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
• Initially established as the Program Management Systems Committee within the Procurement Division
  – VERY Earned Value Management / Compliance centric

• Finalized creation of Integrated Program Management Division (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; Program Management; Prime & Subcontract Management
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 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

<table>
<thead>
<tr>
<th>Time</th>
<th>Duration</th>
<th>Topics</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 AM - 8:00 AM</td>
<td>30</td>
<td>Registration / Networking</td>
<td>All</td>
</tr>
<tr>
<td>8:00 AM - 8:15 AM</td>
<td>15</td>
<td>Call to Order, Introductions, and Agenda Review</td>
<td>Mr. Dan Lynch</td>
</tr>
<tr>
<td>8:15 AM - 9:00 AM</td>
<td>45</td>
<td>NDA IPMD Update, Updates</td>
<td>Mr. Will Goodman</td>
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<tr>
<td>9:00 AM - 9:45 AM</td>
<td>45</td>
<td>Legislative and Regulatory Trends in Policy</td>
<td>Mr. Will Goodman</td>
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<tr>
<td>10:00 AM - 11:30 AM</td>
<td>90</td>
<td>Panel: Introduction to the DCMA Data Driven Analysis</td>
<td>Mr. Dan Lynch, Ms. Dianna Patterson-Williams (Raytheon), Mr. Scott Foley (GD Electric Boat), Ms. Joan Ugljesa (XML Working Group)</td>
</tr>
<tr>
<td>11:30 AM - 11:45 AM</td>
<td>15</td>
<td>Contracts Working Group (Introduction, Charter)</td>
<td>Mr. Dale Gillam</td>
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<tr>
<td>11:45 AM - 1:00 PM</td>
<td>75</td>
<td>Lunch (everyone on their own)</td>
<td>Mr. Dale Gillam</td>
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<tr>
<td>2:00 PM - 2:30 PM</td>
<td>30</td>
<td>DoD Risk Management Guide</td>
<td>Mr. Vaughn Schlegel</td>
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<tr>
<td>2:30 PM - 2:45 PM</td>
<td>15</td>
<td>Break</td>
<td>Mr. Dan Lynch</td>
</tr>
<tr>
<td>2:45 PM - 2:55 PM</td>
<td>10</td>
<td>Planning and Scheduling Working Group: PASEG Update</td>
<td>Mr. Yancy Qualls</td>
</tr>
<tr>
<td>2:55 PM - 3:45 PM</td>
<td>50</td>
<td>Clearinghouse Update, Discussion of Open Issues and Concerns</td>
<td>Mr. Pete Wyne and Mr. Gary Humphreys</td>
</tr>
<tr>
<td>3:45 PM - 5:15 PM</td>
<td>90</td>
<td>IPMD Working Group Sessions</td>
<td>Mr. Dan Lynch</td>
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</tbody>
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**Location**
- Varies depending on sponsorship
- DC is default

**Cost**
- $0 to $250 dependent on sponsorship

**Day One – Industry Only**
- Social/Networking Event evening of Day One
  - Can be hosted or “no-host”
- Lunches can be hosted or “on your own”

**Day Two – Joint Govt/Industry**
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!!
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.

- 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 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

Leadership

Kathy Dailey

Co-Chair Open
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/

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

Leadership

Jerry Jones
jerry.jones@faa.gov

Neil Albert
nalbert@mcri.com
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”
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

- 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
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

<table>
<thead>
<tr>
<th>Guide</th>
<th>Update Lead</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Intent</td>
<td>Mike Cuticchia, Jeff Poulson</td>
<td>Reaffirmation Version C update published April 2014</td>
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<tr>
<td>IBR</td>
<td>Neil Albert</td>
<td>Revision 2 published March 2015</td>
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<tr>
<td>Surveillance</td>
<td>Dale Gillam</td>
<td><strong>Revision 2 approved &amp; published July 2015</strong></td>
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<tr>
<td>Application</td>
<td>Guides Steering Group</td>
<td>Revision 2 published January 2015</td>
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<tr>
<td>Acceptance</td>
<td>Buddy Everage</td>
<td><strong>Revision 2 for 2016; B. Everage to Lead</strong></td>
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| 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”
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
- 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

Anna Blachman

Output - 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.
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.

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

Leadership

Jason Miller  
Jason.W.Miller@boeing.com

John Duval  
jduval1@csc.com
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