



Planning and Scheduling Committee (PASC)

Co-Chairs Yancy Qualls & Lisa Hastings

PASC (Planning and Scheduling Committee)

- **IMS Only DID Update**
- **IPMDAR DID Rev D Update**
- **Production IMS Subcommittee Update**
 - Discussing LOB DID in lieu of IPMR DID and identification of critical material in the IMS
- **Schedule Margin**
 - Traceability to a Risk Register (EVMSIG) vs a Risk Management Process (IPMDAR IG). IIR submitted in ~2019.
- **Committee Poll w/ Slido** (time permitting)

Schedule Margin (SM) Issue

DCMA CAR(s) issued at least in part due to SM not being traceable to quantified risk impacts

- "Schedule margin (SM) baseline and forecast basis of duration are not relatable to quantified risk impacts."
- "Without robustness in the quantification of risk impact represented through the schedule margin task duration, the resulting forecast dates of the impacted events cannot be relied upon. "

Does this levy a requirement that SM must be traceable to the Risk Register?

Schedule Margin in the IPMDAR

IPMDAR:

- 2.4.2.19 Schedule Margin. If Schedule Margin is used, clearly and consistently identify all schedule margin tasks. (Refer to SPD FFS 2.2.9, field TaskSubtypeID)
 - 2.4.2.19.1 Use schedule margin only as the last task before key contractual events, significant logical integration/test milestones, end item deliverables, or contract completion.
 - 2.4.2.19.2 Explain changes to the status of schedule margin tasks that impact the program’s primary critical path in the Detailed Analysis section of the Performance Narrative Report. See the Detailed Analysis table in Section 2.4.3 for additional information.

The IPMDAR is silent on the source (“traceable to”) of Schedule Margin

Schedule Margin Confusion



DEPARTMENT OF DEFENSE
EARNED VALUE
MANAGEMENT SYSTEM
INTERPRETATION GUIDE
(EVMSIG)

“Schedule margin.....must be traceable to the risk register and consistently identifiable in the IMS.”

Implementation & Tailoring Guide

“The current duration and rationale for each schedule margin task shall be controlled as part of a formal risk management process.”

Risk Register

vs.

Risk Management Process

Schedule Margin in DECM



EVMS Test Metric Specification

1. Guideline No: 06	2. Test Metric ID: 06II101b	3. Test Type: Manual
4. Attribute/Intent Definition: 06II: Schedule margin, an optional management method for accommodating schedule contingencies, must be traceable to the risk register and consistently identifiable in the IMS.		
8. Data Elements Required: 03 EVM System Description 11 Integrated Master Schedule 11C Actual Start Date 11A Actual Finish Date 11AJ Successors 11AM Task/Activity/Milestone UIDs 45 IMS Data Dictionary 62 Risk Management Process/ Plan		
10. Instructions: <ol style="list-style-type: none">Identify and count all schedule margin tasks/activities:<ol style="list-style-type: none">with duration not defensible through a formal Risk Management processwith Actual Start date not equal to Actual Finish datewith a successor other than a key contractual event, significant logical integration/test event, end item deliverable, or contract completionnot identified in the IMS as defined in the contractor's EVMSAdd the number of schedule margin tasks/activities identified in step 1; this is the value (X) of the test metric.Use block 7 as an indicator in the overall Risk Assessment to determine if further evaluation is warranted.		

Definition includes "Risk Register"...

...but Data Elements and Instructions specify a "Risk Management process"

ADA Clarification History



- An EVM Interpretation and Issue Resolution (IIR) request was submitted (2019?) to ADA to clarify the wording discrepancy between the EVMSIG (“Risk Register”) and the IPMDAR Implementation and Tailoring Guide (“Risk Management Process”).
- A memo was to be released to confirm the accuracy of the wording in the Implementation and Tailoring Guide (“Risk Management Process”).
- 2021 E-mail in response to a follow-up on the memo that was not issued:

This is not part of our open IIRs, so my guess is that it was probably closed some time ago. The understanding is that SMs must be part of a risk management process. That process should allow a CAM or PM to understand the where, when, why and duration of any SM task.

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Schedule Margin (common industry perspective)



Typically captured in the Risk Register?

Why are Program Events forecasts risky?

<ul style="list-style-type: none">• Duration Variation<ul style="list-style-type: none">○ Durations are “estimates” and as such commonly prove to be wrong (by a little or a lot)	NO
<ul style="list-style-type: none">• Schedule Risk Events<ul style="list-style-type: none">○ Known issues that may or may not occur, but if they do, there will be a delay (by a little or a lot)	YES
<ul style="list-style-type: none">• Merge Bias<ul style="list-style-type: none">○ As the number of parallel paths leading to an event increases, the likelihood of a delay to that event also increases○ Amplifying factor for Duration Variation and Schedule Risk Events	NO

Not all Risk (modeled by SM) to Program Events comes from a formally tracked Risk Event, and therefore, would not necessarily be traceable to the Risk Register (but should follow the program’s Risk Management process)