



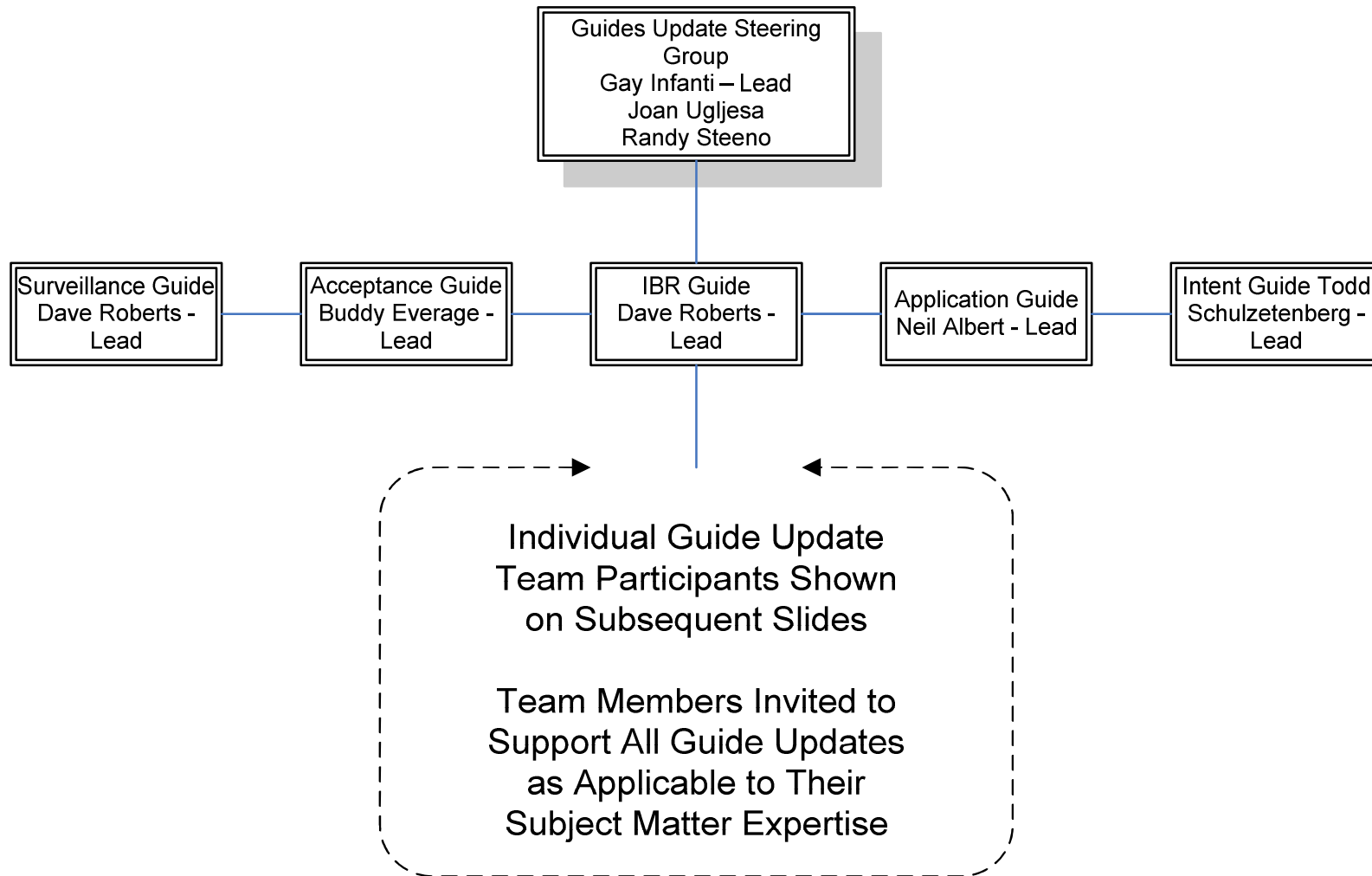
NDIA PMSC Guides Update Project

Gay Infanti
Dave Roberts

Objectives

- Review and update the five OMB-recommended PMSC guides to reflect
 - Changes to ANSI/EIA 748, policies, and regulations
 - Lessons learned and advancements in best practices for integrated program management
- Achieve greater consistency in content, terminology, format, and style among all guides
- Place all guides on a 3-year mandatory review/update cycle from the date of publication of each revision resulting from this project
- Utilize the Guides Update Steering Group
 - To advise the PMSC Board of changes in policy and regulation that should be immediately incorporated in one or more guides
 - To accept requests for out-of-cycle changes and determine:
 - If change is appropriate and warranted
 - If change is immediately required
 - If change should be held for next regular update

Guides Update Project Organization



Accomplishments to Date

- **IBR Guide**
 - Revision 1 completed and published 1 September 2010
- **Surveillance Guide**
 - Completed initial re-write and two rounds of review by PMSC membership and non-DoD agencies respectively
 - All comments reviewed/dispositioned by the team; final version distributed for PMSC membership review on 12/14/10
 - Now seeking formal approval for publication effective 1 February 2011
- **Application Guide**
 - Update in process under leadership of Neil Albert
- **Acceptance Guide**
 - Update in process under leadership of Buddy Everage
- **Intent Guide (last updated June 2009)**
 - Anticipate the need for an out-of-cycle update to the Intent Guide sometime next year; Todd Schulzetenberg slated to lead

Surveillance Guide Update Team

Industry Participants

- Dave Roberts – Navigant Consulting (Team Lead)
- Laura Ayres, Price Waterhouse Coopers
- Pam Brooker – Battelle
- Bill Mendelsohn - ITT
- Scott Gring – Lockheed Martin
- Lucy Haines – Lockheed Martin
- Mitzi Shepard – Lockheed Martin
- Pete Wynne – Lockheed Martin
- Marty Doucette – Pilgrim Companions
- Mike O'Neill- Raytheon
- Andrew Dorsey – Orbital Sciences/Raytheon
- Amy Martz – Raytheon
- Chris Nicholson, Northrop Grumman
- Gay Infanti, Northrop Grumman (Guides Update lead)

Government Participants

- Brian Kong – DOE
- Jim Fountain – DOE
- Tom Bruder - DOE
- Aaron Risdal – Navy

Summary of Final Changes to Surveillance Guide

- Most changes previously briefed at August PMSC meeting and at fall IPM Conference
- Subsequent to receipt of comments from government agency reviewers through mid-November, a few final changes were incorporated into the version distributed for final PMSC review on 14 December
 - Clarified throughout that focus of surveillance is on implementation and use of accepted EVMS vs. compliance with ANSI/EIA 748
 - Differentiated surveillance plan from surveillance program; added definitions for both:

Surveillance Plan - An annual plan that identifies the projects that will be included in surveillance reviews, as well as the frequency and scope of the individual surveillance visits planned for each project.

Surveillance Program – A program comprising an organization’s people, processes, tools and training necessary to execute internal and subcontractor surveillance, independent of customer surveillance activities or requirements, for the purpose of ensuring that its projects are effectively managed to meet their cost, schedule and technical objectives.

Summary of Final Surveillance Guide Changes (cont.)

- Further emphasized the timing and focus of surveillance when the EVMS in use has not yet been validated

In situations where the organization's EVMS has not been previously accepted, the customer must review the proposed EVMS plan and determine that it meets the intent of ANSI/EIA 748 (current version). Once that determination has been made and the proposed EVMS is implemented, surveillance is conducted against the proposed EVMS until the acceptance review occurs. Once accepted, surveillance is performed against the accepted EVMS.

- Clarified definition of System Surveillance as follows:

*System Surveillance - Cross-project EVMS surveillance **is** used to assess ~~the~~ an organization's capability to ~~meet the intent of the guidelines in ANSI/EIA 748~~ ~~guidelines~~ consistently implement and use its validated EVMS on all projects with EVMS requirements. Cross-project EVMS surveillance is also known as system surveillance, because it can identify findings common to multiple projects, which are indicative of systemic problems. System surveillance therefore comprises a summarization of multi-project surveillance results rather than a separate **system-level** surveillance review*

Changes Made Subsequent to December 14th Distribution

- Added estimate to complete (ETC) to list of items for CAM discussion for purpose of ascertaining CAM's EVMS knowledge
- Modified definition of program for consistency with Application and Acceptance Guides as follows:

A capital asset or system. A program may consist of just one project or multiple projects within a portfolio. A major, independent part of a capital asset or system that involves a planned effort to achieve an outcome, the progress toward which is discretely measurable. A program may be comprised of multiple projects, delivery orders, task orders, or other recognized terms indicating a bilateral agreement between contracting parties

- Corrected definition of CBB from Contract Budget *Baseline* to Contract Budget *Base*
- Added JSR - Joint Surveillance Review to list of acronyms

Application Guide

- Update Schedule
 - Draft Review/Submit Comments Dec 8 – Jan 15
 - Team Review Comments Jan 15 – Jan 22
 - Update Document Jan 22 – Jan 31
 - Public Review Feb 1 – Mar 2
 - Public Comment Review Mar 3 – Mar 14
 - Document Final Mar 15 – Mar 30
- Application Guide Update Team
 - *Lead: Neil Albert* MCR
 - Wayne Abba Abba Consulting
 - Sean Alexander VitalThought
 - Marty Doucette Pilgrim Companions
 - Gay Infanti Northrop Grumman
 - Dave Muzio MCR
 - Todd Schulzetenberg Raytheon

Acceptance Guide

- Update Schedule
 - Established team; initial markups submitted 22 December 2010
 - Monthly WebEx meetings planned to discuss and reach team consensus on revisions (3rd Wednesday of each mo. starting 1/19/11, 1-3PM EST)
 - Final document ready for review by PMSC members by August 2011 PMSC meeting
 - November 2011 meeting targeted for publication of revised Acceptance Guide

- Acceptance Guide Update Team

<i>Buddy Everage, MCR – Lead</i>	
Debbie Adams, BAE	Bill Mendelsohn, ITT
Sylvia Alexander, triVariant	Paul Oliver, CH2M Hill
Ivan Bembers, NGA	Pete Peterson, OSD
Shelli DeBardi, MCR	Barbara Philips, L-3 Comm
Greg Hughes, CH2M Hill	Karen Urschel, DOE

- Additional civilian agency participation needed

Discussion

- Questions?
- PMSC Guides are posted on PMSC's website at:
http://www.ndia.org/Divisions/Divisions/Procurement/Pages/Program_Management_Systems_Committee.aspx
- Suggestions or requests for changes to the PMSC Guides may be submitted for PMSC consideration to any one of the Guides Update Steering Committee members at the following email addresses:
 - gay.infanti@ngc.com
 - ugljesa@newvistasgroup.com
 - randall.r.steen@boeing.com