Planning & Scheduling Working Group (PSWG)

Winter 2019 Meeting Out Brief

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:

Lisa Hastings
Lisa.Hastings@ga-asi.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

Planning & Scheduling WG Topics

- PASEG v.4 Refresh
- New GL 6 EVAS Test Metrics
  - Schedule Margin (SM)
  - Schedule Visibility Tasks(SVTs)

PASEG 4.0 – New Content

Scheduling in Agile

- Developed in collaboration with the Agile EVM group
- New Glossary additions:
  - Sprint
  - Epic
  - Feature
  - Story
- Rolling wave/Sprint planning
- Things to promote:
  - Model features in the IMS
  - Align Rolling Wave Planning with Agile Increment Planning
- Things to avoid:
  - Do not model sprints in the IMS
  - Do not model stories in the IMS

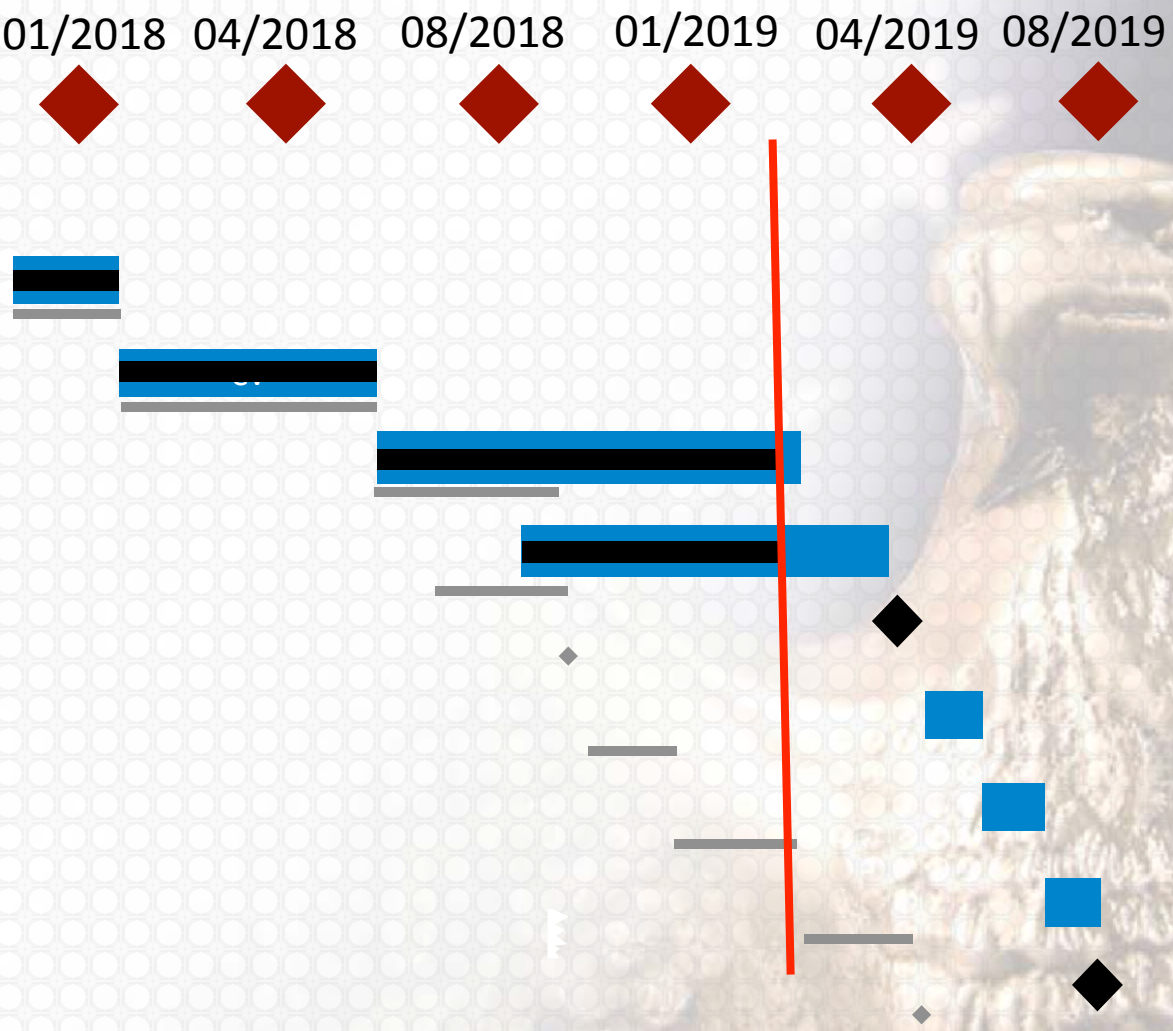
Scheduling in Construction

- Developed in collaboration with Department of Energy
- Planning with the use of "commodity curves"
- Often uses hyper-detailed work plans that change on a daily basis
- Nuances of subcontractor integration
- Use of subcontractor "Schedule of Values"
- Things to consider: Level of detail

PASEG 4.0 Refresh – POA&M

NDIA IPMD

PASEG Milestones



New GL6 EVAS Tests - SM

EVMS Test Metric Specification

1. Guideline No:	2. Unique Test Metric ID:	3. Test Type:	4. RESERVED
06	06I101b	Manual	

5. Intent:
06: Schedule margin, an optional management method for accommodating schedule contingencies, must be traceable to the risk register and consistently identifiable in the IMS.

6. Test Step:
Do schedule margin tasks represent risk impact to subsequent major milestones?

7. Test Metric:	8. Metric Threshold:
X = Count of schedule margin tasks that do not represent risk impact to subsequent milestone	X = 0

9. UN/CEFACT Required DEI(s)

10. Data Elements R
11 Integrated Master S
11A Actual S
11C Actual F
11AJ Successors

11. Assumptions:
1. Schedule margin tasks exist in the IMS; if no schedule margin tasks exist, skip this metric

12 Instructions:
1. Identify and count all schedule margin tasks:
   a. not tied to a formal Risk Management process
   b. with Actual Start date not equal to Actual Finish date
   c. without a major milestone successor
2. Add the number of schedule margin tasks identified in steps 1a, 1b, and 1c; this is the value (X) of the test metric.
3. If X=0, the metric passes.

Identify and count all schedule margin tasks:
a. not tied to a formal Risk Management process

Planning & Scheduling WG Topics

- **IPMR DID [3.7.2.4]**
  - *"Schedule Margin is associated with schedule risk as part of a formal risk management plan."*
- **IPMR Implementation Guide [4.14.2]**
  - *"Schedule margin durations should represent the estimated schedule risk/uncertainty to the subsequent event/activity and be traceable to the program's risk management system."*
  - *"One common method of estimating schedule margin duration(s) is to use the results of a Schedule Risk Assessment (SRA) to identify the amount of time between the deterministic finish (calculated without the presence of schedule margin) and a more likely completion determined by the finish date at a desired probability/confidence level."*

New GL6 EVAS Tests - SVT

EVMS Test Metric Specification

1. Guideline No:	2. Unique Test Metric ID:	3. Test Type:	4. RESERVED
06	06I201a	Manual	

5. Intent:
06I: Schedule Visibility Tasks (SVTs), if used, must be separately identified and controlled to represent non-PMB tasks/activities that could impact the logic driven network, and consistently identifiable as "SVT" in the IMS.

6. Test Step:
Are Schedule Visibility Tasks (SVTs) identified and controlled in the IMS?

7. Test Metric:
X = Count of incomplete tasks/activities that are not properly identified and controlled as "SVT" in the IMS

8. Metric Threshold:
X=0

9. UN/CEFACT Required

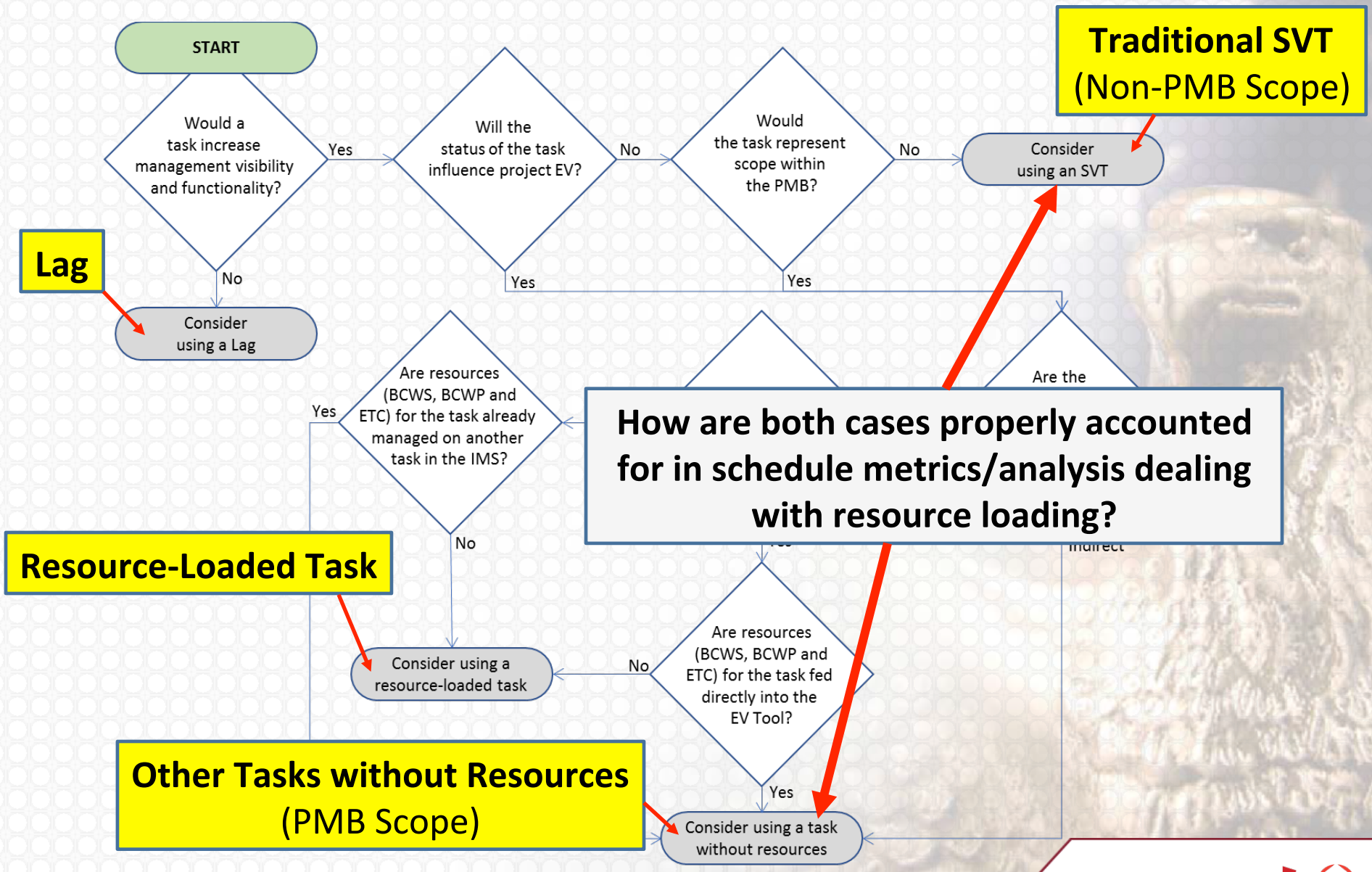
10. Data Elements Required:
11 Integrated Master Schedule

11. Assumptions:
1. Incomplete WPs, PPs, and SLPPs equals no actual finish date in the IMS.

12. Instructions:
1. Count the number of SVTs not properly identified.
2. Count the number of SVTs that represent scope in the PMB.
3. Count the number of SVTs that have resources assigned.
4. Add the counts from Steps 1 through 3; this is (X) of the test metric.
5. If the result is within the threshold (Block 8), the metric passes.

Count the number of SVTs not properly identified.
Count the number of SVTs that represent scope in the PMB.

Draft – SVT Decision Tree



Thank You