

Integrated Program Management Division Agile EV Panel

8/25/15

There are differences in managerial approach and lifecycle development in the application of Earned Value (EV) and Agile software development

Agile/EV Working Group

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

Chair - Kathy Dailey

WBS/IMS Subgroup Lead – AnnMarie Oien

Data Dictionary Subgroup Lead – Heidi Crookston

Change Management Subgroup Lead – Howard Leibowitz

Data Analysis Subgroup Lead – Kevin McKenna

- **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**

Objectives

- **Contribute to efforts defining optimal Agile/EV practices**
- **Highlight successes and failures and provide a information on the use of Agile and EV**
- **Provide guidance on the use of Agile and EV**

Today's Representatives

- **Current**

- Data Dictionary – Amy Martz, Raytheon
- WBS/IMS – AnnMarie Oien, Lockheed Martin
- Change Management – Andrea Nibert, Leidos

- **Heidi Crookston – Subgroup Lead**
- **David Bulkin**
- **Matthew Kennedy**
- **Amy Martz**
- **Larry Mattivi**
- **Leo Rodriguez**
- **Dave Scott**
- **Bob Ternes**
- **Dave Tervenon**
- **Jeffery Thomas**
- **Robin Yeman**

Data Dictionary Subgroup Status

- **Objectives:**

Produce an EVM Agile data dictionary and thesaurus of Agile terms to harmoniously blend EVM and Agile project management practices.
 Produce diagrams that will visually aid to further help with the understanding based on the data dictionary identified integration points.

- **Achieved: Data Dictionary is baselined, released and under change control**
- **Release plan near term: Anticipate broader release to PARCA/Government baselined, releases and under change control.**
- **Management longer term: Will become part of the NDIA IPMD Agile/Earned Value Guide.**

EVM AGILE DATA DICTIONARY

| EVM Abv. | EVM Link Term Definition | Rationale to Agile/Scrum Term | AGILE Link Related Term |
|----------|-------------------------------------|---|---|
| AC | Actual Cost | Synonymous with ACWP | |
| ACWP | Actual Cost of Work Performed | Cumulative hours and/or direct cost to time now for sprint, feature, story, epic/capability, and work package, as collected by contractor's corporate accounting system. | Sprint, Feature, Story, Epic/Capability |
| ASD | Actual Start Date | The start date for the work package is when work starts on the earliest story in work package | Story |
| AFD | Actual Finish Date | The finish date for the work package is when work ends on the latest story in work package | Story |
| BAC | Budget At Complete | Summary of the work and planning package budgets | Story, Feature, Epic/Capability |
| BAC WP | Budget At Complete for Work Package | Total planned Story Points for the work package translated to hours, dollars, or other measurable terms | Story Points |
| BCWP | Budgeted Cost for Work Performed | Expressed in dollars or as a percentage at the work package. The percent complete for work performed is calculated by (story points complete in the WP) / (current best estimate of total story points in the WP) / See Diagram 1. Feature ACP %. This can also be the burnup metric for all the stories associated to the | Story Points, Definition of Done, Burnup metrics, Story |

WBS/IMS Subgroup Members

- **AnnMarie Oien – Subgroup Lead**
- **Juana Collymore**
- **Heidi Crookston**
- **Greg Davis**
- **Rob Eisenberg**
- **Renee Frazier**
- **Dennis Hall**
- **Melissa Slaughter**
- **Jim Taylor**
- **Brian Valenti**
- **Robin Yeman**

WBS/IMS Status

- **Objective:** To define industry best practices around work breakdown structure establishment and maintenance that incorporates both EVM and Agile practices.
- **Achieved:** Completed 25 page document July 14th 2015
- **Release plan near term:** Anticipate broader release to PARCA/Government and NDIA IPMD communities shortly
- **Management longer term:** Will become part of the NDIA IPMD Agile/Earned Value Guide.

Earned Value Management for Agile Programs: Industry Best Practices

Guidance on Agile implementation on EVMS-applicable programs drawing from lessons learned and best practices

Authored by members of the National Defense Industry Association Integrated Program Management Division (NDIA IPMD) Agile EVM Working Group

Revision Date: 14th July 2015

Contents

| | |
|---|----|
| Earned Value Management for Agile Programs: Industry Best Practices | 1 |
| Introduction: EVM for Agile Programs | 3 |
| Agile Project Planning | 3 |
| Agile EVM Performance Measurement Baseline | 7 |
| The Work Breakdown Structure | 7 |
| IMP (Integrated Master Plan) | 10 |
| IMS (Integrated Master Schedule) | 10 |
| Structures for Performance Measurement | 14 |
| Control Account Plan | 14 |
| Aligning Agile Progress Metrics with Earned Value Reporting Levels | 15 |
| Computing & Reporting Earned Value Performance | 16 |
| Feature Cost/Risk to be considered when establishing baseline | 17 |
| When do you take credit for a story? | 17 |
| Variance from the Baseline: Examples with Agile EVM | 19 |
| How to use Agile metrics to forecast ETC/EAC? | 19 |
| Managing Baseline Change on Agile Programs | 20 |
| References | 21 |
| Appendix A: EVM and Agile Data Dictionary | 22 |
| Appendix B: Examples of Agile EVM Progress Tracking Charts | 48 |

- **Howard Leibowitz – Subgroup Lead**
- **Ivan Bembers**
- **Kimberly Davis**
- **Singi DeSilva**
- **Amy Martz**
- **Jessica Kaspari**
- **Andrea Nibert**
- **Barbara Phillips**
- **Ron Terbush**
- **Pam Walter**

Managing Change Status

- **Objective:** Best Practice paper recommendations formulated on managing baseline changes for Agile Software Development programs that have Earned Value Management requirements.
- **Achieved:** Completed document August 17
- **Release plan near term:** Anticipate broader release to PARCA/Government and NDIA IPMD communities shortly
- **Management longer term:** Will become part of the NDIA IPMD Agile/Earned Value Guide.

Questions???