

# 2020 NDIA IPM DIVISON WINTER MEETING

**Dates:** January 29-30, 2020

**Location:** L3Harris Technologies – Palm Bay, FL

## DAY #1 – Wednesday, January 29th

### CALL TO ORDER & INTRODUCTIONS – Mr. Dan Lynch, Chair NDIA IPMD, Raytheon Missile Systems

Mr. Lynch called the meeting to order and thanked everyone for being here. He went through the agenda and noted a few changes to the paper copy. Everyone in the room introduced themselves.

### NEW YEAR, NEW COMPANY – Mr. Ed Zoiss, President, Space & Airborne Systems Segment, L3Harris Technologies

Mr. Zoiss discussed the merger of L3 and Harris, which at the time was the largest industry merger in the history of A&D and created the 6<sup>th</sup> largest defense firm. Key points of the newly merged company:

- The new L3Harris is broken in four major segments: Integrated Mission Systems (HQ in Palm Bay, FL), Space & Airborne Systems (HQ in Palm Bay, FL), Communication Systems (HQ in Rochester, NY), and Aviation Systems (HQ in Arlington, TX). He provided an overview of each.
- L3Harris has four focused technology investment initiatives right now: actionable intelligence, spectrum superiority, warfighter effectiveness, and safe and secure skies.
- L3Harris puts a lot of emphasis on research and development. They currently spend ~4% of revenue on R&D. The industry average is 2%.

### DCMA MAJOR PROGRAM SUPPORT – Mr. Eric Palmer, Director, Major Program Support Division, Portfolio Management & Business Integration, Defense Contract Management Agency (DCMA)

Mr. Palmer presented on DCMA's monthly Program Assessment Report (PAR). Key points:

- Intended to be the primary vehicle for reporting program risk and the issues impacting the contractor's ability to deliver warfighter products on-time and within contractual cost.
- Produced on ACAT I/MDAPS + and other high priority programs, if possible.
- Navy, Air Force, and Army contain the largest number of major and non-major reporting programs by service for the PARs.
- PAR was recently redesigned due to a change of information demands from customers and to keep relevant, timely and aligned with the information OSD is asking for.
- EVM is used monthly to evaluate the quality of IPMR to ensure data is acceptable for EVM analysis, review tripped indicators, issue CARs for contractual noncompliance of missing/late EVM CDRL deliverables or incorrect CDRL data, apply contractual thresholds for VARs, identify WBS elements that significantly contribute to overall contract variances.

- EVM is used quarterly to develop EACdcma (bottoms up EAC at the WBS level rolled up to contract level). At the contract level, evaluate MR consumption and apply projected MR usage. Also, evaluate EAC realism and develop the ECDdcma quarterly.
- Prime Control of Subcontractors Assessment (PCSA): job aid includes 6 surveillance processes: sourcing strategy, purchasing process, work transfer, supplier performance monitoring, supplier surveillance, continuous assessment through four business domains.
  - PCSA scores < 3 result in RIOs.
- Access and storage of PARs held on DoD's AIR (Acquisition Information Repository).

#### **NETWORKING BREAK - Government Departs to Separate Meeting**

#### **CLEARINGHOUSE AND OTHER INDUSTRY-ONLY TOPICS – Mr. Gary Humphreys, CEO, Humphreys and Associates, Inc., Mr. Russ Rodewald, Director, Raytheon Earned Value, Raytheon Company**

Mr. Humphreys and Mr. Rodewald received a lot of feedback from the membership and thanked everyone who provided comments/topics. Key topics:

- GL6 – AAP agrees to document clarification around WPs
- Options for situations where contractor's customer directs them to perform new work (additional scope without approval of cost of work proposal): stop work, use company funds/risk, conditional MR while pursuing a claim, display as AUW on IPMR, treat customer work scope authorization with no additional cost as an OTB, use zero or \$1 budget WPs and only collect ACWP until resolution
- Multiple EOCs within a WP: okay to do if you earn progress in the same manner or there is a single EVT. EOCs must be broken out at the control account to support material price and usage variances along with labor rate and efficiency calculations.
- Only one EVT for a WP: pick an EVT based on how the work is planned and where long-duration WPs are unavoidable, interim milestones representing measurable, technical accomplishments are required.
- EVM System validation by CAGE Code (validation typically by site; sites could have multiple CAGE codes). Dale Gillam is putting together a white paper to address this.
- FFP/FPI actual cost reporting on CSDR/IPMR:
  - FPI: actual costs on IPMR and CSDR, factor for price/EAC ratio on CFSR
  - FFP: ACWP = BCWP, CSDR wouldn't expect actual cost visibility
- Portions of WBS executed by both Prime and Sub:
  - If major sub, they are already split out on Format 2 so they wouldn't necessarily have to be separated for reporting. Some subs report IPMR directly to the Central Repository (CR). Management decision whether or not sub should participate in IBR. Metrics should be flowed-down to Sub.
- Tying risk management to schedule margin – AAP and DCMA are eventually going to remove from SIG that schedule margin (SM) is tied to the risk register. It will remain tied to the risk management process in some way. DCMA still expects the duration of the schedule margin task

to be “defensible”. The defensible reason needs to be consistent throughout the project life cycle.

**DECM COMMITTEE – Ms. Cheryl (CJ) Jones, Director, Program Planning and Scheduling, Lockheed Martin Corporation**

Ms. Jones introduced the new Health Metrics committee, which has been created to be a voice of industry to collaborate with DCMA on the DECMs and any other organizations doing compliance metrics (i.e. DOE). Committee will work closely with DCMA/DOE/etc. to provide feedback on new and/or existing metrics. Participation will be needed regularly, not just at NDIA meetings. The goal of the Winter meeting is to establish the committee team, which is limited to 2 people per organization. The first input to DCMA is expected to be provided before July CCB.

**SCALABILITY GUIDE VOTE – Mr. John Duval, Integrated Program Planning and Controls, SM&A**

Mr. Duval presented an overview of the EVMS Scalability Guide 2019 Refresh Version 2. There were approximately 128 mostly minor changes as a result of 58 adjudicated comments from 8 companies. A vote was taken by raising hands and the Scalability Guide was approved unanimously by membership.

**PLANNING & SCHEDULING PANEL – Ms. Lisa Hastings, Project Manager, EVMS Compliance – Business Systems, General Atomics Aeronautical Systems, Inc. and Yancy Qualls, Engagement Director, Humphreys and Associates, Inc.**

Ms. Hastings and Mr. Qualls facilitated the panel discussion. The panelist included:

**Mr. Erik Berg (Group Lead, Twin Cities EVMS Center, DCMA)**

**Ms. Donna Holden (Deputy Director, EVMS Center, DCMA)**

**Mr. Jeff Lasky (Discipline Chief, Program Planning & Scheduling, Pratt & Whitney)**

**Mr. John Scaparro (Subject Matter Expert, Government Scheduling and IPM, NAVAIR)**

**Mr. Tom Terbush (Representative, Project Management & Planning Operations, Lockheed Martin Space Systems Company)**

**Mr. Brian Valenti (Senior Manager, Scheduling, Collins Aerospace)**

Before the panel, Mr. Qualls presented on the change of wording for critical path in the IPMR DID. The old wording stated that it was “a sequence of discrete tasks/activities in the network that has the longest total duration through the contract or project...(with) the least amount of float/slack”. The issue is when more than one deadline exists, the most delinquent deliverable (least float), is not always the last deliverable (critical path). For example, on a contract for 10 aircraft generally they won’t all be due on the last day of the contract and each has their own deliverable deadline. Another clarification in the new wording is that the critical path can start in the future and it doesn’t necessarily have to start at time now. And if the critical path starts in the future, the critical path may not necessarily be the longest path. New wording in the draft is “critical path is the longest continuous sequence chain of incomplete discrete tasks/activities/milestones and if present, parallel chains in the schedule network that drive the forecast dates of the agreed-to contract endpoint”. See PowerPoint for the full definition. Mr. Qualls

noted that it is important to know that this change of wording does not imply all critical paths that have high float and are constrained to start in the future are compliant. All constraints should serve a valid and justifiable purpose.

**Question** – For DCMA, what is expected by the term Schedule Margin (SM) is “defensible”?

**Answer** – In the SIG it says SM needs to be traceable to risk register, but this wording is being removed because not every company uses a risk register. Defensible just means it needs to be supported by your risk management process.

**Question** – What are the advantages and disadvantages from your perspective of using schedule margin?

**Answer** – Advantages: SM gives some leeway/buffer time overall and helps PMs manage the program better because it gives them time to mitigate risk. Disadvantages: it is perceived as being complicated so people just use total float to manage. When you have schedule margin, but bad processes in place you will often end up losing more time. SM is often abused.

**Question** – How do you ensure the proper use of SVTs and how should other non-resourced tasks be accounted for?

**Answer** – It’s key to have conversations to understand what the CAMs are trying to do with the work to understand if things are truly SVTs. Consider developing/using an SVT decision tree.

**Question** – Thoughts on the DECM schedule metrics and how they are used in your organization?

**Answer** – Metrics are used and management encourages analysts to run them in a rhythm (at least monthly, sometimes more frequently) to be able to fix issues timely/quickly. Metrics are also used internally for surveillance and as conversation starters. The downside of the metrics is there are only so many that are automated so you can quickly achieve results on those, but the manual ones are harder to run more frequently. Also, DECMs are mainly looking at the health of the schedule and there has been so much hype around the metrics that we have lost some of the execution metrics to see how the schedule is performing.

**Question** – How should EAC only tasks (recovery/mitigation/etc.) be handled since they don’t fit the SVT definition?

**Answer** – Whatever your system description allows. Don’t manage your program to not trigger a DECM.

**NETWORKING LUNCH – Sponsored by Deltek**

**GOVERNMENT AND INDUSTRY CONCURRENT WORKING GROUP BREAKOUT SESSIONS #1** - The group divided up into their working group sessions: Clearinghouse and CSDR.

**NETWORKING BREAK**

**GOVERNMENT AND INDUSTRY CONCURRENT WORKING GROUP BREAKOUT SESSIONS #2** - The group divided up into their working group sessions: Agile and EVM, DECM, Production.

**NETWORKING BREAK**

**GOVERNMENT AND INDUSTRY CONCURRENT WORKING GROUP BREAKOUT SESSIONS #3** - The group divided up into their working group sessions: Planning & Scheduling, Program Management, Contracts.

**NETWORKING RECEPTION – Sponsored by BOD**

## **DAY #2 – Thursday, January 30<sup>th</sup>**

### **CALL TO ORDER – Mr. Dan Lynch, Chair NDIA IPMD, Raytheon Missile Systems**

Mr. Lynch called the meeting to order and went over the day's agenda.

### **THE STATE OF IPMD: TODAY AND TOMORROW – Mr. Dan Lynch, Chair NDIA IPMD, Raytheon Missile Systems and Mr. Neil Albert, Vice-Chair IPMD NDIA, President and CEO, NFA Consulting, LLC**

Mr. Lynch thanked the event's sponsors (L3Harris, ClearPlan, Deltek, PrimePM, BDO, and Midnite Dynamics). The NDIA IPMD BoD has been working on making some changes to the BoD Roles and Responsibilities and Charter, they have committed to continuing an IPMD track at the CPM events (EVM World and IPMW), Working Groups have been changed to "Committees", and Working Group Leads have been changed to "Chairs". The Prime/Sub Committee has been suspended for the time being and there is a new Committee called "Health Metrics" led by Board members CJ Jones and Dan Bellovary. The NDIA is working on updating its operating principles for all Divisions so the IPMD BoD worked closely with the NDIA and provided an extensive list of comments/changes/questions. The Predictive Measures Guide is due for an update this year. If you have someone or a team who is worthy of the NDIA IPMD Distinguished Service Award, please provide their name to John Duval or anyone on the IPMD BoD.

Upcoming events:

- DAU IPMDAR panel: Feb 20, 2020 (Huntsville, AL)
- IPMD Spring Meeting: April 28-29, 2020 (Tyson's Corner)
- EVM World: June 9-11, 2020 (Fort Lauderdale, FL)
- IPMD Fall Meeting: September 15-16, 2020 (E Hartford, CT)
- IPMW: November 17-19, 2020 (San Diego, CA)

Mr. Albert presented on NDIA IPMD's Strategic Plan for 2020-2023. Key points:

- IPMD Today: Focus on IPM through industry and government partnerships and being thought leaders in terms of IPM and the community as a whole. Working to get people involved, provide relevant topics for presentation, and improve the business overall. The goal is to also continue updating guides.
- Why a change is needed: continue to evolve from simply program management systems to integrated program management because it focuses more on program success. IPMD also needs to continue to collaborate more with government and industry across various disciplines to achieve a successful acquisition process. IPM needs to adapt to the changing environment and acquisition approaches that the Department is taking.
- Where do we go: develop a 3-year strategic plan to broaden organizational approach and identify key players, actions and milestones. Focus on three strategic objections: (1) broaden IPMD to be an advocate for more than EVM, (2) ensure IPMD collaborates with federal agencies to achieve a balanced approach for this broadened view, (3) champion industry's efforts to

mature project/program management and ensure success. IPMD BoD has established goals, objectives, and initiatives/actions to achieve the strategic plan.

- Mission and purpose: changed to remove the focus on EVMS and broaden to be more relevant for integrated program management and how it's applied.
- Investments necessary to succeed: (1) recommend government allow for more industry use of self-surveillance, (2) generate industry support through company representatives on IPMD BoD, (3) collaborate with other organizations that represent project/program management and related disciplines, (4) encourage committees to address integrating project/program management and EVMS activities, how they contribute and identify additional focus areas they can address (i.e. risk/opportunity), (5) increase IPMD BoD engagement with other NDIA leadership and NDIA Division leadership (System Engineering, Cyber, Production, Contracts, etc.)

### **DEPARTMENT OF ENERGY UPDATE – Mr. Mel Frank, Project Controls Division, Office of Project Management, Department of Energy (DOE)**

Mr. Frank provided a Department of Energy Topical Update. Key points:

- Earned Value Management System (EVMS) Research Study with ASU:
  - Goal is to elevate the worth and utility of EVMS by providing a method to assess the maturity of management processes and attributes. By looking at compliance in a different and holistic manner, they are identifying opportunities to improve the reliability of EVMS implementations.
  - Team is still mostly on track with the timeline and expects to be completed in 2021.
  - See PowerPoint slides for an overview of the study's survey results.
  - Proposed name: EVMS Maturity and Environment Total Rating (METR)
    - Maturity: 10 processes with 68 attributes
    - Environment: 3 categories with 46 factors
  - EVMS Workshop Plan: goal is to put "new eyes" on EVMS METR evaluation. Looking for 20 attendees per session with a minimum of 10 years of project controls experience. Five to six workshops are planned to begin in Summer 2020. If you are interested in hosting or participating, contact Mel Frank.
- DOE Project Assessment Reporting System (PARS): DOE's central repository to submit cost and schedule data.
  - EVMS Metric tests currently have 197, that number is going down to 192. DOE specification sheets update being finalized this week. Many tests are similar to DoD but include more baseline IMS metrics.
  - Data Quality: EFCOG EVMS Best Practices Working Group is a partnership between DOE and Energy Facility Contractors Group to develop best practices.
  - Contractors are required to report EVMS data with cost at the CA level and schedule by activity. The goal going forward is to have an option for contractor self-surveillance with DOE federal oversight. This requires cost reporting at the WP level and schedule by activity by EOC.

- Data issues found across contractor's data: Structure challenges in the WBS and OBS (multiple level one elements, lack of cost and schedule integration, no OBS, summary WPs with "S, P, and A" scattered) and contractor system challenges (budget alignment, missing data like ETC with no budget, dates differ between older reporting periods and current)
- EVMS/PARS Snippets: DOE developed narrated videos on specific topics related to project management and EVMS. The purpose is to learn something new or get a quick refresh. Available to the public: <https://www.energy.gov/projectmanagement/evms-training-snippets>. Initial videos are being refreshed/updated and 50 additional ones will be released in the coming months. See PowerPoint for a list of snippets.
- Standard Operating Procedures and Guides: mandatory for PM staff, but provided for guidance to DOE contractors and guidance staff. All available online for the public:
  - EVMS and Project Analysis Standard Operating Procedure (EPASOP) is similar to the Predictive Measures guide. Helps with monthly project assessments at PMB level.
  - EVMS Compliance Review Standard Operating Procedure (ECRSOP) contains the compliance assessment guide, compliance review checklist, flat file formats, etc.
  - Capital Acquisition Series Guides being worked on currently

## **NETWORKING BREAK**

### **NASA GAO HIGH-RISK LIST CORRECTIVE ACTION PLAN (CAP) – Mr. Jerald Kerby, Program Executive, EVM, NASA and Ms. Kristin Kehrer, KSC EVM Focal Point and Deputy Program Executive, NASA**

Mr. Kerby and Ms. Kehrer presented on NASA's Enhanced EVM Implementation CAP initiative as a result of being on the GAO High-Risk List. Key points:

- NASA's acquisition management has been on the GAO's high-risk list since 1990. GAO has recognized NASA's progress between 2012-2017.
  - In September 2018 agency leadership determined that a new CAP was necessary to continue driving improvements in NASA's program and project management policies and processes.
  - In December 2018, the Agency Program Management Council (APMC) approved a set of initiatives for this improvement. (See PowerPoint for list of 2018 and 2019 initiatives)
- Approach
  - Developed a list of achievable ideas to enhance EVM implementation (i.e. things that were actionable, timely, impactful, measurable)
    - Common themes during the process included data quality issues. The EV data was not being reported to the right people so there was a discrepancy between the EV data and financial/accounting data.
  - Issued senior leadership policy letter to refine requirements and expectations. It gave a sense of importance and urgency to help increase the chances of implementation.
  - Updated training materials, handbooks, guides, reference materials with the new policy
    - NASA has a new EVM website available to the public

- Areas of Focus
  - EVM Reporting: require EVM metrics to include independent EACs at senior level baseline performance reviews (BPR) including SPI, CPI, and EAC. Getting the data in front of more senior leaders who are asking questions is leading to better data. NASA now requires CPR and IPMR submittals to a central repository.
  - EVMS Surveillance: (1) enhance in-house surveillance, (2) enhance contracted surveillance with delegation to DCMA, (3) use NASA resources to conduct EVM surveillance on major suppliers where DCMA does not have an existing presence (APL, JPL, SwRI), (4) require data anomaly reports and CAPs. See PowerPoint for EVMS Surveillance for Guiding Principles.

**SMC EVMS APPROACH ON MID-TIER ACQUISITIONS – Ms. Racquel Tacda, Branch Chief, Cost & EVM, Space & Missile Systems Center and Mr. Albert Shvartsman, SMC Chief, EVM, Space & Missile Systems Center**

Ms. Tacda and Mr. Albert presented on Space and Missile Systems Center’s new EVM Approach for Middle-Tier Acquisition (MTA) programs. Key points:

- Recent reorganization at SMC. There is no more program office. The new name will be Space Force Systems Center.
- MTAs include rapid prototyping (innovative technologies for new capabilities) and rapid fielding (proven technologies with minimal development required). MTAs are not dollar value threshold limited, not classified as MDAPs, not overseen by JCIDS and not governed by DoDD 5000.01 and DoDI 5000.02. Rather subject to statutory and regulatory requirements and governed by DODI 5000.90, which allows for tailoring.
- Tenets of rapid acquisition: key idea is that schedule and funding defined in the ASD should be considered relatively fixed.
- SMC has developed a streamlined approach to bring EVMS for efficient management in a rapid acquisition environment because using EVM as a proactive tool is key for better management processes. Approach steps: (1) emphasizing realistic and achievable schedule and cost baselines, (2) link EVM with risk management process, (3) streamline and eliminate non-value added processes.
- Implementing the approach: obtained a DFARS Class Deviation and instead added the following to the statement of work:
  - (1) Contract(s) must comply with EIA-748 with internal surveillance and have a PMB assessment with government participation instead of IBR
    - PMB Assessment vs. IBR: same focus, but a different approach. The big difference is timing. PMB Assessment is intended to be in “real-time” with the government’s early involvement instead of it being a government review.
  - (2) Baseline must reflect the most current technical plans and remain executable/realistic through the contract (requires EVMS to be used as a tool with accurate information).

- See PowerPoint for charts comparing the flow of DFARS Clause Process vs. MTA. Bottom line: EVMS contract requirement focus shifts from compliance to being a program management tool.
- IPMDAR CDRL requirement: default at the control account level, MS Project is the required schedule format, and submission time will be per the DID as a default. A one-page contract summary is required for Format 5 Performance Narrative Report/Analysis. Subcontractor reporting is required if greater than \$100 million (subject to increase/decrease based on SMC discretion and contractor agreement). IPMDAR deliverable will not be used by SMC for compliance with EVMS (EIA-748).
- This approach has only been approved to be used on MTA.

## **NETWORKING LUNCH**

### **CADE UPDATE – Mr. Fred Janicki, OSD CAPE Cost Assessment**

Mr. Janicki presented on recent Cost Assessment Data Enterprise (CADE) updates. Key points:

- CADE was initiated in 2013 to enable the sharing of data in a more efficient way. More workflow automation was introduced in 2016 and the FlexFiles were initiated in 2019. This efficiency improvement has allowed for more analysis/awareness and less data synthesis/understanding and data collection. Access to more information has also improved cost estimating.
  - CADE contains over 3,000 active users with over 2,000 DoD analysts and program office personnel and 700 industry data providers. Users are also spending more time downloading and using the data than ever before.
- FlexFiles
  - Contractor data submission options for FlexFile: (1) contractor format, (2) three-part template, (3) JSON data model
    - cPet Basic Process has given contractors help with submission of data from a blank excel template into a three-part template then with the creation of the JSON file
  - Development priorities: continuing to improve the cPet FlexFile and Quantity Validation and Review
  - FlexFile implementation progress
    - 134 total approved plans made up of Navy (78), Army (35) and Air Force (21).
    - 108 of these are FlexFile only and 26 are both FlexFile and Quantity Data Report.
    - 134 approved plans = 846 total submissions.
    - There are 155 plans in the process of getting approved.
    - There have been 20 total submissions as of January 17th (7 were three-part template, 3 JSON, 10 contractor format). Lockheed, Raytheon, Northrop, Ball, Boeing, Moog, and GDLS make up this list of companies.
  - FlexFile submission review duration is decreasing as there is more engagement with the contractor before submission and as contractors become more familiar with the FlexFile requirement
- Continuing CADE Initiatives

- SRDR: focus in the department is on collecting agile metrics and getting away from only looking at only source code as a measure of progress/success. The metric review is still very manual and the Department wants to automate this as much as possible in the coming years as reducing the manual effort will improve the quality and consistency of SRDR data.
- 1921-3 is the Contractor Business Data Report (CBDR). It is an annual report at the business level that provides rates and business base data to facilitate overhead analysis. Starting next year, the 1921-3 report is transitioning permanently from the government-defined standard (Legacy) format to the Contractor unique format. After this, it will no longer be an option to submit either format.

### **COMMITTEE OUTBRIEFS:**

Each Lead/Co-Lead presented a summary of what their committee has most recently been working on and/or what they have planned to work on going forward.

- **Clearinghouse:**
  - GL 6 – government drafting interpretation paper to clarify EVMSIG
  - Customer direction to perform new/disputed work scope: work must be budgeted: AUW, OTB. Value aligned to propose or agreed to value before definitization.
  - Multiple EOC in a single WP: necessary at times, but discouraged when possible. The system must support material price/usage and labor rate/efficiency analysis.
  - One EVT for a WP: No LOE intermixed at the task level. For long-duration WPs, use % complete and have a series of 0/100 interim milestones.
  - WBS combining resources of both Prime and Sub: work scope should be intermixed based on program needs. For mixed labor (internal/subcontract) track in hours only
  - FFP/FPI actual cost reporting on CSDR/IPMR
    - FPI: no factoring of baseline or actuals on IPMR report (CFSR reports share ratio adjusted billing)
    - FFP: ACWP set equal to BCWP
  - EVMS System validation by CAGE Code (validation typically by site; sites could have multiple CAGE codes). Dale Gillam is putting together a white paper to address this.
- **Production:**
  - Robert Jennings and Jeff King will serve as the Chairs
  - Hoping to have a longer, more focused meeting at Spring meeting to propel efforts
  - Committee has developed a working model of mission and objectives
  - Intend to put out a survey on what industry is doing and what government needs to manage then plan to develop a best practices guide for IPM with a production focus
  - Other future plans: develop guidance on critical materials and collaborate/work with NDIA Manufacturing Division
- **Agile:**
  - Will shift to an “on-demand” committee and only meet regularly when agile guide needs updating

- Will still have an ongoing presence to ensure proper training is continuing (agile overview and agile/EVM training will happen at EVM World)
- Will collaborate with Systems Engineering Division to add an agile component
- Ron Terbush will continue to function as a SME for all committees when needed
- **Health Metrics:**
  - First meeting held 1/29. It was a kickoff session to gather the names of people who want to participate. There is a lot of interest.
  - Work will be done via teleconferences and engagements outside of NDIA meetings
  - Progress and status will be briefed and discussed at NDIA meetings
  - Next steps: identify chair/co-chair before Spring meeting and provide first input into DCMA in June before July CCB
- **Planning & Scheduling:**
  - PASEG refresh released in September 2019
  - Other committee topics/initiatives: DECM changes (some changes to existing metrics, but no additions or deletions to GL 6 at DCMA January 2019 CCB), assist with Predictive Measures Guide update, continue discussion on updated definition of critical path, discussion on schedule margin in general, schedule margin maintenance and understanding “defensibility” term.
- **Program Management:**
  - Predictive Measures Guide Update is the main focus
  - Working on panels for Spring IPMD meeting
  - Updating website with most current information
  - Working on contract health metrics
  - Will have a track at the NDIA Systems Engineering meeting in October (abstracts due 05/15 – send speaker or topic suggestions to Dale Gilliam or Stewart Tague)
- **Contracts:**
  - Actively working on “Contracting with EVM Requirements Guide” (see PowerPoint for team list and guide layout).
    - Guide is to be aligned with PMBOK and CMBOK, will apply to government contracts, and cover PM and CM lifecycles.
    - There are open sub-lead positions and writers.

**EIA-748E UPDATES – Mr. Shane Olsen, Manager, NGAS Sector Program Control, Northrup Grumman Corporation and Mr. Randy Steeno, BDS EVMS Policy, The Boeing Company**

Mr. Olsen and Mr. Steeno provided an update on the EIA-748E. Key points:

- Shane thanked everyone on the committee who has invested a lot of time in the discussions.
- Next milestone is April 2020 to release a full version of a draft. It will be open to global comments. One comment phase is expected by the end of the year and another next year before publication.
- Approach: Guide 2 was the initial focus to improve the flow of guidelines and make it more understandable. Also, move attributes, definitions, implementation requirements to Section 3.

- Section Two was finished 1/29. It went from 32 to 28 guidelines. See PowerPoint slides for 28 guidelines. They will also be published on NDIA IPMD's 748-E website.
- Next steps: focus on Section 3.

## **NETWORKING BREAK**

### **AAP UPDATE – Mr. John McGregor, Deputy Director for EVM, Acquisition Analytics and Policy**

Mr. John McGregor provided an update on the policies and initiatives AAP is working on. Key points:

- AAP owns and updates all policies around earned value as well as the Contract Funds Status Report, MIL-STD-81, DFARS clauses, Capital Planning Guide, DID for EV reporting, OTB/OTS Guides, and more. All policies are posted at <https://www.acq.osd.mil/evm>
- EVM CR came out of CADE/CAPE portal and AAP moved it into its cloud environment
- If you have questions about using EV on a project, DCMA issues, etc. you can submit issues/questions on the AAP website.
- Acquisition framework: the structure of the 5000 series has changed. There are different pathways of acquisition that fall under each other. Within each is regulatory and statutory requirements.
- The myth that you don't have to do EV anymore is wrong. Nothing has changed with acquisition pathways. Things like the 5000.02 Tables 8 and 9 applies, DFARS applies, etc. Cost, schedule, and technical accomplishments must still be managed. You are still going to provide artifacts on systems you are running to provide for transparency and execution.
- IPMDAR: no more paper files, only electronic files, which will be uploaded into the EVM CR. **All** EV reporting will go into EVM CR going forward. This will apply to new contracts and any contracts that are modified. Once uploaded, files will go through a validation process to ensure data quality.
  - Changes from IPMR to IPMDAR: more visibility into control accounts and work packages, hours and dollars, element of cost, fully time-phased future plans, traceability between cost and schedule, and retroactive contract changes with time-phased To date
  - See PowerPoint for a highlight of fields encoded in file, derived, and removed in IPMDAR
  - Final due no later than 16 business days after the contractor's accounting period close. Incremental delivery requirement defined in CDRL.
  - IPMDAR will provide maximum flexibility in analyzing data

### **CLOSING REMARKS & ADJOURNMENT - Mr. Dan Lynch, Chair NDIA IPMD, Raytheon Missile Systems**

Mr. Dan Lynch thanked everyone for attending and adjourned the meeting.

**See you at the 2020 Spring NDIA IPMD meeting on April 28-29, 2020 at the Westin Tysons Corner in Falls Church, VA. Visit <https://NDIA.org/SpringIPM> for more information.**