NDIA Integrated Program Management Division

Presentation to

NDIA Systems Engineering Division

28 October 2015

(Track 4 – 17818)

Dan Lynch
Chairman, NDIA-IPMD

Agenda

- **A Brief History**

- **IPMD Objectives**

- **Board Member Makeup**

- **IPMD Recent Activities**

- **DoD Operating Environment Update**

- **Working Groups**

- **2015 / 2016 Meeting Schedule**

IPMD - A (very) Brief History

- **Initially established as the Program Management Systems <u>Committee</u> within the Procurement Division**

  - **VERY Earned Value Management / Compliance centric**

- **Finalized creation of Integrated Program Management <u>Division</u> (2014)**

  - **Lessening of Earned Value Management / Compliance centric**

    - **Drove adjustment to Division objectives**

  - **Broader concerns addressed by "Working Groups" such as…**

    - **Planning & Scheduling; Risk & Opportunity Management; Contracts**

    - **AGILE Development; <u>Program Management</u>; Prime & Subcontract Management**

IPMD Objectives

1. Serve as a thought leader and source of best practices for integrated program and performance management.

2. Strengthen trusted relationships with PARCA and DoD oversight agencies and jointly work on EVMS-related policies and activities to achieve approved EVM systems, consistent practices, and no surprises to industry.

3. Serve as an output–oriented industrial body focused on analyzing problems and proposing solutions related to the management and execution of acquisition programs.

4. Sponsor working groups to improve the state of integrated program and performance management.

5. Collaborate across all federal agencies to resolve disparate EVM interpretation and documentation emanating from multiple sources.

6. *Collaborate with other NDIA Divisions and professional associations.*

IPMD Board Members
Effective June 3, 2015

Interim Vice Chair:
Sung Soon Stultz

Chair:
Dan Lynch

Officers at Large

Past Chairs

Neil Albert	Bill Altman	Steve Barnoske	Kathy Dailey	John Duval	Buddy Everage
Dale Gillam	Kim Herrington	Yancy Qualls	Randy Steeno	Sung Soon Stultz	Joan Ugljesa

Past Chairs:
Dan Butler — Gary Humphreys
Joe Kusick — Pete Wynne

IPMD Recent Activities

- **Support CPM Events & Conferences**
  - Provide NDIA-IPMD Overview
  - Lead Clearinghouse Topics Discussion
  - Panel Participants for Joint Government/Industry Forums
- **Joint Government – IPMD Discussions on Schedule Margin/AUW**
  - IPMR DID re-issued (Rev A) and the Implementation Guide is in final stages of update process.
- **Instrumental in driving Interim DFARS Clause raising the threshold to $100M for EVM oversight (effective 9/2/15)**

- **IPMD Board Strategy Session October 6-7**
  - April / August Meeting Survey Results
  - Confirm / Revise Objectives

IPMD Typical Meeting Agenda

	Time	Duration	Topics	Speakers
Tuesday, 25 August 2015 Industry Only Meeting	7:30 AM - 8:00 AM	30	Registration / Networking	All
	8:00 AM - 8:15 AM	15	Call to Order, Introductions, and Agenda Review	Mr. Dan Lynch
	8:15 AM - 9:00 AM	45	NDIA IPMD Update, Survey Results	Mr. Dan Lynch
	9:00 AM - 9:45 AM	45	Keynote Speaker Legislative and Regulatory Trends in Policy	Mr. Will Goodman
	9:45 AM - 10:00 AM	15	*Break*	
	10:00 AM - 11:30 AM	90	Panel: Introduction to the DCMA Data Driven Analysis Mr. Tom Carney (Lockheed), Ms. Dianna Patterson-Williams (Raytheon), Mr. Scott Foley (GD Electric Boat), Ms. Joan Ugljesa (XML Working Group)	Facilitator: Mr. Gary Humphreys
	11:30 AM - 11:45 AM	15	Contracts Working Group (Introduction, Charter)	Mr. Dale Gillam
	11:45 AM - 1:00 PM	75	*Lunch (everyone on their own)*	
	1:00 PM - 2:00 PM	60	Panel: Agile and EVM	Facilitator: Ms. Kathy Dailey
	2:00 PM - 2:30 PM	30	DoD Risk Management Guide	Mr. Vaughn Schlegel
	2:30 PM - 2:45 PM	15	*Break*	
	2:45 PM - 2:55 PM	10	Planning and Scheduling Working Group: PASEG Update	Mr. Yancy Qualls
	2:55 PM - 3:45 PM	50	Clearinghouse Update, Discussion of Open Issues and Concerns	Mr. Pete Wynne and Mr. Gary Humphreys
			IPMD Working Group Sessions	
	3:45 PM - 5:15 PM	90	Clearinghouse, Program Management, Services & Sustainment, Surveillance Guide, Planning & Scheduling, Agile & EVM, Prime/Subcontractor, Contracts	
Wednesday, 26 August 2015 Joint Government/Industry Meeting	7:30 AM - 8:00 AM	30	Registration / Networking	All
	8:00 AM - 8:15 AM	15	Call to Order, Introductions, and Agenda Review Upcoming IPM Conference	Mr. Dan Lynch
	8:15 AM - 9:00 AM	45	BBP 3.0 Presentation	Ms. Mary Margaret Evans
	9:00 AM - 10:00 AM	60	Panel: Managing a Program without an EVM Requirement Dennis E. Nihiser (SAIC); Steve Barnoske (LM); Mark Malatesta (Tauri Group); Teresa Camp (P&W); Gerry Becker (Harris)	Mr. Bill Altman
	10:00 AM - 10:15 AM	15	*Break*	
	10:15 AM - 11:10 AM	55	Acquisition Intelligence Requirements	Mr. Gary Bliss
	11:10 AM - 12:00 PM	50	CAPE Presentation	Ms. Bess Dopkeen
	12:00 PM - 1:15 PM	75	*Lunch (everyone on their own)*	
	1:15 PM - 2:05 PM	50	PARCA Update	Mr. Gordon Kranz
	2:05 PM - 2:45 PM	40	WBS (MIL-STD 881 Version D) Update	Mr. Neil Albert
	2:45 PM - 3:00 PM	15	*Break*	
	3:00 PM - 3:50 PM	50	DCMA BBP 3.0 Initiatives	Mr. Joe Sweeney, Mr. David Kester, Mr. Shane Olsen
	3:50 PM - 4:25 PM	35	NDIA System Engineering Division Presentation	Mr. Frank Serna
	4:25 PM - 4:40 PM	15	Schedule Margin Resolution	Mr. Yancy Qualls
	4:40 PM - 4:55 PM	15	Reserved for Working Group Outbriefs	
	4:55 PM - 5:00 PM	5	Summary and Adjournment	Mr. Dan Lynch

Location
  Varies depending on sponsorship
  DC is default

Cost
  $0 to $250 dependent on sponsorship

Day One – Industry Only

Day Two – Joint Govt/Industry

Social/Networking Event evening of Day One
  Can be hosted or "no-host"

Lunches can be hosted or "on your own"

Working Group Overview

- **EVMS for Agile Development**

- **Civilian Agency Industry Working Group (CAIWG)**

- **Program Management**

- **Clearinghouse**

- **NDIA Guides Steering Group**

- **Planning & Scheduling**

- **Prime and Subcontract Management**

- **Services & Sustainment**

- **Contracts**

- **CSDR**

Participants Welcome!!

EVMS for Agile Development

Overview

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   **Co-Chair Open**

- **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**
- **Guide describing the application of EVMS in an Agile development environment in subgroup areas**
- **Guidance will be released in interest areas as available**

Civilian Agency Industry Working Group

Overview

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@mcri.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

PM Working Group

Overview

Objective is to broaden the focus and membership of the IPMD to share best practices among program management professionals and discuss methods and tools in addition to earned value management

Leadership

Bill Altman
altmab@battelle.org

Connie Dowler
connie.dowler@lmco.com

- **Meets monthly on 3rd Wednesday @ 2PM ET for 1 hour via telephone**
- **Developed IPMD brochure and PowerPoint overview on IPMD for use at selected venues**
- **Identifies PM oriented topics and speakers for IPMD meetings**
- **Manages IPMD LinkedIn site – Industry only; >650 members**
- **Predictive Measures Guide**
- **Working engagement with NDIA SED, Aug meeting panel discussion "Managing Program without an EVM Requirement"**

Clearinghouse Working Group

Overview

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

Dan Lynch
Daniel_L_Lynch@Raytheon.com

Gary Humphreys
ghconsult@aol.com

- Maintain repository of EVMS issues and Interpretative guidance
- Clearinghouse Charter, Process, and Submission Forms Located on the IPMD website

http://www.ndia.org/Divisions/Divisions/IPMD/Pages/WorkingGroups.aspx

IPMD Guides Steering Group

Overview

Maintain the five OMB recommended IPMD Guides as well as other IPMD guides to reflect the latest changes in the EVMS Standard (EIA-748) 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

Jeff Poulson
jeff.poulson@raytheon.com

Randy Steeno
randall.r.steeno@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)**

August 2015 Guide Status and Updates

Guide	Update Lead	Status
Intent	Mike Cuticchia, Jeff Poulson	Reaffirmation Version C update published April 2014
IBR	Neil Albert	Revision 2 published March 2015
Surveillance	Dale Gillam	***Revision 2 approved & published July 2015***
Application	Guides Steering Group	Revision 2 published January 2015
Acceptance	Buddy Everage	Revision 1 published March 2013 ***Revision 2 for 2016; B. Everage to Lead***
PASEG	Planning and Scheduling Working Group	Version 2.0 published June 2012 Version 3 update in process – current plan: • Distribute to membership for review in Dec • Vote at January 2016 meeting
Predictive Measures	Program Management Working Group	First edition published September 2014
Agile	Earned Value Management for Agile Programs	Version 1.0 will be published 4th Quarter 2015

Note: Current published guides have been updated to reflect the change from PMSC to IPMD as well as change from "ANSI/EIA-748" to "EIA-748"

Planning & Scheduling Working Group

Overview

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

- **Maintain the Planning and Scheduling Excellence Guide (PASEG) for use by both Industry and Government Agencies**
  - **http://www.ndia.org/Divisions/Divisions/IPMD/Documents/PASEG/**
- **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

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

Caroline_M_Cremisi@raytheon.com   **Anna Blachman**

- **<u>Output</u>** -   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.

Services & Sustainment Working Group

Overview

Investigate and document the useful application of EVM concepts to contracts containing sustainment work (O&M, Services, and other work typically treated as Level of Effort) for the purpose of improving stakeholder assessments of performance.

Leadership

Jason Miller
Jason.W.Miller@boeing.com

John Duval
jduval1@csc.com

- **Formulate recommendations on policy**
- **Include tailoring recommendations, implementation approaches, training material, and best practices**
- **Researched other industries to gain better understanding of processes**

Contracts Working Group

Overview

Focus is to get alignment between the contract management organization and Integrated Program Management (IPM) practitioners, with emphasis on EVM and project scheduling practices, and on interpretation of requirements as it relates to contractual application of these practices

Leadership

Lisa Wolf
wolf_lisa@bah.com
NDIA IPMD

Jean Lohier
jean.lohier@att.com
NCMA Tysons

- **Establish a Formal Channel of communication between NDIA-IPMD, NDIA's Procurement Division, and the National Contract Management Association (NCMA)**
    - **Quarterly / Semi-Annual Meeting**
    - **Discussion of Learning Opportunities**
    - **Collaboration Meetings**
- **Develop a set of educational materials and provide training at various venues**

Meeting Schedule

- ## NDIA IPMD Upcoming Events
  - ### 2015
    - Nov 16-18, IPM Workshop, Marriott, Bethesda, MD
  - ### 2016
    - Jan 26-27, Lockheed-Martin, Orlando, FL
    - April TBD, SAP, King of Prussia, PA
    - August TBD, Pratt & Whitney Hartford, CT

- ## Sponsor(s) needed for 2017