

NDIA Integrated Program Management Division

*Spring Meeting
April 26 - 27, 2017
Northrop Grumman
Fair Oaks, VA*

*Dan Lynch
Chairman, NDIA-IPMD*

www.ndia.org/divisions/IPMD

Unrestricted Content

Reaffirming what we do and remembering those we do it for



U.S. AIR FORCE

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Agenda

- **Board Members**
- **Purpose**
- **Activities/Meetings**
- **Working Groups**

IPMD Board Members



Vice Chair: Dale Gillam



Chair: Dan Lynch

Officers at Large



**Neil
Albert**



**Steve
Barnoske**



**Dan
Bellovary**



**Kathy
Dailey**



**John
Duval**



**Buddy
Everage**



**Mary Ann
Hale**



**Yancy
Qualls**



**Randy
Steen**



**Joan
Ugljesa**

Past Chairs



**Dan
Butler**



**Gary
Humphreys**



Joe Kusick



Pete Wynne

IPM Division (IPMD) Purpose

***Lead the Advancement of Integrated
Program Management Through
Industry and Government Partnership***

Strategic Themes

Thought Leadership in IPM

Collaboration

Strategic Objectives

Create and Maintain Standards and Guides

Conduct Forums and Meetings to Advance IPM Practices

Provide and Publish Industry Perspective on IPM Topics

Develop a Pipeline of Future IPM Leaders

Develop and Maintain Communications Plan for Key Stakeholders

Engage and Participate with Government and Industry Executive Leadership

Engage and Participate in Other Industry Groups that Foster the Advancement of IPM

Engage and Participate with Academia and Other Educational Entities

Strategic Themes

Thought Leadership in IPM

Collaboration

Create and Maintain Standards and Guides

Develop and Maintain Communications Plan for Key Stakeholders

Update / Complete PM Guide

IPMD BoD to Establish Team and CONOPS

Provide Comments to EVMSIG

Provide Comments to EIA-748

Engage and Participate with Government and Industry Executive Leadership

Refresh Predictive Measures Guide

Finalize Prime/Subcontract Guides

Establish Executive Level CAPE Awareness

Consult / Assist in IPMR Update

Update / Publish Agile Guide (rev 1.1)

Tactical 2017 Objectives

• 2017

- Jan 31–Feb 1, 2017 Orlando, FL (Deltek)
- *Mar 7–8, 2017 San Diego, CA (Raytheon – Strategy Session)*
- Apr 26-27, 2017 Fair Oaks, VA (Northrop Grumman-no Day 3)
- *May 31-Jun 2, 2017 EVM World (New Orleans, LA)*
- *Aug 7-8, 2017 TBD (Strategy Follow-Up)*
- Sep 12-13, 2017 San Diego, CA (Artemis-Day 3 TBD)

• 2018

- Late Jan–Early Feb, 2018 Orlando, FL (Sponsor Needed)
- Spring 2018 Ft. Worth, TX (Bell/Textron)
- Aug-Sep 2018 TBD (Sponsor Needed)

• Participation Statistics

<u>Time</u>	<u>Location</u>	<u>Industry</u>	<u>Govt</u>	<u>Total</u>
• Winter 2016	Orlando	114	22	136
• Spring 2016	Pennsylvania	91	21	112
• Summer 2016	Connecticut	121	32	153
• Winter 2017	Orlando	<u>127</u>	<u>34</u>	<u>161</u>
	• Averages	113	27	140

IPMD Board Strategy Session March 7-8

• Agenda / Discussion Points – Highlights

- | | |
|---|-------------------|
| • Redefine Purpose/Strategic Objectives | Complete |
| • Review/Update Charter | In Process |
| • Create Meeting Requirements Checklist | Complete |
| • Establish Communications WG/Lead | In Process |
| • Perform survey at April Meeting | Complete |
| • Determine Path Forward for EVMSIG Response | Complete |
| • Board Membership Discussion | In Process |
| • Board position opening for September ballot | |
| • Candidate nomination period commenced | |
| • Board to vet candidates at Aug strategy session | |

Working Group Overview

- **Program Management** (*Schlegel / Becker*)
- **Agile and EVM** (*Dailey / TBD*)
- **Planning and Scheduling** (*Qualls / Gilhuys*)
- **Contracts** (*Wolf / Lohair*)
- **Prime/Subcontract Management** (*McNanley / TBD*)
- **Benchmarking** (*Duval / Everage*)
- **CAIWG** (*Albert / Jones*)
- **CSDR** (*Steenno / Albert*)
- **Data Exchange** (*Ugljesa*)
- **Clearinghouse** (*Humphreys / Kusick*)
- **Guides Steering Group** (*Ugljesa / Butler / Steeno / Hale*)
- **Newcomers** (*Lynch / Gillam*)

Participants Welcome!!

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
Vaugh.m.schlegel@lmco.com



Gerry Becker
Gerry.Becker@harris.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**

Agile and EVM Working Group - Charter

Overview/Mission:

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 ("AMO")
Annmarie.oien@lmco.com

Objectives:

- 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, Strategic Backlog and Contracting for Agile and EVM
- Guide describing the application of EVMS in an Agile development environment in subgroup areas
- Coordinate activities with other industry groups
- Guidance will be released in interest areas as available

Planning and Scheduling Working Group - Charter

Overview/Mission:

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

Objectives:

- 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

Contracts Working Group – Charter

Overview/Mission:

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

Objectives:

- **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

Prime/Sub Contract Management Working Group - Charter

Overview/Mission:

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:



Amanda McNanley
amanda.mcnanley@rolls-royce.com

Objectives:

- **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/Mission:

Establish a new benchmark(s) for correlating cost drivers and best efforts of maintaining an EVMS for programs and projects of various complexity.

Leadership:



John Duval

John.Duval@CSRA.com



Buddy Everage

beverage@hbiconsultingsolutions.com

Objectives:

- Conduct surveys of industry contractors to discover the should cost for EVMS maintenance for mature EVMS implementations
- Focus on outputs that will be beneficial to government and industry allowing both to better understand the financial impact that may lead to more successful and realistic negotiations for the cost of maintaining an EVMS

Civilian Agency Industry Working Group (CAIWG) - Charter

Overview/Mission:

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

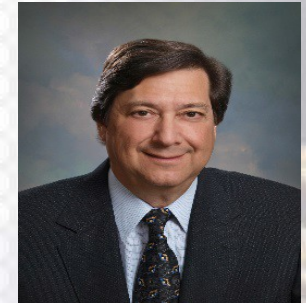
Overview/Mission:

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

Leadership:



Randy Steeno
randall.r.steen0@boeing.com



Neil Albert
nalbert@nfaconsulting.com

Objectives:

- Establish a Formal Channel of communication between NDIA-IPMD and CADE/DCARC Focus Group
 - 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 CADE Cost & Technical Data reporting
 - Will investigate / look at what educational materials may be needed for IPMD members to assist them in complying with the new Flexfile & Technical Data requirements
- Team will monitor the new PARCA/CAPE Co-Plan pilot initiative.

IPMR DID Data Exchange Working Group - Charter

Overview

Short term effort to facilitate PARCA and DCMA transition to a *DoD owned data exchange format* for next revision of the IPMR DID (EVM-CR) as well as DCMA compliance/surveillance activities

Leadership

Industry

Joan Ugljesa (NVG), Keith Fisher (Raytheon), Mark Jamieson (GD-MS), “CJ” Cherilyn Jones (LM)

DoD

EVM-CR, PARCA, Navy:
John McGahan, Alex Walter, Melissa Gudger, Beau Willis

- **Intent is to conclude work effort as quickly as possible (spring/summer 2017) to facilitate the next revision of the IPMR DID**
 - Revision focuses on the schedule and cost performance data requirements instead of describing the content of paper based forms
- **Migrate from the UN/CEFACT XML Schema and data exchange instructions (DEIs) to a simpler data interchange format (JSON) and business rule DEIs**
 - JSON structures are based on arrays and records – intended for the purpose of exchanging data
 - Collection of data tables to convey schedule and cost performance data in a software neutral format
 - Reflect lessons learned from ANSI X12 and UN/CEFACT XML standards development processes

Clearinghouse Working Group Charter

Overview/Mission:

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

Objectives:

- Maintain repository of EVMS issues and Interpretative guidance
- Clearinghouse Charter, Process, and Submission Forms Located on the IPMD website

Note:

- ***Russ Rodewald will participate as Government liaison!!***

IPMD Guides Steering Group – Charter

Overview

Maintain the set of IPMD Guides to reflect the latest changes in the EVMS Standard (EIA-748), related government 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

Mary Ann Hale
MaryAnn.Hale@gd-ms.com

Randy Steeno
randall.r.steen@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)**

Guide	Update Lead	Status
Intent	Guides Steering Group	Reaffirmation Version C update published April 2014 – <i>up for review in 2017</i> <i>Begin EVMS Standard reaffirmation process</i>
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 2 published September 2016
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016
Predictive Measures	Program Management Working Group	First edition published September 2014 – <i>Up for review in 2017</i>
Agile and EVM	Agile Working Group	Revision 1 published in April 2016 <i>Revision 1.1 – on schedule for vote to approve at April 2017 IPMD meeting</i>
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 published November 2016

Context on the Review and Approval of IPMD Guides and Major Initiatives

- **Per the IPMD Charter:**
 - All IPMD guides and major initiatives are to be approved by the Board and subsequently provided to the membership for review at least 30 days prior to when the document or initiative is scheduled for vote
- **The IPMD has a specific process that is followed for the review and approval of guides and major initiatives**
 - This process or a subset of this process may also be used for other publications (e.g., White Papers, non-guide products from Working Group) at the recommendation of the Guides Steering Group to the Chair/ Vice-Chair
- **The Vice-Chair maintains the IPMD distribution lists segregating between general membership, voting members, and the Board of Directors (BOD)**

Overview/Mission:

To welcome and introduce first time attendees to the IPMD during a pre-meeting evening social event to enhance their engagement during the Working Group breakout sessions and have a discussion on IPMD activities and initiatives

Leadership:



Dan Lynch

Daniel_L_Lynch@Raytheon.com



Dale Gillam

Dale.E.Gillam@saic.com

Objectives:

- To provide a forum for newcomers or people who have not participated in the IPMD in a while to discuss IPMD activities and initiatives
- To discuss specific actions the IPMD can take to better engage newcomers and have them return
- To collect fresh perspectives from newcomers on the IPMD experience and how things can be improved to better support the IPMD mission and objectives

IPMD Award Program

Name of Award	<i>“NDIA IPMD Distinguished Service Award”</i>
Criteria Eligibility	Significant contributions to IPMD NDIA member
Recipient Nominations Approval	Individual, possible small group via NDIA IPMD BoD 2/3 vote from BoD
Frequency	As appropriate
Award Program Coordinators	John Duval & Dan Butler

Award Program Honorees

Name

Kathy Dailey

Date

Aug 2016

Recognition

Leadership / Agile and EVM WG