NDIA Integrated Program Management Division

30-31 August 2016

Dan Lynch
Chairman, NDIA-IPMD

Agenda

- **Board Member Updates / Election**

- **April Survey Results**

- **IPMD Update / Activities**

- **Working Groups**

- **2017 Meeting Schedule**

Vice Chair:
Dale Gillam

Chair:
Dan Lynch

Officers at Large

Past Chairs

Neil Albert

Steve Barnoske

Kathy Dailey

John Duval

Buddy Everage

Dan Butler

Gary Humphreys

Mary Ann Hale

Kim Herrington

Yancy Qualls

Randy Steeno

Joan Ugljesa

Joe Kusick

Pete Wynne

Business Sensitive

- **Election: TODAY!**

- **Officer At Large**

  - **Nominees vetted / Approved by Board 7/12/16**

    - **Dan Bellovary**   **Rolls Royce**
    - **Vaughn Schlegel**   **Lockheed Martin**

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Sector
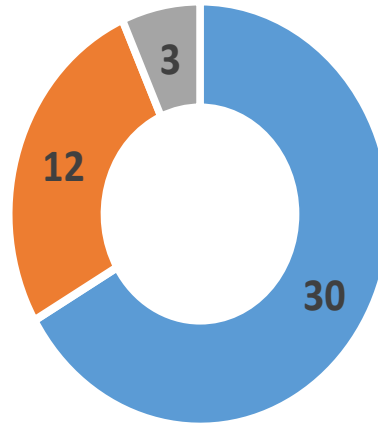
INDUSTRY   GOVERNMENT   OTHER

Role
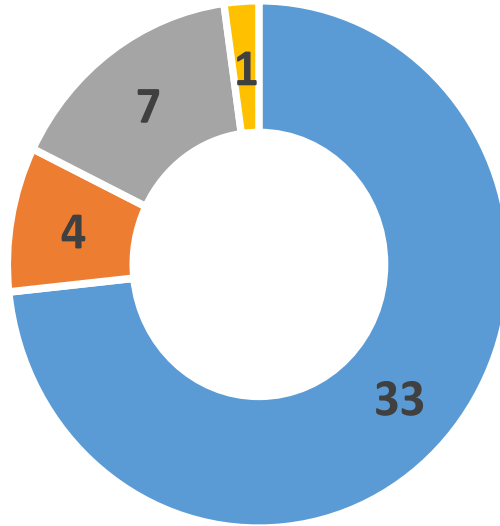
April Survey Results

Cost of Event
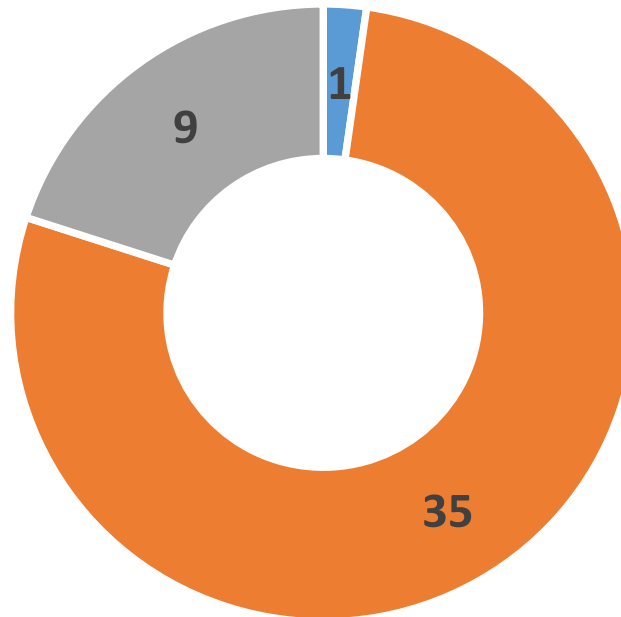
- TOO HIGH
- ABOUT RIGHT
- NO OPINION

April Survey Results

Day One Topics

Topic	Rating
DATA DRIVEN PILOT	4.6
AGILE GUIDE SUMMARY	3.9
PARCA OPENING	4.3
PARCA OUTBRIEF	4.3
CLEARINGHOUSE	4.5
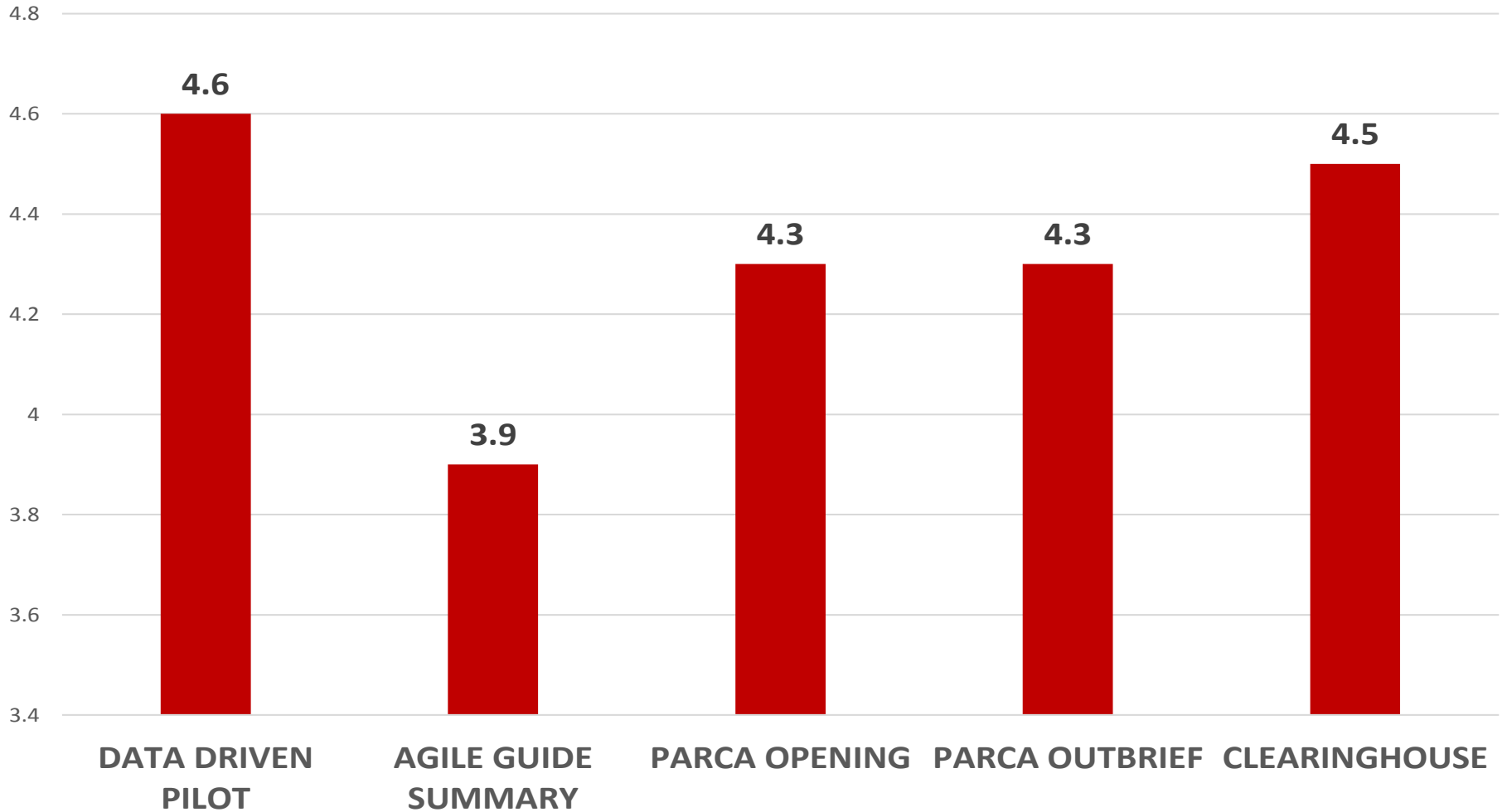
- **Additional Items**

  1) Would you recommend this event   **YES**

  2) Will you attend future events?   **YES**

  3) Does location matter?   **NO**

  4) Registration process effective/easy? **YES**

  5) NDIA-IPMD Website useful?   **YES**

IPMD Update / Activities

- **Supported EVM World Naples, FL June 1-3**
- **Supporting IPM Workshop Bethesda, MD Oct 31 – Nov 2**
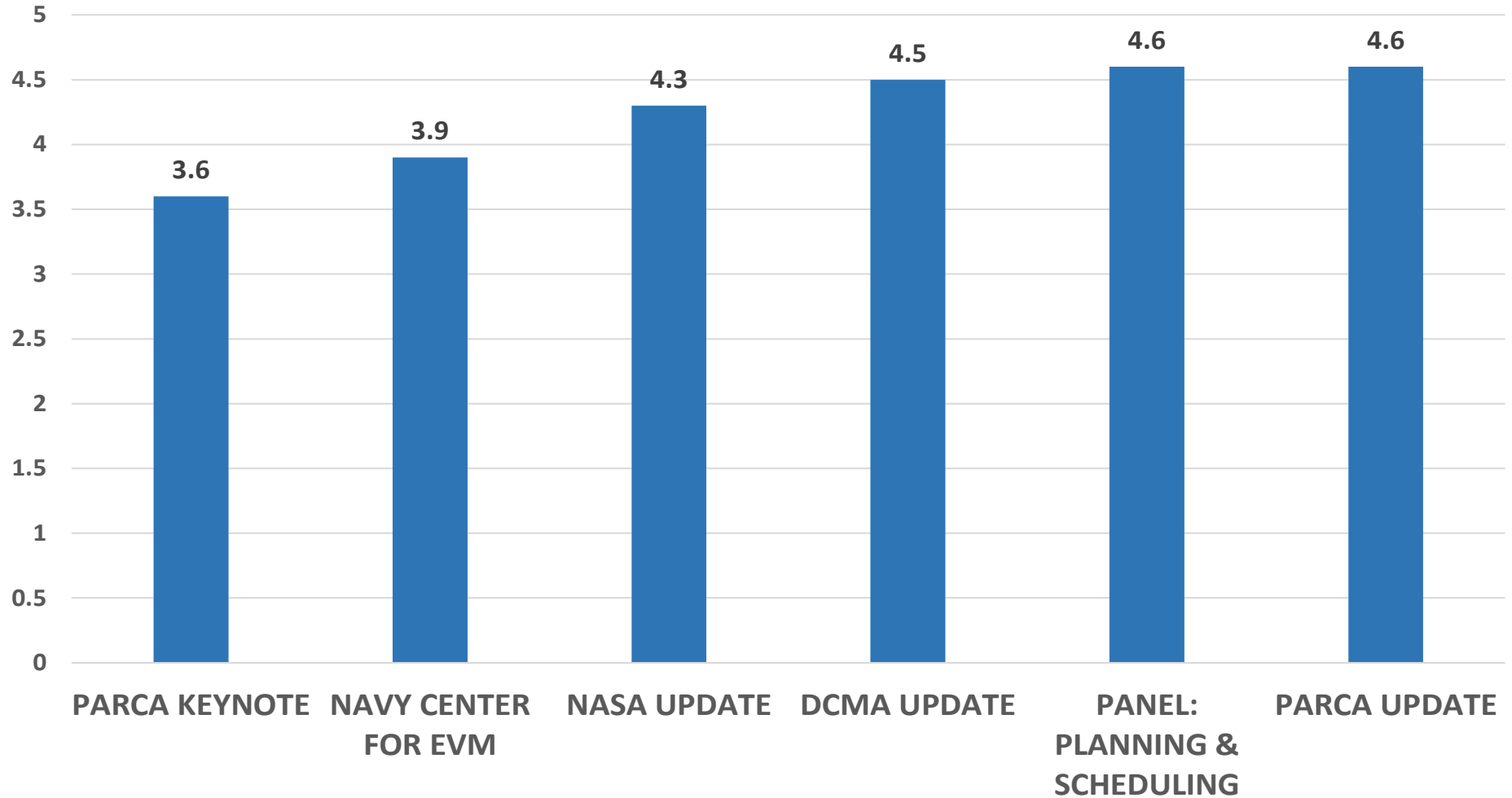- **April Survey results**
- **Joint Government – IPMD Discussions on Future Reporting**
  - Broader application of expanded Format 7
    - Potential to eliminate Formats1-4 XML <u>and</u> be utilized for DCMA Data Driven Surveillance

- **SASC NDAA bill mark up**
  - CAPE Initiative (discussed later)
  - "Waiver of Business Systems Clause for high tech commercial entities
  - Raising Compliance/Surveillance threshold to >$200M
    - NDIA IPMD letters to solicit support from NDIA President to push back sent on 6/13/16 and 6/24/16 (AIA using language; hand delivered to Kendall via Bliss)

- **IPMD Strategy Session**
  - **Conducted Joint Session with PARCA & DCMA July 13 / August 29**
  - **Next scheduled for 2-3 November in DC area (after IPM Workshop Bethesda)**

Shameless Plug

IPM Workshop Bethesda, MD Oct 31 – Nov 2
Keynote Speakers

Miles Shepherd
In a 35 year career in project management, Miles has led a variety of projects in UK, Eastern Europe and Russia, mainly implanting IT systems and managing organisational change. His later work centred on the develop of project management processes used to decommission nuclear reactors in Slovenia, UK, Ukraine and USA. Miles works with Government agencies, universities, the media and professional societies (Association for Project Management, International Project Management Association and PMI) to improve understanding of project management. He led the development of ISO 21500 and chairs ISO TC 258 responsible for project, portfolio and program management standards

Bill Craig
Bill Craig holds a Ph.D. in astrophysics from U.C. Berkeley. He has over 25 years of experience in building astrophysical instrumentation in the university and national laboratories and has worked on numerous NASA missions including NuSTAR, currently in orbit, where he served as payload manager and the Ionospheric Connections Explorer (ICON) mission, to be launched in 2017, where he is project manager.

IPMD Update / Activities

- **IPMD Board Strategy Session July 12-13**

  - **Agenda / Discussion Points**
    - **April Survey Results (upcoming)**
    - **Communications**
    - **Technical Survey (in process)**
    - **IPMD POCs for Partners/Agencies (completed)**
    - **2017 Meeting Outline**
      - **Jan – Northrop Grumman, VA (confirmed)**
      - **Apr – Deltek, DC (confirmed)**
      - **Aug – Textron, DC (confirmed)**
    - **PARCA/DCMA Interface**
      - **New Format 7 potential**

Working Group Overview

- **EVMS for Agile Development**

- **Civilian Agency Industry Working Group (CAIWG)**

- **Program Management**

- **Clearinghouse**

- **Guides Steering Group**

- **Planning & Scheduling**

- **Prime and Subcontract Management**

- **Services & Sustainment**

- **Contracts**

- **CSDR**

Participants Welcome!!

EVMS for Agile Development

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

Kathy Dailey
Kathy.Dailey@GDIT.com

AnnMarie Oien

- **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**

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/

Leadership

Jerry Jones
jerry.jones@faa.gov

Neil Albert
nalbert@mcri.com

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**

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PM Working Group

Overview/Mission
Broaden the focus and membership of the IPMD to influence acquisition policy and share best practices among program management professionals.

Leadership

Vaughn Schlegel   **Gerry Becker**
Vaugh.m.schlegel@lmco.com

Objectives:
- Recommend the formation of additional IPMD working groups to address a range of topics essential to successful program execution
- Increase program manager participation in IPMD by broadening meeting topics appropriately
- Develop program management guides/white papers as appropriate
- Provide advocacy for risk/opportunity management issues
- Develop joint DoD Program Management best practices handbook

Clearinghouse Working Group

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

Joe Kusick
Joe_Kusick@Raytheon.com

Gary Humphreys
ghconsult@aol.com

- **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

IPMD Guides Steering Group

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

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)**

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Guide	Update Lead	Status
Intent	Mike Cuticchia, Jeff Poulson	Reaffirmation Version C update published April 2014 – *up for review in 2017*
IBR	Neil Albert	Revision 2 published March 2015
Surveillance	Dale Gillam	Revision 2 published July 2015
Application	Guides Steering Group	Revision 2 published January 2015
Acceptance	Buddy Everage	Revision 1 published March 2013 Revision 2 update being presented at August 2016 meeting, electronic ballot to approve
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016 Version 3 update: vote at April 2016 meeting
Predictive Measures	Program Management Working Group	First edition published September 2014 – up for review in 2017
Agile and EVM	Agile Working Group	Revision 1 published in April 2016 There will be regular updates to this guide
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 presented at August 2016 meeting, electronic ballot to approve

Planning & Scheduling Working Group

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**
  - http://www.ndia.org/Divisions/Divisions/IPMD/Documents/PASEG/
- **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

Caroline Cremisi
Caroline_M_Cremisi@raytheon.com

Open

- **<u>Output</u>** - 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.

Services & Sustainment Working Group

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.

Leadership

John Duval
jduval1@CSRA.com

Open

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

CSDR Working Group

Overview

Focus is to establish communication between CAPE and NDIA IPMD practitioners, with emphasis on the pending changes to the Cost Reporting DIDs.

Leadership

Randy Steeno
randall.r.steeno@boeing.com

Jim Taylor
James_Taylor@Raytheon.com

- **Establish a Formal Channel of communication between NDIA-IPMD and CAPE/DCARC**
  - Keep NDIA IPMD current on the changing environment and reporting requirements from CAPE
  - Provide industry comments on draft DIDs from CAPE
  - Consider Collaboration Meetings
- **Assess the need for any additional IPMD documents regarding CSDRs**
  - Will investigate / look at what educational materials may be needed for IPMD members to assist them in complying with the new Flexfile requirements
- **Team will monitor the new PARCA/CAPE Co-Plan pilot initiative.**

Contracts Working Group

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, on interpretation of requirements as it relates to Contractual Application of EVMS

Leadership

Lisa Wolf, MBA, PMP, EVP
wolf_lisa@bah.com

Jean Lohier, CPCM, CFCM
jean.lohier@att.com

- **Goals:**
  - **Establish a Formal Channel of communication and collaboration between NDIA-IPMD and the National Contract Management Association (NCMA)**
    - **Quarterly / Semi-Annual Meeting**
    - **Discussion of Learning Opportunities**
    - **Collaboration Meetings**
  - **Develop a set of collaboratively produced educational materials and provide training at various venues**
- **Unique Construct:**
  - **Partnering with 'outside' experts in this domain (aka NCMA) to obtain balanced view**

IPMD Communications Initiative

- **Board initiative underway to improve communications across internal and external stakeholders**
- **Example activities within the Board – Telecom meeting every two weeks**
  - Identify specific initiatives with leads and objectives, report out progress
  - Detailed agenda distributed in advance of meetings to structure conversations; capture the notes and actions in the same file
  - Hold periodic in-person strategic planning meetings
  - Inventoried the IPMD Working Group SharePoint sites, cleaned up content, updated user material and distributed to Working Group leads
  - Maintain IPMD web site with assistance from NDIA
- **Working Groups and Membership**
  - Push frequent emails out to membership with info for meetings or volunteer needs
  - Collection and analysis of meeting feedback by Board
  - Rotating Working Groups present updates at the Board meetings
    - ✓ Intent is to keep the Working Groups results oriented and operating consistently, provide help when needed
  - Tie the Working Groups to sessions and tracks at EVM World and the IPM Workshop

IPMD Communications Initiative

- **NDIA leadership and external stakeholders**
  - PARCA and DCMA participate in sessions at the strategic planning meetings
  - Provide point papers to NDIA leadership
  - Submit common industry or other issues to the PARCA EVM Interpretation and Issue Resolution web site
    - ✓ Examples: recommendations for updates to the EVMSIG, IPMR DID, IPMR Implementation Guide
  - Submit articles on IPMD initiatives and Working Groups to CPM's *The Measurable News* and NDIA's *National Defense Magazine*
  - Work closely with CPM to have strong IPMD presence at the IPM Workshop

- **Established points of contact for partners and agencies**

CPM – Lynch	MDA – Lynch	DOE / EFCOG – Everage Navy - Albert
FAA – Everage	Air Force – Albert	DHS - ??
Army – Albert	NASA – Steeno	DAU - Albert
PARCA – Lynch	DCMA – Humphreys/Hale	IC / JSCC – Kusick
NDIA Sys Eng – Dailey	NCMA - Gillam	

Meeting Schedule

- ## NDIA IPMD Upcoming Events
  - ### 2017 (Proposed Dates)
    - Feb 1-2 (Wed - Thur) *(NGC; Fairfax)*
    - Apr 25 - 26 (Tue - Wed) *(Deltek; Crystal City)*
    - Aug 30 - 31 (Wed – Thur) *(Textron; Crystal City)*

  - ### 2018 Sponsor(s) needed
    - See any member of the Board
    - Stressing Spring & Fall in DC Beltway
      - Winter in warm climate (please?)

Award Program

Name of Award	*"NDIA IPMD Distinguished Service Award"*
Criteria	**Significant contributions to IPMD**
Eligibility	**NDIA member**
Recipient	**Individual, possible small group**
Nominations	**via NDIA IPMD BoD**
Approval	**2/3 vote from BoD**
Frequency	**as appropriate**

Award Program coordinators   John Duval & Dan Butler