

**Reaffirming what we do and
Remembering those we do it for**

NDIA



- **IPMD Board**
 - **What we do well**
 - **What we need to improve**
 - **Where we need help**
- **A moment of reflection**
- **Purpose, Objectives, and Events**
- **Working Groups**
- **Distinguished Service Award**

IPMD Board Members

NDIA

Past Chairs



Vice Chair:
TBD



Chair:
Dale Gillam



Dan Lynch

Officers at Large



Gary
Humphreys



Tracie
Thompson



Joan
Ugljesa



Randy
Steen



Tej
Sujlana



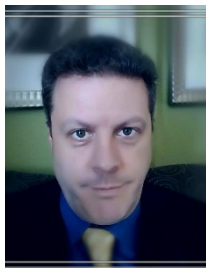
Dan
Bellovary



Yancy
Qualls



Cherilyn
Jones



Scott
LaFrance



Lisa
Hastings



Gary
Troop



John
Duval



Neil
Albert

Context on How the Board Operates – What We Do Well



- **Meet in person before and after these meetings**
- **Meet for 90 minutes every other week**
- **Some Board members lead/co-lead Working Groups or initiatives (e.g., guide updates or special projects).**
- **Serve as liaisons to Working Groups**
- **Invest time responding to emails and calls from the community**
- **Invest time building relationships with government and industry stakeholders**
- **Invest time building relationships with other orgs**

Context on How the Board Operates – What We Need to Improve



- **Board participation and engagement**
 - Identifying creative ways to backfill exodus of past chairs – down three
 - Getting better at peer accountability for engagement
 - Revamping bi-weekly call structure to focus on performance
- **Build the pipeline of leaders**
 - Expanding Board opportunities and including WG leaders
- **Focus more time on our Working Groups**
 - We have two WG sessions for the first time with more time dedicated
- **Engage WG leaders in our Board discussions**
 - From this moment forward, all WG leaders are invited to our regular Board meetings and calls
- **Collaboration with orgs to expand to IPM**
 - Succeeding with NDIA help
- **Targeted visits with focused message to gov't execs**
 - Levering help of recent Past Chair and PM WG lead to execute

Board – Where We Need Help

- **Voting to be held today**
- **Two Officer at Large Positions. Candidates:**
 - Shane Olsen
 - Russ Rodewald
- **Vice Chair. Candidate:**
 - Vaughn Schlegel
- **Notes:**
 - It has been 1,031 days of us seeking the IPMD a Vice Chair candidate for me (serving 281 days without a Vice Chair)
 - Down three engaged past Chairs very quickly
 - Inherited a legacy of an unnecessarily low limit on Board members – result is good people turned away & discouraged
 - Some Board members aren't “in the right place, at the right time” – having candid discussions with them

***A Moment of Reflection on Recent Past
Industry Leaders in our Community***

“Transition” of Leadership in 2018 – We Thank You!

NDIA



Glenn Fujimoto



Dan Butler



Pete Wynne



Lisa Hoffman



Kathy Dailey



Gerry Becker



Buddy Everage



Mary Ann Hale



Carla Gilhuys



Bill Bridenbaugh



Jerry Jones



John Wilkinson



Jean Lohier

IPM Division (IPMD) Purpose

NDIA

IPM Division (IPMD)
Purpose

NDIA

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

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



Thought Leadership in IPM

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

Collaboration

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

Recent: IPMD Events/ Supported Events



- **IPMD: 2/7-8, 2018, Orlando, FL (Deltek)**
- **IPMD: 5/2-3, 2018, Dulles, VA (Artemis)**
- **EVM World: 5/30 – 6/1, 2018. Ft. Lauderdale, FL**
- **IPMD: 8/28-29, 2018 Ft. Worth (Bell Helicopter)**
- **Program Management Track at NDIA-System Engineering Division Conference, 10/22-25, 2018 (Tampa, FL)**
- **IPMW: 11/13-14, 2018, Washington, DC**
- **IPMD: 2/6-7, 2019, Melbourne, FL (Harris/Deltek)**

Upcoming: IPMD Events/ Supported Events



- **IPMD: 4/30-5/1, 2019, Reston, VA (Encore Analytics)**
- **EVM World: 5/22-24, 2019, Ft. Lauderdale, FL**
- **IPMD: 9/11-12, 2019, Denver, CO (*Sponsor?*)**
- **Program Management Track at NDIA-System Engineering Division Conference, 10/21-24, 2019, Tampa, FL**
- **IPMD: Winter 2020, FL? (*Sponsor?*)**
- **IPMD: Spring 2020, DC? (*Sponsor?*)**
- **IPMD: Combined event with NDIA SE Division, Location TBD, Fall 2020**

IPMD Board Meeting – Discussion Points

– Tuesday, February 5th



- **DFARS**
- **IPMR2**
- **EIA - 748E**
- **EVMSIG**
- **EVMIG**
- **DCMA CRC**
- **DCMA Test Metric CCB (BP-7)**
- **DOE / EFCOG – Study and Engagement**
- **PMI EVM Practice Standard**
- **OTB/OTS Guide**
- **809 Panel Report recommendations**

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

Randy Steeno

randall.r.steenno@boeing.com

Tracie Thompson

Tracie.Thompson@honeywell.com

Joan Ugljesa

jugljesa@newvistasgroup.com

- **Mandatory three year review cycle for all guides – working groups may update guides more frequently**
- **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)**

February 2019 Guide Status and Updates



Guide	Update Lead	Status
Intent	EIA-748 Reaffirmation Working Group, Guides Steering Group	Reaffirmation Version D now available EIA-748 D update published August 2018
IBR	“CJ” Jones	Revision 2 published March 2015 Update in process, vote for approval April 2019
Surveillance	Dan Bellovary	Revision 3 published November 2018
Application	Guides Steering Group	Revision 3 published May 2018
Acceptance	Buddy Everage	Revision 2 published September 2016 Due for update in 2019
PASEG	Planning and Scheduling Working Group	Version 3.0 published April 2016 Version 4.0 update in process, vote for approval Sept 2019
Predictive Measures	PM Working Group	Revision 2 published September 2017
Agile and EVM	Agile Working Group	Revision 1.2 published May 2018 Next revision in process, vote for approval April 2019
Scalability Guide	CAIWG, Neil Albert, Guides Steering Group	Revision 1 published November 2016 Due for update in 2019
Guides Master Definitions List	Guides Steering Group	December 2018 Revision posted on NDIA web site – updated regularly

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

- **Per the IPMD Charter:**
 - All IPMD guides and major initiatives (e.g. Charter) 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)**

Agile and EVM WG

Overview/Mission:

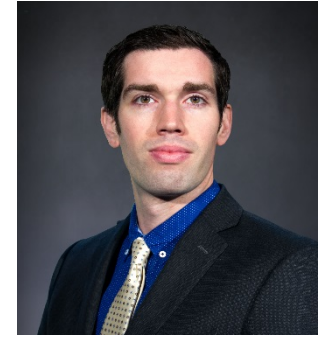
Focus on the application of EVM in an Agile development environment. The group works to advance the understanding and use of Agile and EV to increase the probability of program cost, schedule, and technical success.

Leadership:



Ron Terbush

Ronald.j.terbush@lmco.com



Matt Strain

Matthew.Strain@caci.com

Objectives:

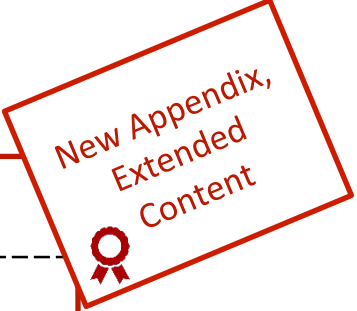
- Forum to exchange information and provide guidance for projects that use Agile development methodology and EVM
- **Current Publication:** “An Industry Practice Guide for Agile on Earned Value Management Programs” Version 1.2 - Created to address challenges to EVM on programs implementing agile development techniques
- **Next Guidebook Update (Version 1.3) – Current Status: Receiving membership comments on Guide 1.3 Draft (due back 2/21).**
 - New Section 5.6: Systems Engineering Reviews
 - New Appendix F: RFP language
 - New Appendix G: Agile Metrics

Agile and EVM WG

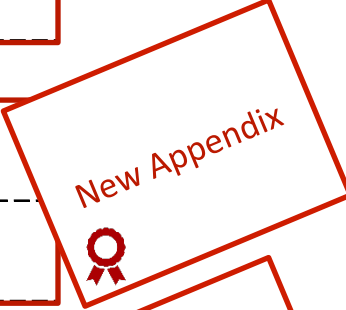


Sub-Working Groups (Guide v1.3 only):

Contracting	Identify and define the characteristics associated with Contracting within an agile environment.
Jim Duffy, Gordon Kranz, Andrea Nibert, Naomi Silver, Clareice Chaney, Renee Frazier	



Metrics	Application of common agile metrics for EVMS and program control considerations such as Forecasting/Baseline/VAR.
Dr. Daniela Silitra, Nathan Oligmueller, Elizabeth Schaapveld, Justin Rogers, Kim Beckman, Andrew Rymaruk	



Training	Conversion of guide content into actionable presenter and student training materials for community trainers. Support for training events.
Amy Martz, Andrea Nibert, Jim Duffy, Bruce Jordan, Amber Young, Robin Pulverenti, Andrea Nibert	



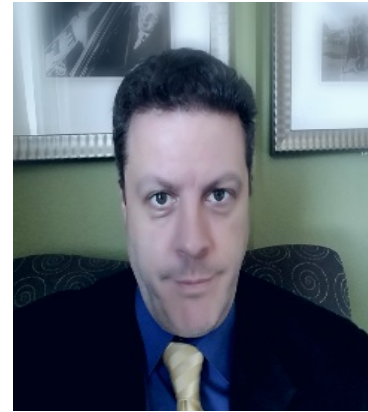
Strategic Backlog and General Content	Coordination of conceptual roadmaps for Guide version releases, as well as general content and support.
Gordon Kranz, Ron Terbush, Matt Strain, Robin Pulverenti, Renee Frazier, Audrey Mahoney	

Planning & Scheduling WG

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:



Scott LaFrance
Scott.Lafrance@baesystems.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

Overview/Mission:

Focused on aligning the Contract Management and Integrated Program Management (IPM) Practitioners, with an emphasis on EVM and project scheduling practices, and interpretation of requirements as it relates to Contractual Application of EVMS

Leadership:



Elizabeth Schloer
Schloer_Elizabeth@bah.com

Allie Stanzione
Allie.Stanzione@gd-ms.com

Objectives:

- Establish a Formal Channel of communication and collaboration between NDIA-IPMD and the National Contract Management Association (NCMA)
- Create a guide for the project management and contracts communities, “Contracting with EVM Requirements.” The guide will align the Government and Industry roles and responsibilities with the phases from the PMBOK and CMBOK.

We are in need of sub-leads for the following areas:

- Roles and Responsibilities
- Pre-Award and Project Start-up
- Execution and Closeout
- Terms and Definitions
- Frequently Asked Questions

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:



Vicki Frahm
vlfrahm@sandia.gov



Carla Sives
Carla.Sives@baesystems.com

Objectives:

- **Output** - Based on the inputs provided by both the industry and government, the working group has prepared a collaboration framework which addresses:
 - Teaming, Proposal, and Negotiation Considerations
 - Post-Award and Start of Work Planning
 - Risk and Opportunity Management and Integration
 - Program Execution
 - Integrated Baseline Review (IBR) Conduct
 - Surveillance
 - Close-out
- The Framework will have a final review by the WG this week before it goes to the Board for final comments.

2/16/19

Overview/Mission:

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

Leadership:



Randy Steeno
randall.r.steen@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 CADE when feasible
- Assess the need for any additional IPMD documents regarding CADE Cost, Software & Technical Data reporting
- Will encourage the IPMD members to review and develop processes to comply with the new Flexfile & Technical Data requirements
- Team will monitor the new PARCA/CAPE Co-Plan initiative.

Clearinghouse WG

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:



Gary Humphreys
ghconsult@aol.com



Russell Rodewald
Russell.W.Rodewald@Raytheon.com

Objectives:

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

Program Management WG



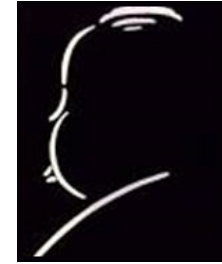
Overview/Mission:

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

Leadership:



Vaughn Schlegel
vaughn.m.schlegel@lmco.com



TBD

Objectives:

- Recommend 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
- Team with NDIA Systems Engineering to Advance Common

Validating PMWG Mission and Objectives

Thanks to Lisa Hoffman for Her Leadership in Recent Years!

22nd Annual Systems & Mission Engineering Conference

NDIA



October 21-24, 2019
Hilton Downtown
Tampa, Florida



ONCE AGAIN FEATURING

Program Management Track

Led by NDIA IPMD

Contact Vaughn Schlegel for details

Overview/Mission:

Civilian Agency/Industry Working Group (CAIWG) provides a forum for the open exchange of Government and Industry views on performance-based management systems, including EVM

Leadership:

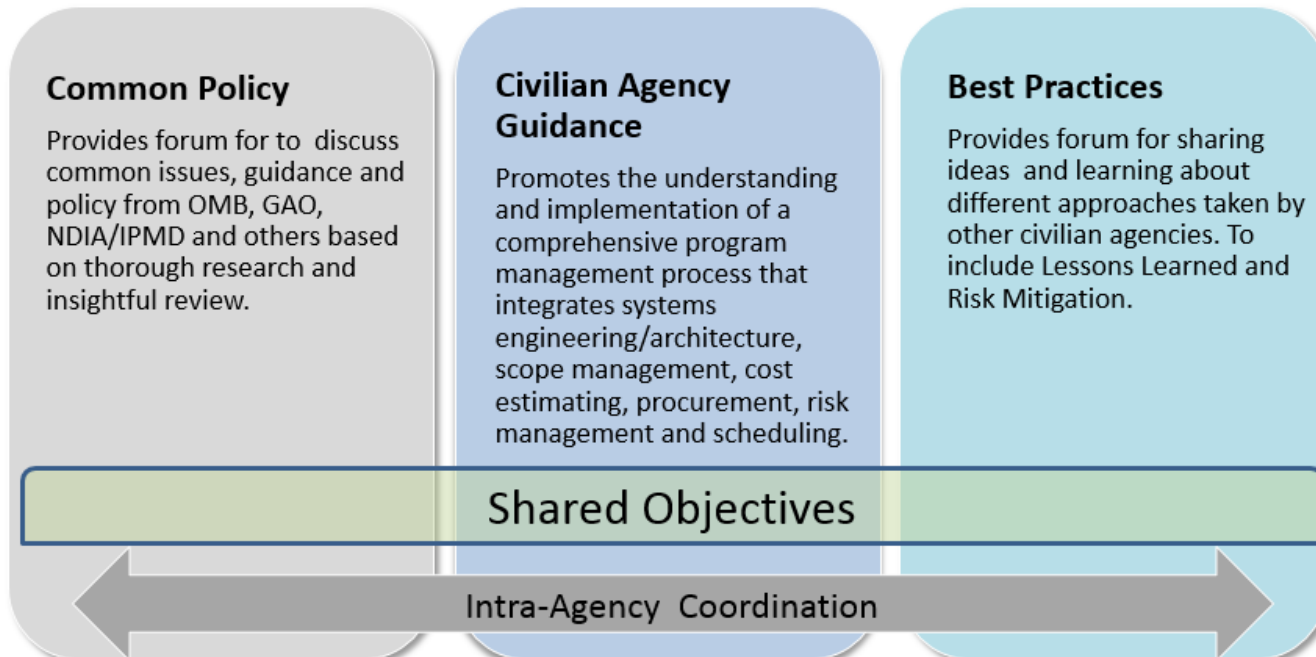


Melvin Frank
Melvin.Frank@hq.doe.gov



Neil Albert
nalbert@nfaconsulting.com

Objectives:



Items from 11/15/18 Meeting



- **Government Co-Chair Transition**
- **CAIWG Purpose, Function and Value Proposition**
- **Adequate Performance Management within OTAs, Streamlined Acquisitions or Smaller, Less Complex Programs/Projects**
- **Reciprocity: Current-Status and Collaborative Initiatives for Advancement**
- **Academic Research Study - Improving the Reliability of EVMS: Development of an EVMS Maturity Level Rating Index**




CAIWG Value Proposition – Is there more?



- **Federal members act as on-call service organization/peer support to other Federal agencies on an as needed/called basis?**
- **Add value through short-term consulting/part-day sounding board venues for those members/agencies confronting new issue or needing peer review of papers/presentation?**
- **Other ideas to increase CAIWG value?**

Adequate Performance Management within OTAs, Streamlined Acquisitions or Smaller, Less Complex Programs/Projects

- **This IS NOT EVM Lite – EVMS by any name requires compliance to EIA-748**
 - **Question: For some programs/projects, is it desirable/acceptable to implement an alternative project control system and not an EIA-748 compliant EVMS?**
 - **If so, what are these alternative project controls and are they adequate?**
 - **What risks/uncertainties/unknowns are being accepted by going to something less rigorous than EIA-748 EVM?**
- 

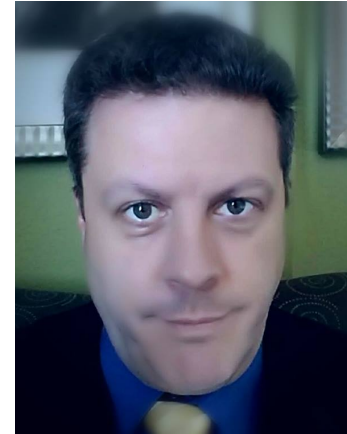
- Where was this initiative left/what have Federal agencies done to implement?
- What are the concerns with reciprocity arrangements?
- Can agencies collaborate more effectively on joint reviews/participate in another agency's review?

EVM in Production Exploratory WG

Overview/Mission:

To assess the appetite in Industry for updating/refreshing the EVM practices on production contracts with an EVMS requirement.

Leadership:



Scott LaFrance
Scott.Lafrance@baesystems.com

Objectives:

- Evaluate the current guidance and documentation regarding the performance of EVM on production contracts.
- Evaluate common issues related to EV in Production practices.

Most Important Comment

NDIA-IPMD Award Program

Name of Award	<i>“NDIA IPMD Distinguished Service Award”</i>
Criteria	Significant contributions to IPMD NDIA
Eligibility	Any Member or Working Group
Recipient Nominations	Individual, possibly small group via NDIA IPMD BoD
Approval	2/3 vote from BoD
Frequency	As appropriate
Award Program Coordinators	John Duval

Award Program Honorees



<u>Name</u>	<u>Date</u>	<u>Recognition</u>
Kathy Dailey	Aug 2016	Leadership of the Agile and EVM Working Group
Joan Ugljesa	May 2018	Years of Dedication to Division
Team:	February 2019	Leading PM Track at SE Conference
<i>Vaughn Schlegel, Lisa Hoffman, Reggie Grant, John McGregor, Karen Kostelnik, Neil Albert, Gary Humphreys, Andrea Nibert</i>		
Randy Steeno	February 2019	Years of Dedication to Division

Come to the Stage

- **Vaughn Schlegel**
- **Lisa Hoffman**
- **Reggie Grant**
- **John McGregor**
- **Karen Kostelnik**
- **Neil Albert**
- **Gary Humphreys**
- **Andrea Nibert**