

# Integrated Program Management Division

Fall Meeting  
August 28-29, 2018  
Hurst, TX  
Sponsor: Bell

[www.ndia.org/divisions/IPMD](http://www.ndia.org/divisions/IPMD)

Dale Gillam Chairman,  
NDIA-IPMD  
Dale.E.Gillam@leidos.com  
(703) 559-0950

**Reaffirming what we do and  
Remembering those we do it for**

**NDIA**



# Agenda

**NDIA**

- **Board Members**
- **Purpose/Strategic Initiatives/Tactical Actions**
- **IPMD Activities / Meetings**
- **Working Groups**

# IPMD Board Members



Vice Chair: TBD



Chair: Dale Gillam

## Officers at Large



Neil Albert



Dan Bellovary



John Duval



Glenn Fujimoto



Cherilyn Jones



Scott LaFrance



Lisa Manning



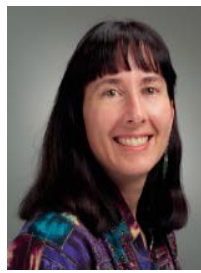
Yancy Qualls



Randy Steeno



Tej Sujlana



Joan Ugljesa

## Past Chairs



Dan Butler



Gary Humphreys



Joe Kusick



Dan Lynch



Tracie Thompson



Pete Wynne

# Slow “Transition” from the Board – Glenn Fujimoto

**NDIA**



**Thank you!**

**IPM Division (IPMD)**  
**Purpose**

**NDIA**

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

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



## 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

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



Strategic Themes

## Thought Leadership in IPM

Create and Maintain Standards and Guides

*Initiate / Create PM Guide*

*Adjudicate Comments to EVMSIG w/PARCA*

*Publish EIA-748-D & Intent Guide*

*Publish Agile & Application Guides*

*Commence Surveillance & IBR Guides*

*Adjudicate Comments to IPMR rev. B w/PARCA*

*Commence PASEG v4.0 efforts*

Tactical **2018** Objectives

## Collaboration

Develop and Maintain Communications Plan for Key Stakeholders

*Establish Communications Plan*

Engage and Participate with Government and Industry Executive Leadership

*Promote relationships with government entities*

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

*Maintain current agreements with existing/new partners (e.g. EFCOG)*



- **2018**

- NDIA-IPMD

- *February 7-8, 2018 Holiday Inn & Suites Orlando, FL (Deltek)*
- *May 2-3, 2018 Hyatt Regency Dulles (Artemis)*
- August 28-29, 2018 (27 & 30 BoD) Hurst Convention Center Ft. Worth (Bell Helicopter)
- October 22-25, 2018 Program Management Track at NDIA-System Engineering Division Conference (Tampa, FL)

- EVM World

- May 30-June 1, 2018 The Westin Ft. Lauderdale, FL

- **2019**

- NDIA-IPMD

- Winter; Feb 6-7, Palm Bay, FL
  - Harris is sponsoring the facility
  - Deltek is sponsoring the food and reception (on the 6<sup>th</sup>)
  - Prime PM is sponsoring the “Community Connection” reception (on the 5<sup>th</sup>)
- Spring; DC Metro Area – Target is Reston, VA
  - Week of April 29<sup>th</sup>
- Early Fall; Denver, CO
  - Week of September 9<sup>th</sup>

- **2020**
  - NDIA-IPMD (targeted locations)
    - Winter; So Cal
    - Spring; DC Area
    - Late Summer; New England / San Antonio

# IPMD Board Meeting – Discussion Points - August 27, 2018



- Meeting Agenda and Presentations Status
- Working Groups Highlights
- Board Election
- Vice-Chair Discussion
- Guides
- 748 Update
- Clearinghouse Topics
- 2019 Meeting Plan
- CPM IPMW Track for NDIA IPMD
- NDIA Collaboration – SE Division
- EVMS as a Business System

# IPMD Board Meeting – Gov't F2F - Discussion Points - August 27, 2018



- A&S Reorganization for PARCA
- IPMR2
  - CA vs. WP level
  - Delivery timeframes
  - Cumulative data vs. current data each period
  - Breakout of burden / non-burden at element of cost
  - Variance reporting
  - Tailoring
  - Three Management EACs (Industry Request)
- EVMIG
- EVMSIG
- Agile Guide
- OTS/OTB Guide
- DCMA update

- **Election/Voting to be held today**
  - 2 At-Large Board Position currently open
    - Candidates:
      - Lisa Hastings
      - Nate Oligmueller
      - Gary Troop
  - Intent Guide
  - Vice-Chair
    - Nominations/Election postponed until ???

## 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

Randy Steeno  
randall.r.steenno@boeing.com

Joan Ugljesa (co-lead)  
jugljesa@newvistasgroup.com

- **Mandatory three year review cycle for all guides – working groups may update guides more frequently**
- **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)**

# August 2018 Guide Status and Updates



Guide	Update Lead	Status
Intent	EIA-748 Reaffirmation Working Group, Guides Steering Group	Reaffirmation Version D pending publication 2018 EIA-748 D update, vote to approve August 2018
IBR	“CJ” Jones	Revision 2 published March 2015 Update in process
Surveillance	Dan Bellovary	Revision 2 published July 2015 Update in process
Application	Guides Steering Group	Revision 3 published May 2018
Acceptance	Buddy Everage	Revision 2 published September 2016
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016 Version 4.0 update in process
Predictive Measures	PM Working Group	Revision 2 published September 2017
Agile and EVM	Matt Strain, Ron Terbush	Revision 1.1 published in April 2017 Revision 1.2 published in May 2018 Revision 1.3 in progress – Draft for review November 2018
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 published November 2016
Guides Master Definitions List	Guides Steering Group	July 2018 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 (e.g. Charter) 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)**

# Agile and EVM WG

## Overview/Mission:

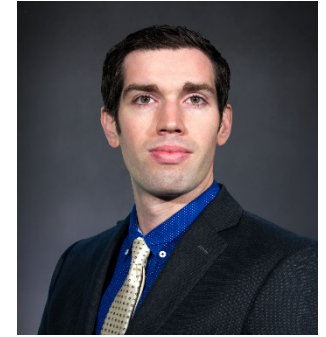
Focus on the application of EVM in an Agile development environment. The group works to advance the understanding and use of Agile and EV to increase the probability of program cost, schedule, and technical success.

## Leadership:



Ron Terbush

Ronald.j.terbush@lmco.com



Matt Strain

Matthew.Strain@caci.com

## Objectives:

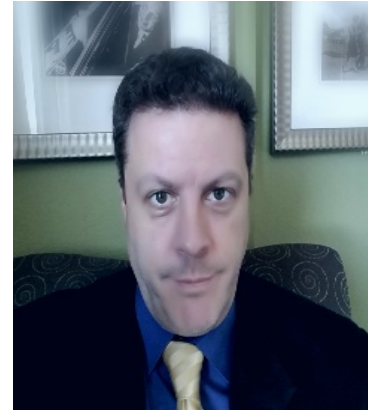
- **Forum to exchange information and provide guidance for projects that use Agile development methodology and EVM**
- **Current Publication:** “An Industry Practice Guide for Agile on Earned Value Management Programs” Version 1.2 - Created to address challenges to EVM on programs implementing agile development techniques
- **Current Guidebook Update subgroups include:** Contracting for Agile and EVM, Agile Metrics, Guidebook Awareness Training and Strategic Backlog for future Guidebook Updates

# Planning & Scheduling WG

## 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:



Scott LaFrance  
Scott.Lafrance@baesystems.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

# Contracts WG

## Overview/Mission:

Focused on aligning the Contract Management and Integrated Program Management (IPM) Practitioners, with an emphasis on EVM and project scheduling practices, and interpretation of requirements as it relates to Contractual Application of EVMS

## Leadership:



Elizabeth Schloer  
Schloer\_Elizabeth@bah.com

New Co-Lead TBD

## Objectives:

- Establish a Formal Channel of communication and collaboration between NDIA-IPMD and the National Contract Management Association (NCMA)
  - Create a guide with best practices for Contract and IPM Professionals to utilize on contracts with EVMS requirement
  - Develop a set of educational materials and provide training at various venue
- Contracts WG Session cancelled for this IPMD Meeting – WG Members should attend the Prime-Sub WG to identify collaboration areas**

We need writers and sub-leads for the WG in a number of areas. If you are interested in joining future WG calls, please reach to Elizabeth

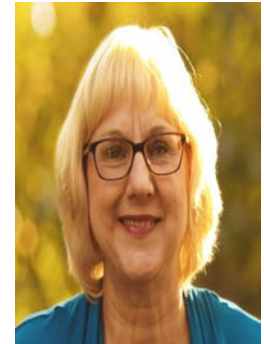
## Overview/Mission:

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:



Karen Frisk  
Karen.frisk@pw.utc.com



Carla Sives  
Carla.Sives@baesystems.com

## Objectives:

- **Output** - Based on the inputs provided by both the industry and government, the working group will prepare a collaboration framework which will address the major issues / concerns around EVMS Flow-Down, Compliance, Integration and Timing.

## 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.steen0@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 WG

## 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

# Program Management WG



## 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



Lisa Hoffman

Lisa.Manning@aarcorp.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



# 21st Annual Systems Engineering Conference

**NDIA**

**October 22-25, 2018**

 **Grand Hyatt Tampa Bay  
2900 Bayport Drive  
Tampa, FL 33607**



**Featuring - Program Management Track**  
**Led by NDIA IPMD**

**[See Event Site for Details and Registration](#)**

**Contact Lisa Hoffman or Vaughn Schlegel  
for details on Current IPMD Participation**

# IPMD Related Speakers at SE Conference **NDIA**

- **John McGregor**
- **Steven Jones (DAU)**
- **Michael Williamson (Reggie Grant)**
- **Gary Humphries**
- **Lisa Hoffman**
- **Vaughn Schlegel**

# NDIA-IPMD Award Program



<b>Name of Award</b>	<b><i>“NDIA IPMD Distinguished Service Award”</i></b>
<b>Criteria</b>	<b>Significant contributions to IPMD NDIA</b>
<b>Eligibility</b>	<b>Any Member, Working Group etc.</b>
<b>Recipient Nominations</b>	<b>Individual, possibly small group via NDIA IPMD BoD</b>
<b>Approval</b>	<b>2/3 vote from BoD</b>
<b>Frequency</b>	<b>As appropriate</b>
<b>Award Program Coordinators</b>	<b>John Duval &amp; Dan Butler</b>

# Award Program Honorees

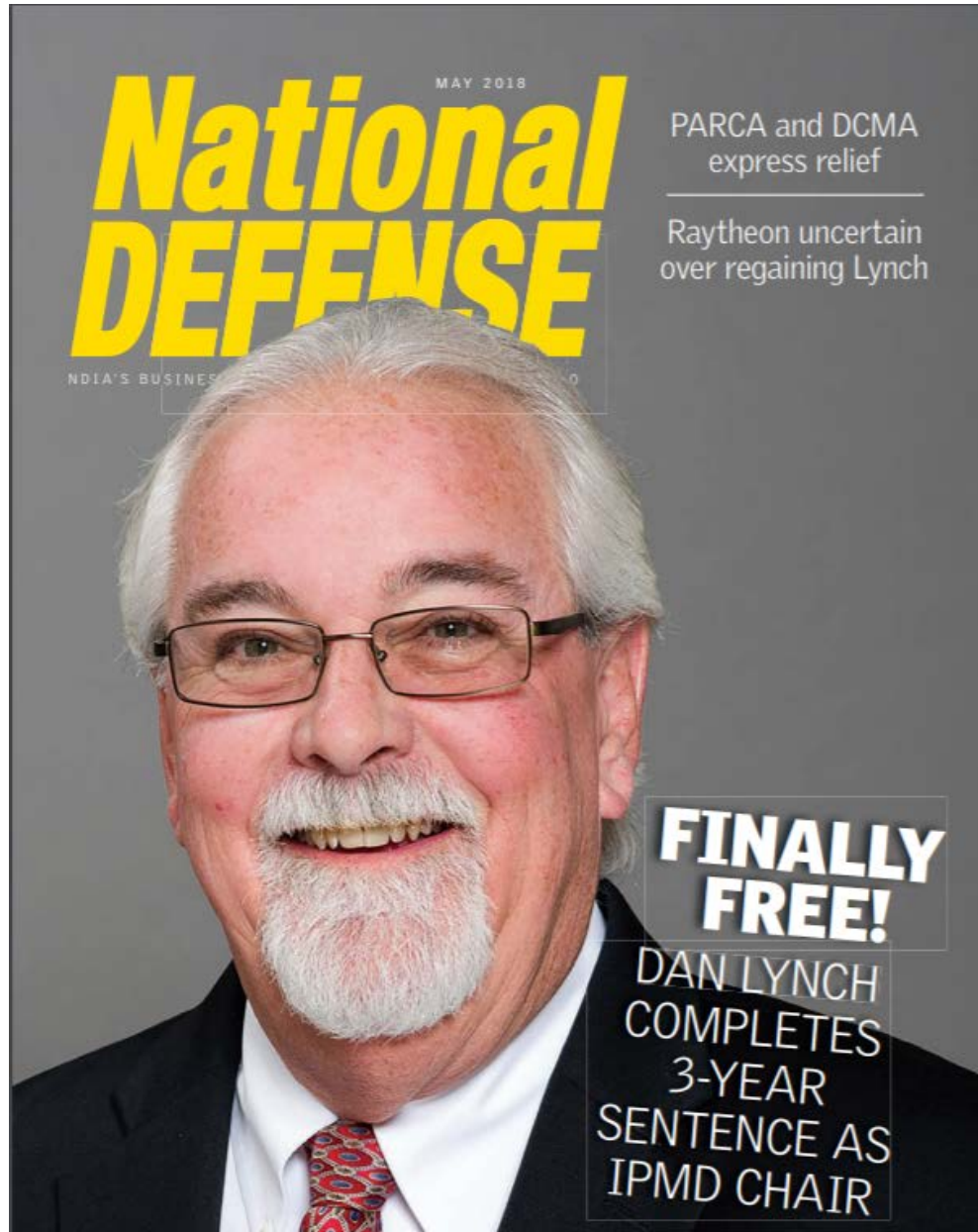


<u>Name</u>	<u>Date</u>	<u>Recognition</u>
Kathy Dailey	Aug 2016	Leadership / Agile and EVM WG
Joan Ugljesa	May 2018	Dedication to Division

## Who's Next?

# ...Another 15 Minutes of Fame...

**NDIA**



- **Panel Discussion with Emerging Leaders – 1:15-2:15**
- **Business Benefits Realization – Charlie Mahon**
- **Working Group Locations: 3:15-4:45**
  - Clearinghouse – Meeting Room 1
  - Program Management – Meeting Room 2
  - Planning & Scheduling – Meeting Room 3
  - Prime & Subk – Meeting Room 4
  - Agile & EVM – Meeting Room 5
  - CSDR – Meeting Room 6
  - IBR Guide Update - Boardroom
  - Contracts – Ballroom
- **Reception: 5:15-7pm**