



NDIA IPMD Guides: An Overview

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September 13, 2022

www.ndia.org/divisions/IPMD

9/13/2022

NDIA IPMD Guides - Overview



- **Purpose of the Guides:**
 - To reflect the latest changes in the EVMS Standard, related government policies/ regulations and best practices for IPM.
- **Where are the Guides?**
<https://www.ndia.org/divisions/ipmd>
- **How to get more involved in IPMD?**
 - Support/Lead to update a Guide
 - Contact any Board Member

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Integrated Program Management

Mission

The purpose of the Integrated Program Management Division (IPMD) is to lead the advancement of integrated program management through industry and government partnership.

Objective

The Division's objectives are to:

- Provide thought leadership in Integrated Program Management (IPM). The Division achieves this by conducting forums and meetings to advance IPM practices as well as providing and publishing industry perspectives on IPM topics. As the author and steward of the EIA-748 Standard for Earned Value Management Systems (EVMS), the Division also creates and maintains industry standards and guides.
- Collaborate with key stakeholders. The Division proactively engages and participates with

Integrated Program Management (IPMD)

- Board of Directors
- Upcoming Events
- Previous Meeting Presentations
- Previous Webinar Presentations
- Division Guides and Resources**
- Awards
- IPMD Committees

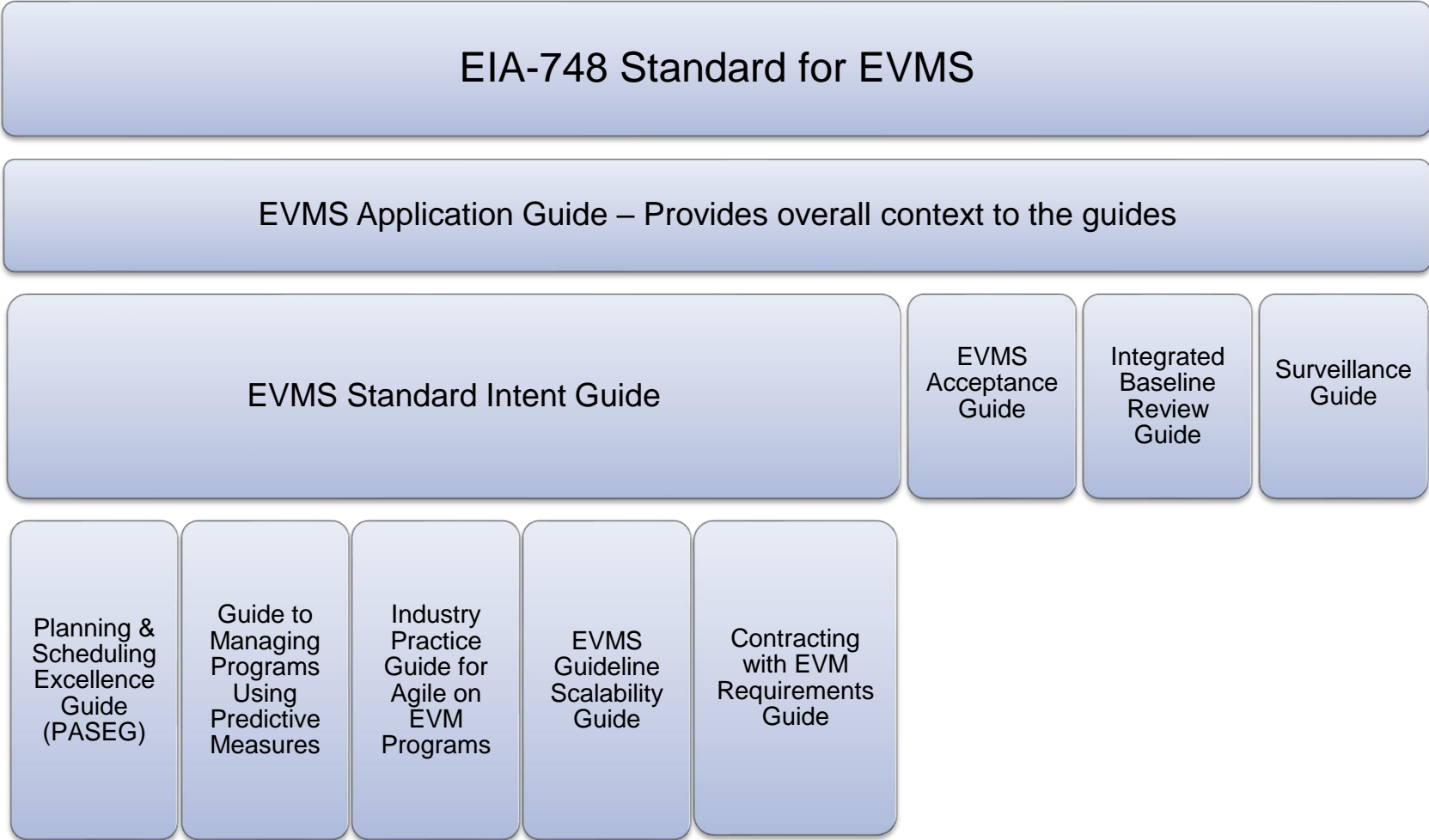
SEPTEMBER 2022 GUIDE STATUS & UPDATES



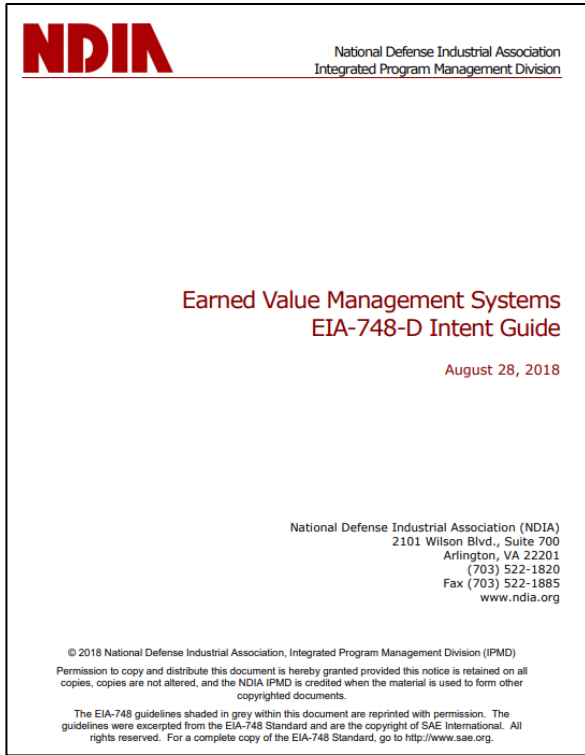
Guide	Update Lead	Status
Intent	EIA-748 Reaffirmation Working Group, Guides Steering Committee	Reaffirmation Version D available from SAE EIA-748 D update published August 2018 Note: update will be parallel activity to EIA-748 Rev E
IBR	“CJ” Jones	Revision 3 published September 2019 – Update in process (minor refresh)
Surveillance	Dan Bellovary	Revision 4 published October 2021
Application	Guides Steering Committee	Revision 3 published May 2018 – Rev 4 vote to approve at September meeting
Acceptance	Shane Olsen (Neil Albert as liaison to CAIWG)	Revision 3 published September 2019 – Due for update (minor refresh)
PASEG	Planning and Scheduling Committee	Version 4.0 published September 2019 – Version 5.0 vote to approve at September meeting
Predictive Measures	PM Committee	Revision 2 published March 2021
Agile and EVM	Agile Committee	Revision 1.3 published May 2019 Committee is working on the next update
Scalability Guide	John Duval, Neil Albert, CAIWG	Revision 2 published January 2020
Guides Master Definitions List	Guides Steering Committee	Posted on NDIA web site – last updated April 2022
Agency EVMS Policy Summary	Dale Gillam	Last updated in 2016 – Update in process
Contracting with EVM Requirements	Contracts Committee	New Guide –vote to approve at September meeting

Relationships between the IPMD Guides

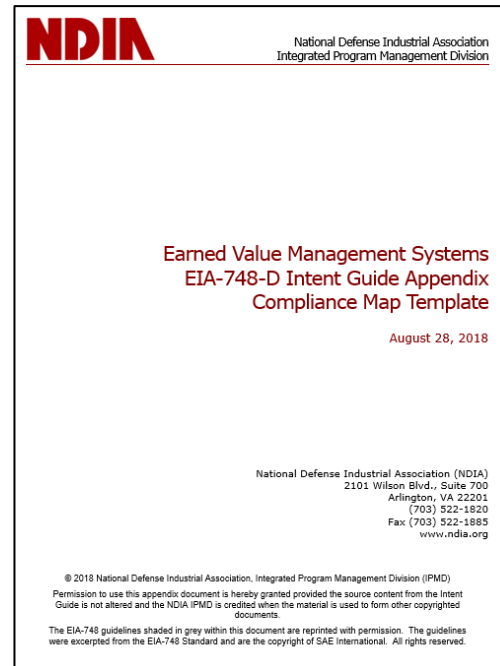
- No formal hierarchy – the EIA-748 is the basis for all guides



NDIA IPMD EVMS Intent Guide & Compliance Map

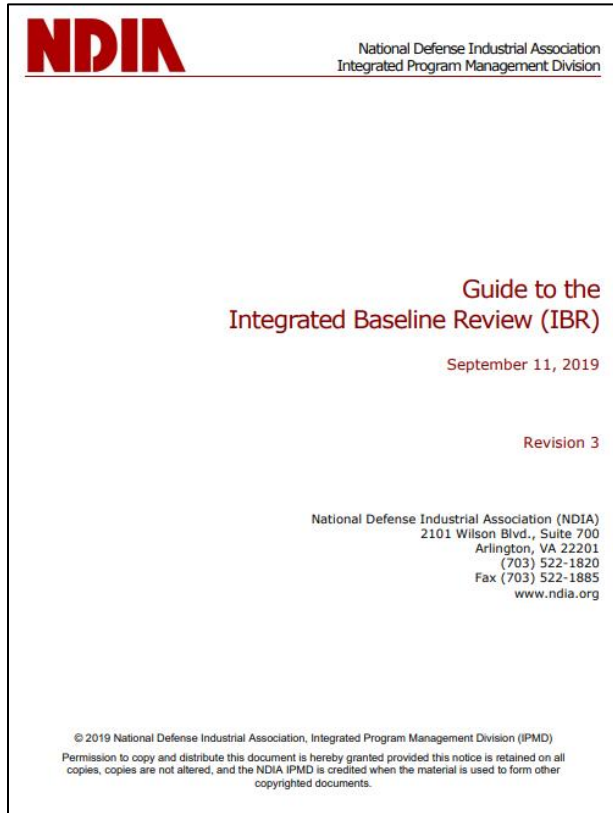


This guide provides additional insight into the 32 guidelines identified in the EVMS standard. For each guideline, the Intent Guide describes the value to management, more information about the intent of the guideline, typical attributes, and what objective evidence can be used to demonstrate a guideline has been met.



The purpose of this separate appendix is to provide a source document that can be used as a starting point for a contractor, subcontractor, or government agency that needs to develop a compliance map to the EIA-748 EVMS Guidelines for their business process. The template can be tailored as needed to fit a given business environment. The compliance section for each guideline in the template will need to be completed based on how a company or agency does business.

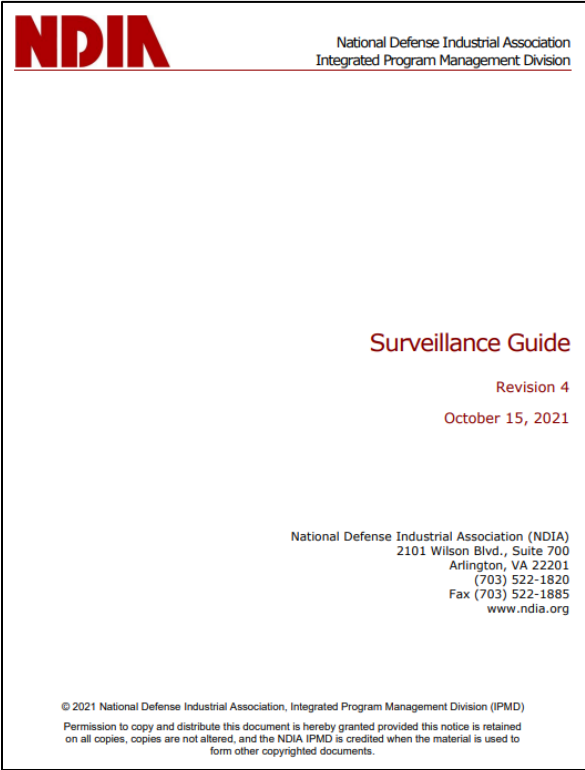
NDIA IPMD EVMS IBR Guide



Integrated Baseline Reviews (IBRs) are required, either pre-award or post-award, to ensure authorized work is adequately planned and resourced, and to establish a mutual understanding of the risks and opportunities inherent in a Performance Measurement Baseline (PMB). The purpose of this document is to provide guidance for the preparation and execution of an IBR. The intent of the guide is to improve the consistency of the IBR process for all users (customers and suppliers). This guide discusses the need for an IBR, the types of IBRs, when and how each should be conducted, and the necessity to make the IBR an element of the ongoing project management process. This guide also discusses integrating the IBR process with risk and opportunity management practices.

Version 4 of the IBR Guide is forthcoming with a minor refresh.

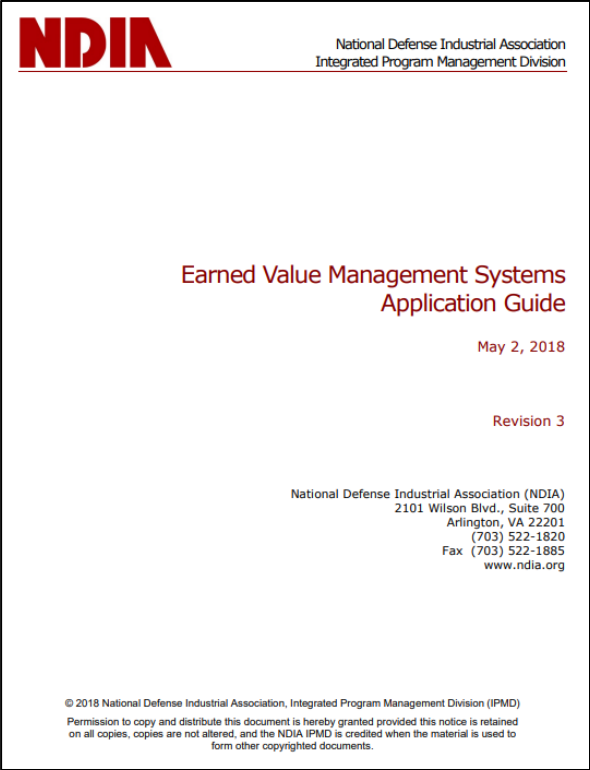
NDIA IPMD EVMS Surveillance Guide



This document provides surveillance guidance and describes the characteristics of successful EVMS Surveillance Programs. It is intended to assist suppliers in the planning and execution of both internal and subcontractor surveillance, as well as to provide guidance for customers and organizations with EVMS oversight responsibility.



NDIA IPMD EVMS Application Guide



This guide is designed to assist any organization with the planning process to effectively implement and use an EVMS through all phases of the acquisition life cycle. Appendix A of this document provides a summary of the EVMS contract clauses and agency policy documents that support OMB Circular A-11, Part 7, Capital Programming Guide, a supplement to A-11, "Planning, Budgeting, Acquisition and Management of Capital Assets."

Voting to approve Revision 4



NDIA IPMD EVMS Acceptance Guides

NDIA National Defense Industrial Association
Integrated Program Management Division

Earned Value Management System
Acceptance Guide

September 11, 2019

Revision 3

National Defense Industrial Association (NDIA)
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This document provides guidance and a standard framework to prepare a contractor or a government agency, in the case where the EVM requirement is applied to the government work, to successfully demonstrate that the EVMS being used complies with the EIA-748 32 Guidelines and produces program/project performance data that contributes to sound capital investment decisions.

NDIA IPMD PASEG



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Integrated Program Management Division

Planning & Scheduling Excellence Guide (PASEG)

September 12, 2019

Version 4.0

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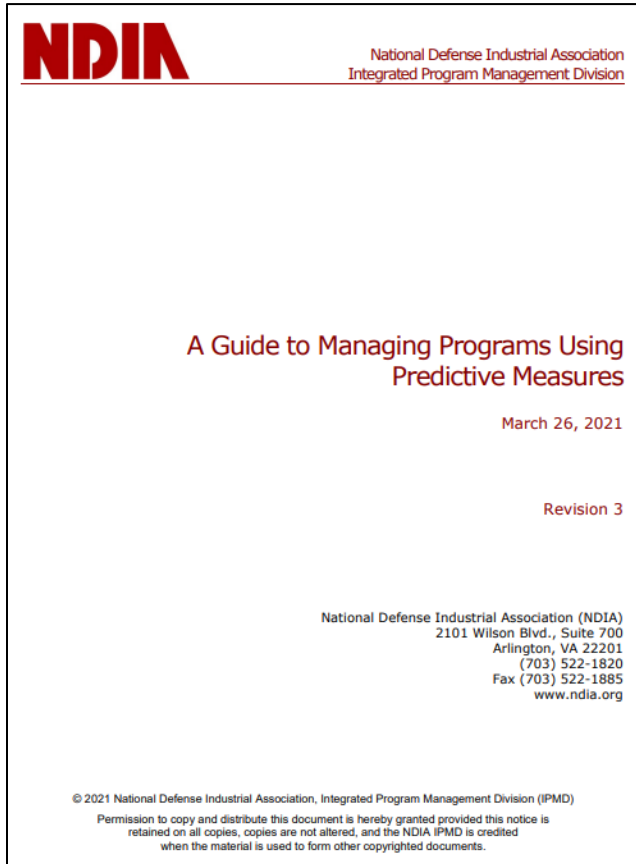
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This joint industry and government guide is geared for the Program Leadership Team and Planning/Scheduling professionals to recognize the value of an Integrated Master Schedule (IMS) by understanding scheduling concepts, promoting good scheduling processes, and realizing the consequences of poor processes. Using the PASEG document, the program team can build and maintain more robust and dynamic schedules that provide a roadmap for improved program execution.

Voting to approve Version 5.0

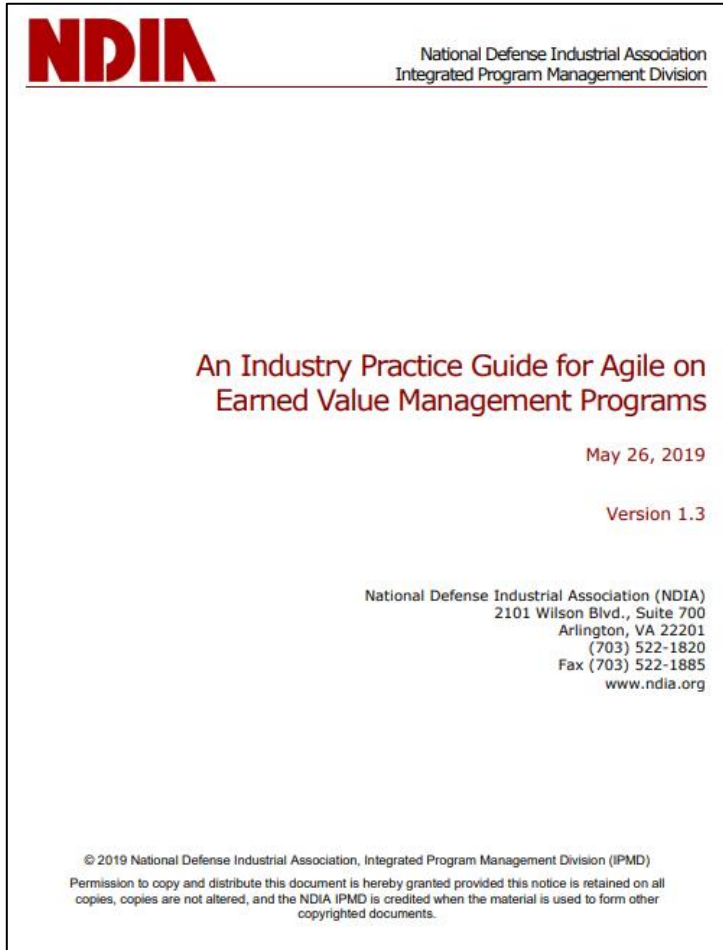
NDIA IPMD EVMS Predictive Measures Guide



The Predictive Measures Guide is a compilation of more than 30 Industry and Government measures that assists a Program Manager in meeting program objectives. These measures provide a comparison of current program status against the planned measures. EVM as a management approach should be supplemented with additional measures and metrics during the monitoring and controlling phase to attain a more comprehensive understanding of current performance and to help management make well-informed decisions. These additional measures and metrics can provide valuable predictive indicators that can be used to develop and implement effective mitigation plans.

The intended audience are organizations that are looking for standard approaches to manage programs. It is not intended to provide a new set of standards that would be required to assess program performance, but instead provide a “menu” of typical measures that could be applied. Some metrics are better suited for certain applications than are others. Each organization should decide which measures are most appropriate for its environment and select measures suitable for its purposes.

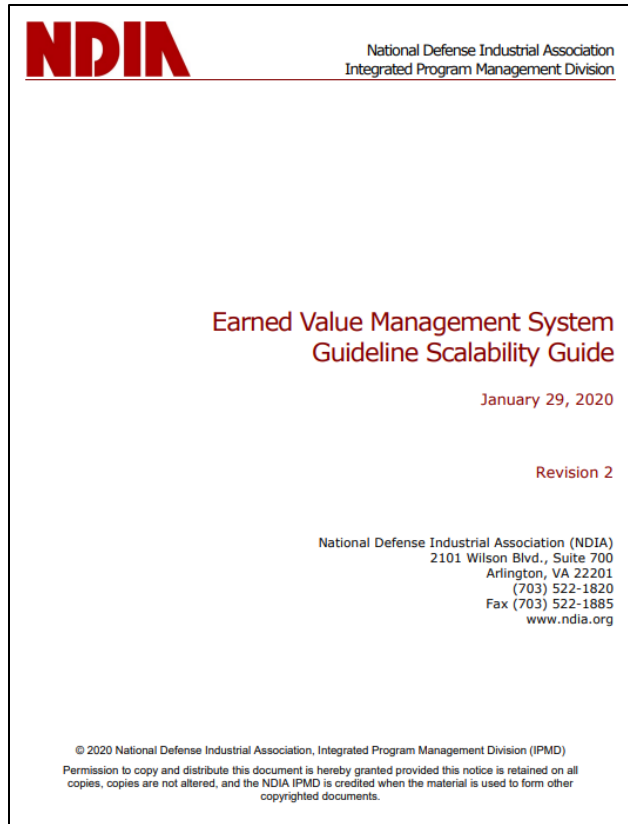
NDIA IPMD Industry Practice Guide for Agile EVM



Agile has emerged as the leading industry software development methodology and has seen growing adoption across the DoD and other federal agencies. The demand for responsiveness and efficiency extends to all aspects of system development and delivery, starting with negotiation of the contract, applicable CDRLs, and effective implementation of EVM. The EVM system must support these changing demands while enabling cost and schedule performance measurement against the Performance Measurement Baseline (PMB). This need creates challenges to applying EVM to Agile development programs. This guide was created to address these challenges. The guide provides practices drawn from lessons learned by multiple aerospace and defense firms and their software development activities. It discusses a recommended approach for the WBS, IMP and IMS content, Control Accounts, Work Packages, and Planning Packages to be used on an Agile development program. It also discusses program performance measurement.

An update to this guide will be forthcoming.

NDIA IPMD EVMS Scalability Guide

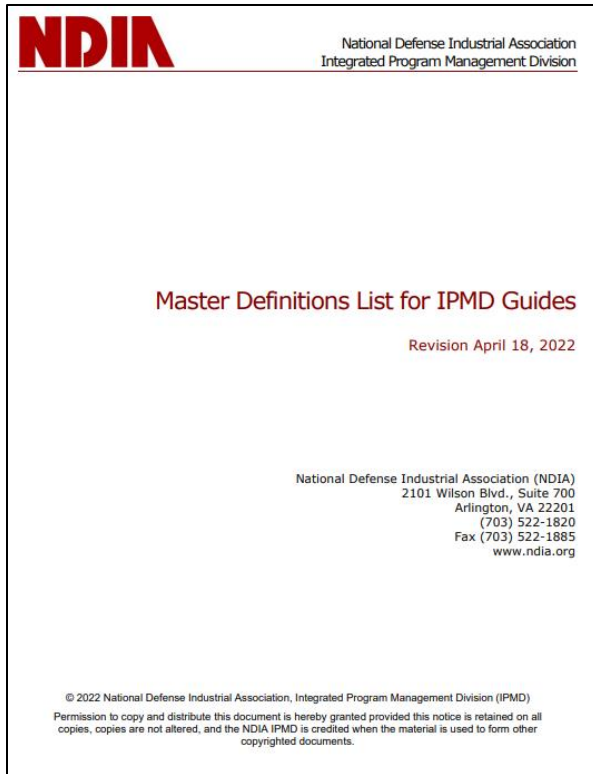


The EVMS Guideline Scalability Guide was produced to support any agency or organization which does not have a contractual requirement to implement EVMS but would still benefit from using EVM practices by implementing a scaled EVMS. It is intended for industry or government project personnel within:

- 1) entities such as universities, laboratories, small businesses, suppliers, and vendors with small to mid-size projects;
- 2) large corporations with small projects/contracts or that issue contracts to small businesses, suppliers, and vendors; and
- 3) any government agency with small contracts.

The guide focuses on scaling the EVMS Standard 32 Guidelines in a way that reflects the size, complexity, risk, and type of work involved. A scaled EVMS recognizes small projects do not require the same level of detail data and control discipline associated with large, complex projects.

NDIA IPMD Guide Master Definition List



This guide contains a common master list of abbreviations, acronyms, and definitions the IPMD working groups can use when producing deliverables. The intent is to provide a single source of definitions to increase consistency between the IPMD Guides as part of the process of creating new documents or updating existing documents. This document will be updated regularly to reflect working group needs, comments, or suggestions.



NDIA IPMD Federal Agency EVM Policy Summary

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U.S. Federal Agency EVMS Policy Summary
Dated 10/18/2016

Earned Value Management (EVM) is a project management process that effectively integrates a project's scope of work with schedule and cost elements for optimum project planning and control. Federal Acquisition Regulation (FAR) Subpart 34.2 requires an Earned Value Management System (EVMS) for major acquisitions for development, in accordance with OMB Circular A-11. The Government may also require an EVMS for other acquisitions in accordance with agency procedures. When an EVMS is required, the Government is also required to conduct an Integrated Baseline Review (IBR). FAR Subpart 34.2 requires that EVM systems comply with the Electronic Industries Alliance (EIA) Standard 748. Government agencies are encouraged to tailor their EVM systems to the unique needs of their acquisitions.

The complete text for FAR Subpart 34.2 can be found here: https://www.acquisition.gov/far/html/Subpart%2034_2.html

The purpose of this document is to summarize the EVM policy of the various federal agencies for reference purposes only; this content is subject to change. While every attempt has been made to be as accurate as possible, agency EVM policies are periodically updated as are referenced web site addresses. Please refer to the official agency EVM policy for specific details or updated information. A general resource for various federal government regulations, standards, Data Item Descriptions (DIDs), policy manuals, and related documents includes <http://assistdocs.com> or <http://everyspec.com>.

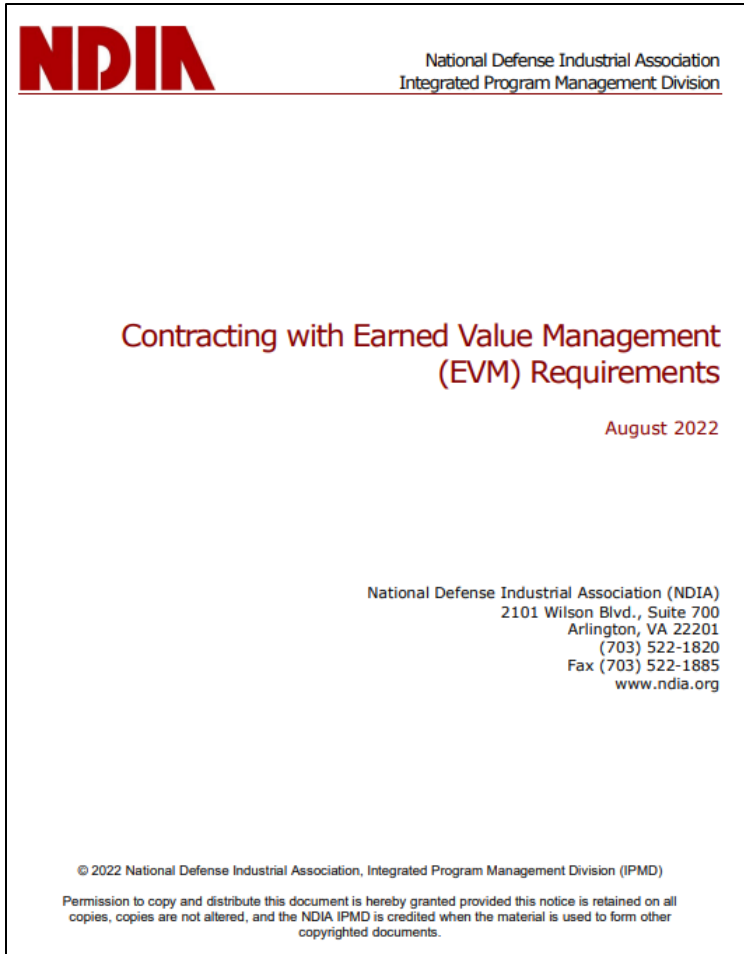
The intent is to continually update this document as more information is discovered or made available to the NDIA IPMD. Please contact the Chair or Vice Chair of the NDIA IPMD (identified at www.ndia.org/IPMD) if you would like to submit updated or additional content for this document.

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This IPMD reference document summarizes the EVM policy of the various federal agencies. This document will be updated on a regular basis as more information is discovered or made available to the NDIA IPMD. Contact the Chair or either Vice Chair to submit updates or additional content for this document.

Update is in progress.

NDIA IPMD Contracting with EVM Requirements Guide



This new guide is intended to enhance the alignment between contract management and integrated program management practitioners, from pre-award through closeout of a contract that includes requirements for an Earned Value Management System (EVMS) or other program, or performance management requirements for use of Earned Value Management (EVM) best practices or techniques.

To be published in September 2022

Contracts Committee Thanks for NDIA IPMD Contracting with EVM Requirements Guide



- During the IPMD Member comment period from August 4th – September 3rd, we received minor comments from members
- All comments were reviewed and incorporated, and the guide is ready for member voting
- Thank you as well to the IPMD Board of Directors and Members that provided feedback!

Big thanks and kudos to the Contracts Committee Sub-Leads and Members for their passion and time writing and editing this guide:

Donald Shannon (Sub-Lead), Jeannette Driscoll (Sub-Lead),
Christina Graves (Sub-Lead), Selena Veach (Sub-Lead), Joe Kusick (Member),
John Wilkinson (NCMA CMS Advisor), and Tej Sujlana (IPMD Board Liaison)

...And many thanks to our former members and contributors:

Christina Derrico (Sub-Lead), Marty Doucette (member), Gordon Kranz (Sub-Lead), Joel Little (Gov Advisor-DAU), Ed Silvia (Member), Scott Rummel (Member), Lisa Hastings (IPMD Board Liaison), Mike Pelkey (Gov Advisor-OUSD), Eric Oliver (Gov Advisor-ADA PM) Matoka Forbes (Gov Advisor-FAA)

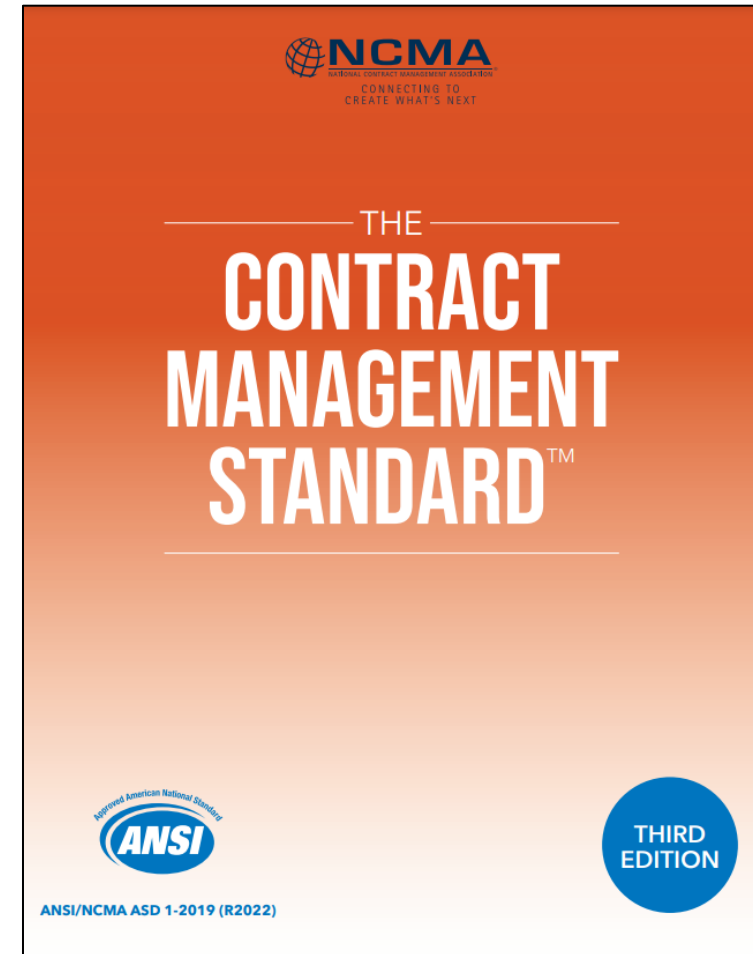
-Elizabeth Schloer and Allie Stanzione (Co-Leads)

NDIA IPMD Contracting with EVM Requirements Guide Overview



The “Contracting with EVM Requirements Guide” includes:

- Sections to familiarize readers with Contract, Project/Program Management, and EVM Fundamentals
- A Roles and Responsibilities section with a RACI for Buyer and Seller activities that links to the contract and project management lifecycle sections:
 - Pre-Award and Award – Solicitation and Project Start-up
 - Post Award – Execution and Closeout
- The guide aligns with the NCMA ANSI Contract Management Standard, Third Edition



NDIA IPMD Contracting with EVM Requirements Guide Rollout



- **The Contacts Committee will socialize the NDIA IPMD Contracting with EVM Requirement Guide within the contracting and EVM communities**
 - Writing an article and a guide advertisement for the NCMA Magazine
 - Creating a series of NCMA webinar trainings that will include real life scenarios where the RACI may be utilized for guidance
 - Identifying program management and EVM-related forums to speak at



Guide Update Q&A