

2022 NDIA IPM DIVISION SPRING MEETING

Dates: April 13-14, 2022

Sponsors: Lockheed Martin, ClearPlan, and Encore Analytics

Location: Washington Hilton Dulles Airport - Herndon, VA

DAY #1 – Wednesday, April 13, 2022, 9:00 am – 5:45 pm ET

NETWORKING BREAKFAST

CALL TO ORDER & DIVISION UPDATE

Russ Rodewald - Senior Director, EVMS, Raytheon Technologies and Vice Chair of Strategy for NDIA IPMD Board of Directors

Mr. Rodewald opened the meeting. He requested attendees utilize SLIDO for speaker questions and went over the agenda for the day including minor changes. He then thanked the sponsors (noted above), went over the Division's Board of Directors, and the IPMD Committees with applicable Chairs/Liaisons. To conclude, he reviewed the status of each of the Division's Guides.

WELCOME & NDIA UPDATE

Jae Yu - Director of Divisions, NDIA

Mr. Yu thanked everyone for joining the meeting, the speakers for participating, and the Board for organizing the event. He provided an update to NDIA's Vital Signs report, which is a report on the health and readiness of the Defense Industrial Base. If you desire additional updates, questions or clarifications on the Vital Signs report contact Jeff Goldberg at jgoldberg@ndia.org. Note, no slides were used in this presentation.

SPONSOR PRESENTATION

Thomas Carney - Vice President, Program Assessment and Evaluation, Lockheed Martin Corporation

Bridget Lauderdale - Vice President and General Manager, F-35 Lightning II Program, Lockheed Martin Corporation

Ms. Cheryl "CJ" Jones introduced Mr. Carney and Ms. Lauderdale. They discussed the program management aspects related to the development, sustainment and modernization of the F35 program at Lockheed Martin (LM). Ms. Lauderdale touched on the impacts of the F35 on a global stage and the importance of delivering capabilities on time when events such as the Russian invasion occur to show strength and force alongside our European allies. She discussed some of the COVID impacts to the F35 industrial base, which generates approximately \$65 billion into the economy. Even during the COVID time, LM was able to accelerate payments to small businesses who were vulnerable. Despite COVID

constraints, LM was also able to deliver 120 F35 aircraft in 2020 and 143 in 2021. To conclude, she touched on the key things for starting a program off right, which include: (1) having a plan with the right requirements and understanding with the customer and (2) establishing a baseline and measuring to it by utilizing indicators. The session was then opened up for SLIDO Q&A. Note, no slides were used in this presentation.

DCMA UPDATE

Jean Christian Brutus - Acting Deputy Director, EVMS Center, Portfolio Management & Business Integration (PM&BI) Directorate, Defense Contract Management Agency (DCMA)

Mr. Brutus provided an overview of the following for DCMA and the EVMS Center:

1. Mission and Vision, EVMSC current organization chart, and Charter
2. FY21 results and FY22 projections with the Center's planning process overview
3. WSARA implications
4. Overview of the current DECM version (next CCB planned for Oct 22)
5. Future plans for DECM include refining thresholds, establishing DECM prioritization, and collaborating with the NDIA Health Metrics Committee
6. EVMSC: Policy IPT overview/working group participation, types of reviews and event planning for those, Career Development Program, Software Tools, and Lessons Learned
7. The key Guidelines to focus on (6, 10, 27) for DECM metrics because they represent a large portion of all records and are highly automated

The session was then opened up for SLIDO Q&A.

NOMINEE PRESENTATION & VOTING

Gary Humphreys - Owner, Humphreys & Associates and NDIA IPMD Board of Director/Past President

Mr. Humphreys introduced the newly elected IPMD Board of Directors leadership team and officers at large: Kim Herrington (Chair), Russ Rodewald (Vice Chair of Strategy), Dan Bellovary (Vice Chair of Operations), John McGregor (Officer at Large), and Jeff Isom (Officer at Large).

NETWORKING LUNCH

KEYNOTE ADDRESS

Tanya Skeen - Acting Assistant Secretary of Defense, Office of the Under Secretary of Defense, Acquisition

Ms. Skeen discussed Acquisition within the Department of Defense, which included topics such as:

- The Department's approach to acquisition and the criticality of partnership with industry to respond to the threats we receive as a Nation.

- The strategic environment components related to acquisition. For example, acquisition must be flexible enough to adapt, secure enough to deliver at scale, and have constantly evolving policies, processes and culture.
- The Department is working on updating a few guides, including the legacy Defense Acquisition Guidebook.
- The importance of a cultural shift to embrace flexible pathways, which requires efforts across departments to be in sync especially for program management, so the integration of policies and processes can be done at all levels.
- Integrated Acquisition Portfolio Reviews (IAPRs), which are conducted monthly to ensure all programs are aligned at the portfolio level.
- Good data is the key to good decision making so the Department's focus is on becoming a data centered organization. They have developed the Defense Acquisition Visibility Environment (DAVE), a central point for Acquisition data for the DoD.

The session was then opened up for SLIDO Q&A. Note, no slides were used in this presentation.

CONTRACTING WITH EVM REQUIREMENTS

Elizabeth Schloer - Business Compliance Lead, Booz Allen Hamilton

Ms. Schloer discussed the NDIA IPMD Contracts Committee's efforts to update to the Contracting with EVM Requirements Guide, which has been a three year undertaking. It is expected to be released by the end of 2022. The Guide is intended to be a reference document providing detailed guidance to buyers and sellers during pre-award, award, and post-award. The guide focuses on the roles and responsibilities for buyers and sellers with RACI matrixes for each portion of the contracting process. The session was then opened up for SLIDO Q&A

GOVERNMENT & INDUSTRY WORKING GROUP BREAKOUT SESSIONS

For each of the following sessions the group divided into their working group breakouts:

Session #1: Health Metrics (Contracts cancelled).

Session #2: Planning & Scheduling, CSDR, EIA-748.

Session #3: Clearinghouse and Program Management.

Closing Remarks

Russ Rodewald - Senior Director, EVMS, Raytheon Technologies

Mr. Rodewald closed the meeting and invited attendees to join the happy hour social.

DAY #2 – Thursday, April 14, 2022, 9:00 am – 4:45 pm ET

NETWORKING BREAKFAST

CALL TO ORDER & AGENDA REVIEW

Russ Rodewald - Senior Director, EVMS, Raytheon Technologies and Vice Chair of Strategy for NDIA IPMD Board of Directors

Mr. Rodewald opened the meeting by welcoming everyone to day two and thanking NDIA staff for their support of the meeting.

KEYNOTE ADDRESS

David Berteau - President/CEO, Professional Services Council (PSC)

Mr. Berteau discussed PSC's perspective of the current Administration's priorities, how those priorities are turning into dollars that will become programs, and the framework to help shape whether those contracts can be won. The Administration's priorities are centered around four elements: (1) get COVID under control, (2) get economy moving again, (3) respond to climate actions, (4) improve diversity, inclusion, and accessibility. Those priorities have translated into 90 executive orders. The business opportunities for industry are as good as they've ever been, especially in DoD. He noted that between March and May/June is the golden opportunity to get FY22 O&M funds before they are swept up. Mr. Berteau closed by discussing some peripheral issues, such as procurement lead times, LPTA contracts, and protests. The session was then opened up for SLIDO Q&A. Note, no slides were used in this presentation.

INTEGRATED PROGRAM MANAGEMENT DATA & ANALYSIS REPORT (IPMDAR) DISCUSSION

Jennifer Horner - EVM-CR Deputy Program Manager, Tecolote Research, Inc.

Ms. Horner provided an update on the IPMDAR, including the reporting requirements, CDRL tailoring, resources/tools, and EVM-CR delivery. Regarding reporting requirements, the biggest change between the IPMDAR and IPMR is that all unclassified programs, regardless of ACAT level, are required to submit to the EVM-CR. The EVM-CR is a data repository managed by the IPM Division of OUSD(A&S) ADA. Ms. Horner reviewed the key IPMDAR CDRL tailoring options, but additional options are discussed in the IPMDAR Implementation & Tailoring Guide. IPMDAR Resources can be found on the IPM public website. Ms. Horner noted that within the EVM-CR it is very important files are labeled correctly for reporting compliance so file tagging is key when uploading. To conclude, she reviewed the submission status and review period, IPMDAR export options, and some helpful reminders/recommendations. The session was then opened up for SLIDO Q&A.

NETWORKING LUNCH

INTEGRATED PROGRAM MANAGEMENT DATA & ANALYSIS REPORT (IPMDAR) PANEL

Moderator: Shane Olsen (Sector Director for Program Control, Northrop Grumman Mission System)

Panelists: Carolyn Mistretta (Director, Business Management, Northrop Grumman Space Systems), Beth Corcoran (Integrated Program Performance Analysis, NAVAIR Cost & Schedule Department), Susan Hagel (EVMS Analyst, General Dynamics Mission Systems), Angel Rocha (EVMS Manager, Raytheon I&S Space and C2 Systems), Ivan Bembers (Chief of the EVM Center for Excellence)

Topics discussed:

- Whether the IPMDAR is on the way to addressing the issues it was initially developed to solve
- How to communicate/make people aware of the changes in the IPMDAR
- Lessons learned regarding reporting requirements, tools, processes, tailoring templates
- Handling data content discussions with subcontractors (rates)/receiving sub data
- OSD resources/recommendations for improvement of those resources (validator, DID, DEI, FFS)
- Experience with the EVM-CR

The session was then opened up for SLIDO Q&A.

OSD CAPE UPDATE

Fred Janicki - Director, Space and Strategic Systems Cost Analysis Division, OSD CAPE

Mr. Janicki provided a history and overview of CAPE functions including an organization chart review. He discussed CAPE's Cost Assessment responsibilities. He noted that training the cost community was one of their key responsibilities. Additionally, he reviewed some recent changes to law that have affected functions of CAPE. Then briefly discussed updates to the CAPE Cost Policies and Cost Handbooks/Guides. Mr. Janicki focused on the DoD Historical Cost Data Collection timeline and where CAPE is going from here, including with the FlexFile. He noted that 170 FlexFile submissions have been accepted (made up of 81 contracts, 61 programs, 34 unique business units, and 46 from subs). The session was then opened up for SLIDO Q&A.

NETWORKING BREAK

DOE UPDATE

Mel Frank - Director, Project Controls Division, Office of Project Management, U.S. Department of Energy

Mr. Frank began by providing a high level overview of DOE and PM-30. He then discussed a variety of topics, including EIA 748 EVMS facts, stats and trends seen by DOE, results of the ASU EVMS Research study, IP2M METRR Maturity and Environment trends, updates/revisions/new PM Guides, updates to the PM EVMS Compliance material, ECRSOP changes, a compliance assessment governance update, overview of the version 4.0 compliance metrics, PARS updates, and more. Refer to Mr. Frank's slide for more detail.

DIVISION COMMITTEE REPORTS

Clearinghouse – The committee received five topics for discussion and were able to cover three (OTA/OTBs and what boxes are or are not filled out on the IPMR, Variance Analysis reporting, and withholds). The two additional topics will be covered at the next meeting.

CSDR – Overall goal of the committee is to be a collaborative environment sharing experiences across the CSDR contractor community and to help provide for more understanding/guidance/direction. The committee plans to keep NDIA IPMD current on the changing environment as well as continue the communication between NDIA and CAPE/CADE/DCARC. There were 12 attendees yesterday, but the committee would like to see this grow. In an effort to transfer knowledge to the NDIA Community, the committee shared that the FlexFile and Quantity Implementation Guide was published in March 2021. To conclude, the committee shared some common pitfalls to avoid.

Health Metrics – Committee session was a Q&A with Christian Brutus and Donna Holden from DCMA. It was a very collaborative and informative session. DCMA shared how they plan to bring together the results of the DECM tests, sort the data, and understand prioritization of metrics. The committee plans to start preparing for DCMA's October 2022 CCB in July 2022. If you want to submit any change requests, please share them with the Committee or attend the meetings starting this summer.

Planning and Scheduling – Committee has been working on the PASEG Version 5 Update. They are currently in the comment adjudication phase (approx. 93% complete). The update process takes about a year and a half to complete. Significant changes in this update include an update to the definition of Critical Path and potentially the addition of an SVT decision tree. There is also the potential for a new IMS DID for smaller projects. This would be for schedule only, no EV. Finally, the Production Scheduling White Paper was put on back burner with PASEG update but the committee plans to reengage on it once the PASEG update is done.

Program Management – The committee meets monthly on the 3rd Wednesday. Contact Stewart Tague if you are interested in joining. The committee's 2022 focus is on improving CAM proficiency development programs. During yesterday's session the working group reviewed issues organizations are currently facing for CAMs and potential solutions. There will be a PM track at the upcoming Systems and Mission Engineering Conference in Orlando 10/31-11/3.

CLOSING REMARKS

Russ Rodewald - Senior Director, EVMS, Raytheon Technologies

Mr. Rodewald thanked the production team and everyone supporting the event, especially NDIA staff. He noted that a meeting survey will go out tomorrow and requested everyone participate to help the Board continue to improve the meetings. Presentations will be available once approved on the NDIA website under 'Previous Meeting Presentations'.