What's Next for the EIA 748 Standard for EVMS?

NDIA IPMD

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Background

- **The NDIA Integrated Program Management Division (IPMD) is the author of and the steward for the EIA 748 Standard for Earned Value Management Systems**

- **The NDIA IPMD is responsible for reaffirming the Standard every five years with SAE International, the standards body that sponsors the EIA 748 for the IPMD**
  - The IPMD also maintains a set of complementary guides to the Standard such as:
    - Intent Guide, Application Guide, System Acceptance Guide, IBR Guide, Surveillance Guide, Scalability Guide, and Master Definitions List for IPMD Guides

EIA 748 Project Overview

1. **<u>Near term</u> - Reaffirm the Standard, solicit input for updates and improvement, maintain for accuracy**
   - History of the EVMS Standard
     - ✓ ANSI 748 Initial release approved May 1998
     - ✓ ANSI 748-A Reaffirmed August 2002
     - ✓ ANSI 748-B approved July 2007
     - ✓ EIA 748-C approved March 2013
     - ➢ EIA 748-D in progress

2. **<u>Long Term</u> – Evaluate the need for and possibility of substantial revision and modernization of the EVMS Standard**

EIA 748-D Refresh/Reaffirmation Timeline

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- **January 2017 – Kick-off Refresh/Reaffirmation effort with Government and Industry stakeholders**
- **February to August 2017 – Comment collection period**
- **March 31 2017 – Initial inputs/comments were due**
- **September to December 2017 – Comment adjudication period**
- **January to March 2018 – Document finalization and review process with SAE**

EIA 748-D Key Edits Approved by IPMD Board

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- **Note 4: complementary systems to interface with the EVM System – E/MRP & Agile**
- **Adds & Edits to Definitions to align with common terminology**
  - ACTIVITY/TASK
  - AUTHORIZED UNPRICED WORK (AUW)
  - ELEMENT OF COST (EOC)
  - ESTIMATE AT COMPLETION (EAC)
  - ESTIMATE TO COMPLETION (ETC)
  - LEVEL OF EFFORT (LOE)
  - MANAGEMENT RESERVE (MR)
  - OVER TARGET BASELINE (OTB)
  - OVER TARGET SCHEDULE (OTS)
  - RISK OR RISK AND OPPORTUNITY (R&O)
  - SUMMARY LEVEL PLANNING PACKAGE (SLPP)
- **Added Graphic around Establishing Control Accounts**
- **Edit to planning package conversion – "ensure planning packages are converted into work packages prior to the start of the planned work"**
- **Added content around "Purchased Services"**
- **Added items to section 6 - suggested references**

Path Forward for "Next Generation EVMS Standard"

- **Current plan**
  - Start with a series of surveys and interviews
    - Workshop conducted at Fall IPM meeting 35 Surveys Received
    - Additional survey venues are under consideration
  - Consolidate observations
  - Share results with Stakeholders
  - Determine path forward
- **The key imperative – must determine the appetite for substantial change**
  - Industry and Government heavily invested in current state
  - What is the "learning curve" with new content to regain a similar level of understanding, commitment, and collaboration that we have today?

"Next Generation EVMS Standard" Survey Observations

- **The "next generation" EVMS Standard should provide expanded discussion/explanation of concepts**

- **Do not add a guideline for Program Management but do add one for Risk Management**

- **Only minor merging of guidelines should be considered**

- **Guideline 5 should be removed and call WBS/OBS integration the RAM**

- **Section 3 of the Standard should discuss the difference between funding and budget in an EVMS environment**