD) Strategy Session Outbrief

- **Agenda / Discussion Points – Highlights (page 1 of 3)**
 - **Review/Update Charter**
 - Acceptance voting cancelled
 - BoD construct to be revised for roles/responsibilities
 - **IPMD Leadership**
 - Gillam to assume Chair at conclusion of Spring '18 Meeting
 - Vice Chair requires identification
 - **Board Membership**
 - One Board position opening for September ballot; election today
 - Two Board positions opening for January ballot; nominations needed
 - Vetting process to be documented (Jan 2018); team established
 - **Working Groups**
 - Progress & productivity being reviewed; BoD to take increased level of direction & oversight
 - **April Survey Review**
 - **Clearinghouse Topics**

IPM Division (IPMD) Strategy Session Outbrief

- **Agenda / Discussion Points – Highlights (Page 2 of 3)**
 - **Strategic Direction**
 - Thought Leadership Area
 - Create & Maintain Standards & Guides
 - Update / Complete PM Guide – *In process; participation dwindling; document being structured, organized; working towards agreement on best practices; plea for contribution specifically from major defense contractors*
 - Provide Comments to EVMSIG – *Provided; Govt/IPMD BoD F2F discussion held 9/11*
 - Provide Comments to EIA-748 – *Working meeting held 8/31 to work provided comments; BoD to review upon completion*
 - Refresh Predictive Measures Guide – *Completed; approval/acceptance being voted on today*
 - Finalize Prime / Sub Guides – *In process; WG and BoD working to provide a panel discussion at January meeting*
 - Consult / Assist in IPMR Update – *Data Exchange WG efforts concluded; DID language in process*
 - Update / Publish Agile Guide (Rev 1.1) – *1.1 published 4/17; 1.2 in process (4/18 target for issuance); draft planned late October*

IPM Division (IPMD) Strategy Session Outbrief

- **Agenda / Discussion Points – Highlights (Page 3 of 3)**
 - **Strategic Direction**
 - Collaboration Area
 - Develop/Maintain Communications Plan for Key Stakeholders
 - IPMD BoD to Establish Team and CONOPS
 - *Communications Team efforts on-going, working in collaboration with NDIA; BoD reviewing Comm. Plan*
 - Engage and Participate with Government and Industry Executive Leadership
 - Establish Executive Level CAPE Awareness – *may be eliminated; limited ability to perform objective*
 - NDIA Systems Engineering Division / NCMA – *Contacts, relationships established; recent attendance at SE Division yearly conference*

Working Groups

- **Program Management** (*Schlegel / Becker*)
- **Agile and EVM** (*Dailey / Strain*)
- **Planning and Scheduling** (*Qualls / Gilhuys*)
- **Contracts** (*Wolf / Lohier*)
- **Prime/Sub Management** (*McNanley / Bridenbaugh*)
- **CAIWG** (*Albert / Jones*)
- **CSDR** (*Steenno / Albert*)
- ~~**Data Exchange**~~ (*Ugljesa*)
- **Clearinghouse** (*Humphreys / Kusick*)
- **Guides Steering Group** (*Ugljesa / Butler / Steeno / Hale*)
- **Community Connection** (*Lynch / Gillam*)

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**

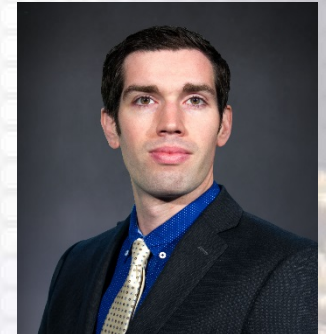
Overview/Mission:

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



Matt Strain
Matthew.Strain@caci.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**

Planning and Scheduling Working Group

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

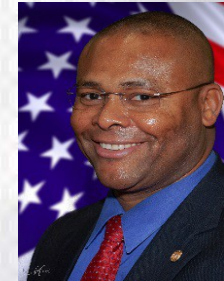
Overview/Mission:

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

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:



Amanda McNanley

amanda.mcnanley@rolls-royce.com



Bill Bridenbaugh

William_Bridenbaugh@Raytheon.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.

Civilian Agency Industry Working Group (CAIWG)

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@nfaconsulting.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

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.steenob@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.

Clearinghouse Working Group

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

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.steenob@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	EIA-748 Reaffirmation Working Group	Reaffirmation Version C update published April 2014 <i>Update in 2018 as part of EVMS Standard reaffirmation</i>
IBR	Neil Albert	Revision 2 published March 2015 <i>Kick off update (Rev 3) at selected 2018 meeting</i>
Surveillance	Dan Bellovary	Revision 2 published July 2015 <i>Kick off update (Rev 3) at Spring 2018 meeting</i>
Application	Guides Steering Group	Revision 2 published January 2015 <i>Minor updates for Rev 3, vote to approve April 2018</i>
Acceptance	Buddy Everage	Revision 2 published September 2016
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016
Predictive Measures	PM Working Group	Revision 2 September 2017 <i>Vote to approve at September 2017 meeting</i>
Agile and EVM	Agile Working Group	Revision 1.1 published in April 2017 <i>Revision 1.2 – Vote to approve April 2018</i>
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 published November 2016
Guides Master Definitions List	Guides Steering Group	May 2017 Revision posted on NDIA web site – updated regularly

Context on the Review and Approval of IPMD Guides and Major Initiatives

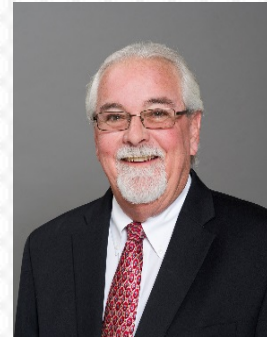
- **Per the IPMD Charter:**
 - All IPMD guides and major initiatives are to be approved by the Board and subsequently provided to the membership for review at least 30 days prior to when the document or initiative is scheduled for vote
- **The IPMD has a specific process that is followed for the review and approval of guides and major initiatives**
 - This process or a subset of this process may also be used for other publications (e.g., White Papers, non-guide products from Working Group) at the recommendation of the Guides Steering Group to the Chair/ Vice-Chair
- **The Vice-Chair maintains the IPMD distribution lists segregating between general membership, voting members, and the Board of Directors (BOD)**

Community Connection Working Group

Overview/Mission:

To welcome and introduce attendees to the IPMD during a pre-meeting evening social event to enhance their engagement during the Working Group breakout sessions and have discussions 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 new or existing members who have not actively 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 all members on the IPMD experience and how things can be improved to better support the IPMD mission and objectives

IPMD 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

Award Program Honorees

Name

Kathy Dailey

Date

Aug 2016

Recognition

Leadership / Agile and EVM WG