

Practice Symposia

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Industry: Ray Stratton

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Kelly Meassick, PMP, Charter Performance Management Group, LLC

ABSTRACTS & BIOS

PS 01 - The 5 Ingredients in the EVM Secret Sauce

Are you having difficulty finding qualified program controls resources? Do your executives understand the value of earned value? Over the past 2 years in conjunction with PMI-CPM, Deltek has hosted several workshops to identify what the top 5 challenges facing program controls practitioners are and the best practices to solve them. In this session, you'll learn practical techniques in use today to solve the top problems we all face and have an opportunity to share innovative ideas of your own. Whether you're a seasoned EVM guru or a project management noob, you'll enjoy this informative session packed with easy-to-use informational takeaways.

Chris Bell

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Chris Bell is the Vice President of the Enterprise Project Management group at Deltek, a leading provider of program controls and earned value management software for project focused businesses. Chris has a passion for moderating industry panels and workshops to identify the root cause of today's most pervasive challenges facing program controls practitioners. With over 15 years in the project management and technology field, Chris has been invited to speak at many conferences such as Integrated Program Management Conference (IPM), Project Management Institute (PMI) Global Congress, Earned Value Customer Advisory Council (CAC), Association for the Advancement of Cost Engineering (AACE) and many others. Chris' combination of industry experience and technology vision makes him an enthusiastic and effective speaker/moderator. He holds a Bachelor of Science degree from Mansfield University, and has completed graduate work at Boston University and Oklahoma State University. He also holds certifications from the Construction Industry Institute and Arizona State University. Before joining Deltek, he was working as an Industry Manager for Primavera Systems.

PS 02 - A Crawl, Walk, Run Approach to EVM Implementations

Earned Value Management System (EVMS) implementations often fail because organizations wait until the last minute to implement a fully compliant EVMS in a flash cut over. Not only is this costly and less than productive; it usually lacks the key ingredient of senior level executive support; and it usually leaves the stench of EVM failure behind for a long period. A less expensive, and generally more successful, approach is to build an organization's EVMS through a crawl, walk, run approach.

One road map for this crawl, walk, run, approach is to use the following as guidelines:

1. Use HHS' Tier 2 EVM system for the crawl phase
2. Use Level 2 of the Earned Value Management Maturity Model[®] for the walk phase
3. Use the full NDIA/PSMC Application and Intent Guides for the run phase

An overview of this crawl, walk, run approach is discussed; cross walks between each these phases of EVMS implementation and the EVMS artifacts recommended in the NDIA/PSMC Intent Guide are summarized; and the approach's actual use in DBTS' internal EVM System, as well as its use by some of the Clients of DBTS' EVMS Professional Practice, are used as examples.

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Mr. Tony J. Barrett is the Executive Vice President and Chief Performance Officer of DBTS, Inc. (DBTS). His primary responsibilities are expansion and management of DBTS' federal and commercial sector business lines, quality control and risk management for the company's finances, and establishing and operating a company-wide performance management system. A proven senior executive with multidisciplinary experience in high-level, technology and program management, Mr. Barrett brings more than 25 years of success and accomplishments to DBTS. Mr. Barrett has been continuously and personally involved in the design, implementation, and operation of Earned Value Management (EVM) Systems since 1997.

Mr. Barrett holds a BS in Marine Engineering from the U. S. Coast Guard Academy, a MS in Mechanical Engineering from the Massachusetts Institute of Technology, and a MS in Naval Architecture & Marine Engineering from the Massachusetts Institute of Technology. In addition, he is a licensed Professional Engineer (PE) and certified Earned Value Professional (EVP). Immediately prior to joining DBTS in 2007, Mr. Barrett was focused on program management for large-scale, enterprise-wide information technology (IT) projects and programs. This experience spanned requirements analyses through concept exploration, systems development, full-scale development, full-scale production, and operational deployment and support.

PS 03 - EVM in a Not-So-EVM-Friendly World

Earned Value Management requires two things: a plan and measurements of progress along that plan. What happens when you work in an environment that does not value planning? What happens when measurement – and the transparency that comes with it – is thought to be too hard to do, not worth the effort, or threatening to senior management? What can you do when your job is to provide this visibility anyway? This presentation will explore ways to derive EVM metrics in the absence of a formal commitment to EVMS. This exploration will highlight some strategies to avoid pitfalls that can obscure visibility, damage credibility, and be career-limiting if not handled adroitly.

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Saul currently is a Director with a large financial services company where until recently he led the development and implementation of the company's Program and Project Management Methodology.

Prior to assuming his current role, Saul spent more than 15 years as an independent consultant as well as leading project teams for Price Waterhouse and managing engagements for Accenture. Saul helped to shape business strategy, improve Program and Project Management practices, set up PMOs and implement project performance management systems including EVMS on behalf of clients such as Blue Cross Blue Shield of Florida, Covation, LandAmerica, Lifeguard, Humana, BondDesk, S1 Corporation, Keyeon, Bank of America, Wachovia, South Carolina Electric and Gas, MichCon, Vision Service Plan, McNeil Consumer Products, and TIAA-CREF.

Saul received a bachelor's degree from Rutgers University, where he studied Information Systems and Economics. He is currently enrolled in the Master of Project Management (M.P.M.) degree program at Western Carolina University.

PS 04 – Earning Value from Earned Value: Using EV to Improve the Probability of Project Success

As organizations move toward leaner and flatter operational structures, program management activities continue to grow as work is pushed down to teams of individuals. Measuring progress to plan in unit meaningful to the stakeholders increases in importance.

In this environment measuring progress with cost and schedule alone is not sufficient. At the same time applying fully compliant Earned Value is difficult to justify in the presence of Lean and Flattened organizations.

Determining which criteria of Earned Value to apply in this situation has been difficult for several reasons, not the least of which substantiating the business value of Earned Value. This presentation describes how focusing on deliverables can reveal which of the 32 Earned Value criteria are important in a variety of business and technical domains outside of full DCMA compliance.

In this method Earned Value information is combined with Physical Percent Complete and Technical Performance Measures to assure actionable information is available in units of measure meaningful to the decision makers.

This paper presents a project management method constructed around the five (5) Earned Value process areas: Organization, Planning and Budgeting, Accounting, Analysis, and Revisions Management. These 5 areas guide project managers in the programmatic control activities in support of the technical product or service development. From system capabilities, to requirements, the performance measurement baseline, and executing this baseline, earned value principles guide the discovery and management of the projects deliverables and the measure of their physical progress to plan.

Glen Alleman

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Glen Alleman is Vice President, Program Planning and Controls for Lewis & Fowler, Denver Colorado. Glen defines, develops, deploys, and assures the benefits of Lewis & Fowler's defense and space program management and business process improvement offerings. These include Deliverables Based Planningsm, an Earned Value and Technical Performance Measure based program management method.

Glen's background includes a formal education in Systems Management, experience in both commercial and aerospace & defense program management, and software development of embedded control systems.

PS 05 - AgileEVM – Earned Value Management Goes Agile

Earned Value Management was successfully migrated from the traditional project management environment to the agile space (Sulaiman, Barton & Blackburn - Agile2006) and is finding its way into the practices of those who lead larger Agile projects, and those who have to report into an organization that has moved to Agile methods but is used to Earned Value Management metrics.

AgileEVM is a simplified set of earned value management calculations. Using only five initial values and four data points, AgileEVM adds almost no overhead to an Agile project and adds particularly valuable cost performance information. Adding AgileEVM to Scrum projects yields simple and effective “what if” scenarios for balancing scope, schedule and budget across a release. The balanced information helps keep focus on “building the right things” as the project progresses, giving team members, product owners and stakeholders valuable information for making better decisions.

AgileEVM is intended to help ScrumMasters, Product Owners, Project Managers, Product Managers, Program Managers and other Agile Stakeholders involved in product delivery.

The presenters will explain key Scrum project management concepts, describe their research and

methods in adapting traditional Earn Value Management to fit Agile practices, and review the AgileEVM tool developed to support Agile projects, programs and portfolio's.

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Tamara Sulaiman is managing consultant at Applied Scrum, an IT consulting organization dedicated to the exploration and understanding of the implementation of practical applications of Agile and Scrum. At Applied Scrum, Sulaiman is focused on coaching teams and organizations transitioning to Agile software development. Sulaiman brings more than 20 years of experience in management across a spectrum of industries including: information technology, construction, international development and education to her consulting expertise. She is a Certified Scrum Trainer (CST) and Project Management Professional (PMP).

Sulaiman is co-originator of the Agile Earned Value Management (EVM) materials, a process recognized for integrating the traditional project management practice of EVM with the Scrum framework. She is currently serving on the Agile Alliance Board of Directors. As a thought leader, Tamara continues to publish articles on Agile related topics in industry publications such as Agile Journal, Methods and Tools, InfoQ, Projects@Work and Gantthead.com.

Brent Barton, SolutionsIQ

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Brent Barton plays a key leadership role in implementing the strategic vision of SolutionsIQ as an Agile organization. Brent continues to drive the growth and development of SolutionsIQ's Agile development and consulting services, addressing such key issues as delivering greater value to customers.

Highly regarded as a Certified Scrum Trainer and Agile coach, Brent is recognized as an international leader in Agile consulting and thought leadership. He brings more than 15 years of technical experience as a consultant and mentor to his role as CTO. Through Agile methodologies he helps companies successfully build software better and faster. He is one of the co-author of "AgileEVM - Earned Value Management in Scrum Projects".

PS 06 - EVM in Commercial Industries

Earned value management (EVM) is much more than implementing tools and training personnel on the proper use of the tools to insure every dollar is being accounted for. Historically, EVM in the commercial industries has been mostly thought of in that vein. Commercial organizations often believe that EVM can be of no use to them because they do not execute government contracts. However, a paradigm shift is occurring. More and more commercial entities are beginning to realize the value of EVM in their organizations. Rightly so, the emphasis of most commercial entities is on getting their product or service to market quickly while achieving the business objectives of the organization. With that emphasis, it is easy to see that EVM must be a system that is not viewed as a financial burden that slows time to market. EVM in a commercial company must be robust, seamless and contribute significantly to the business objectives. Ernst

& Young, LLP Program Advisory Services Practice brings that robustness and seamlessness to commercial clients in a way that reduces waste, implements the necessary governance and decision framework and achieves the business objectives of the organization. This presentation will focus on how Ernst & Young, LLP Program Advisory Services Practice brings EVM to the commercial client. The presentation will explain the forces that are causing commercial entities to implement EVM in their organizations and how they are doing it. This presentation will also explain the methodology used by Ernst & Young, LLP Program Advisory Services Practice to implement EVM into a commercial entity and how cost, schedule and performance within those organizations is enhanced as a result.

Jay Smedley, Ernst & Young LLP

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Jay is a Complex Program Manager with Ernst & Young LLP, a global leader in Program Advisory Services. Jay is dedicated to advising Fortune 500 clients in a variety of commercial industries in Complex Program Management. Jay specializes in Performance Management through implementation of earned value management strategies with commercial clients. Jay assists clients in developing the governance and decision framework to drive complex, global business & technology programs to successful completion.

Jay has over 25 years of experience in Project/Program Management. He has managed large, global IT endeavors in Europe, Asia/Pacific and North America. He has an extensive track record of successful execution and delivery of global, custom, complex programs with extensive risks and opportunity, assessing troubled projects and providing remediation strategies to facilitate their recovery. He has designed, directed and deployed large PMOs and supporting Enterprise Project Management Systems for IT endeavors. His information technology skills include successful execution and delivery of ERP initiatives related to Corporate IT strategy and planning, Department of Defense C4I systems, cyber security and risk assessment, solution and technology architecture design, custom systems development and package implementations.

In addition to Ernst & Young LLP, Jay has held senior and executive positions with BAE Systems and Dako, North America where he functioned in program management, systems and software engineering, and PMO Director roles. Jay is a retired U.S. Marine Corps Intelligence Officer with 24 years active service.

PS 07 - Work Authorization System

The work authorization process is the central element of any management control system. Before work can begin, the work authorization system must define and identify the work to be done, the organizational element responsible, and the completion criteria for the work. Work must be authorized and include information tied to the program statement of work. Authorization to perform contract work and expend resources is communicated from contract award or authority to proceed (ATP) from the customer to the program manager down to the responsible organizations, control account managers and ultimately to the individual contributors via documentation. The system is created uniquely by every organization. This session will cover an approach with regard to soft and hard repository options, processes/ procedures and quality control. The Q&A portion will gather additional best practices from the participants.

Barbara Phillips, PMP, BAE Systems

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Barbara Phillips is a senior principle management consultant with BAE Systems EVMS Certification Initiative. Barbara is responsible for designing and developing earned value

management systems for internal and external customers. She has more than 10 years experience in project management training and process development. Her process improvement efforts extend the life cycle of a project and span from work instructions to processes to system description documents. Barbara has advanced to expert knowledge of earned value tools including MS Project, Deltek Cobra and Deltek WinSight.

Prior to joining BAE Systems in 2004, Barbara worked 5 years with the Software Productivity Consortium (now Systems and Software Consortium Inc (SSCI)) as a principle management consultant performing project management consulting services to major defense contractors. As a project manager, she monitored and controlled consulting projects using earned value data. As a senior consultant for Booz Allen & Hamilton, Barbara documented requirements and monitored qualify for the Department of the Treasury.

Barbara is a PMP and has served on the PMI Washington (PMIWDC), Board of Directors since 2004 and volunteered since 2001. She is a member of NDIA PMSC and PMI-CPM.

PS 08 - Utilization of EVM Metrics and Data in the Development of Life Cycle Cost Estimates & Cost Benefit Analyses

This paper will help define and examine the challenges and opportunities of using EVM in the development of Life Cycle Cost Estimates (LCCE) and Cost Benefit Analyses (CBA). The purpose of the LCCE and the CBA is to ensure that programs and projects are acquired on the basis of LCC, Return on Investment (ROI) or most benefit. The advent of ANSI/EIA-748 and the increased leveling of OMB 300 requirements have led EVM to the intersection of LCCE and CBA.

This paper will demonstrate the use of EVM metrics in LCCE development and updates and will also demonstrate that EVM variance analysis reports can lend itself to the CBA. Cost and schedule data from the contractor's EVM system can be used to fine tune cost estimates. Sensitivity Analysis of the LCCE can benefit from the Estimate-At-Completion (EAC) calculations. The Program's Risk Matrix developed using EVM metrics and variance analysis reports can be used in the development of the LCCE Risk Analysis. Operation and Maintenance (O&M), the largest portion of the LCC, are largely viewed as service level contracts. EVM reporting requirements have been levied on many O&M contracts given their dollar value. O&M costs can be established/estimated commensurate with program, technical, cost, and schedule risks. Program EVM performance data (O&M phase) can be captured to trend impact on future benefits. The use of EVM metrics can strengthen the cost analysis/estimating process. The use of EVM metrics can lend a degree of realism to the estimating LCCE and CBA processes.

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Kenneth P.N. Thomson - Technical Business Director, SERCO North America

Mr. Thomson has over 18 years of professional experience in cost estimating, analysis, financial advisement, and cost modeling for Navy, Air Force, Army and Marine Corps weapon systems, various avionics programs, and military financial plans and systems. He provides direct support to DOD and other federal agencies. Mr. Thomson provides financial expertise on cost-related matters by identifying strengths and weaknesses in cost models, ensuring and analyzing the cost advantages of various alternative solutions to government programs. He has performed Life Cycle Cost Estimates (LCCEs), Cost Benefit Analyses (CBAs), Analysis of Alternatives (AoAs), and Business Case Analyses.

EDUCATION: B.S. Economics, Iowa State University; M.S. Cost Analysis, Air Force Institute of Technology (AFIT)

CERTIFICATIONS: APDP Level III, Cost Analysis

MEMBERSHIPS: SCEA, AACE

Anthony J. Chandler - Technical Business Consultant, SERCO North America

Mr. Chandler has over 23 years of experience and performance of cost analysis & estimating, life-cycle cost estimating (LCCE), Total Ownership Cost (TOA), Cost Benefit Analysis, Analysis of Alternatives (AoA), and System Acquisition. Mr. Chandler has Verification, Validation & Accreditation (VV&A), Contract Performance Measurement, Analytical Methods in Management, Financial Program Controls and Earned Value Management experience in the DoD acquisition arena as well as in private Industry. As a manufacturing engineer for the Boeing Company, Mr. Chandler applied analytical skills and manufacturing knowledge in the area of production planning and material estimating.

Education: BS, Industrial Manufacturing Engineering, Rensselaer Polytechnic Institute, Troy, New York.

MEMBERSHIPS: AACE

PS 09 - Variance Analysis Reports

After all the books have closed and the data analyzed, there remains one last critical step in the monthly EVM process: Communicating the results. Encouraging certain members of the program team to effectively relate the cause, impact, and corrective actions associated with program variances can be one of the more difficult jobs of a program control analyst. In addition, the recent increase in surveillance activities makes the submitted program variance analysis reports subject to more scrutiny than ever before.

This class will establish the basic requirements for a well written VAR. The lesson will begin with a brief review of data analysis and terminology, but quickly focus on the necessary components of the Format 5 variance analysis report. There will be a review of the essential subjects that must be included to satisfy the CPR DID for Format 5 Explanations and Problem Analysis. Then a deeper instruction will focus on how to write an analysis of performance that effectively communicates to the reader the significant issues in the EVM data. This will include a discussion of common pitfalls in many variance analysis reports, and tips on how to avoid them. And finally the lesson will cover how to structure a variance reporting system within an organization to efficiently create a variance analysis report package in support of a monthly reporting cycle.

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J. Greg Smith is the Program Cost and Schedule Manager for L-3 Communications in Salt Lake City where he manages a group of professionals responsible for the Earned Value Management of this large and diverse company. He has earned an MBA from the University of Houston and a Masters in Industrial-Organizational Psychology from Texas A&M University, plus he completed the in-resident Program Management Office course at DAU. He has 24 years of program management systems experience in both industry and government.

As a Program Control Lead with NASA for 17 years, he was the Earned Value Focal Point for the Space Shuttle Orbiter and International Space Station programs. In this capacity he functioned as a Review Team Chief for the implementation of EVM across the Space Station Program.

Greg then made the jump to industry when he became the Program Control Manager for the ICBM division of Northrop Grumman. There he managed the cost and schedule performance, and the associated program control workforce, for a multi-billion dollar Air Force contract that included two ACAT 1D programs. With Northrop he was also a member of the Mission System Sector's EVM Focal Point Council..

Over the years he has also worked with Humphrey's & Associates, primarily as an instructor of their EVM and Scheduling classes. Most of this was a part-time association, but he was employed full-time with H&A for a year where he worked towards the validation of the multi-billion dollar Waste Treatment Plant program with the Department of Energy.

PS 10 - Advanced Schedule Analysis Techniques

Your job is to determine how "good" a schedule is? How do you go about doing that? What you need is a process and some tools. This presentation will help develop or improve your processes and tools, so that you can perform useful analysis on schedules. Starting with standard Health Check Metrics, other forms of analysis such as trending, comparison, and extrapolation will be explored. Development and automation of analyses will be covered. The entire presentation will be sprinkled with tips, tricks, and traps. What metrics to run in which situations and in which phase of the project will be discussed. Just as important as providing answers, this presentation will help you develop the questions.

John Krahula, PM Metrics

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John has over 19 years of project management experience in major commercial and government contracting environments along with extensive experience in developing and implementing project management control systems in diverse and demanding business environments such as aerospace and defense, energy, telecommunications, and municipal governments. An expert in planning and scheduling, he has developed tools for extracting data for analysis and reporting, and earned value management systems. John has a wealth of practical project management knowledge with strong technical expertise in a wide variety of software tools.

PS 11 - Independent (Statistical) EAC: The Catalyst for Positive Project Performance and Successful EVM Adoption

In the current EVM environment, when our communication is often dominated with words of oversight, surveillance, and certification, it is imperative to preserve and emphasize the key principles that make EVM a preferred project management tool. Independent EAC as a key EVM principle that has too often been de-emphasized, devalued, or forgotten in the practical implementation of EVM. This presentation introduces communication and application techniques for making Independent EAC a key focus in EVM implementation. Elevating Independent EAC in this fashion can provide an immediate value proposition from which business, project, and engineering resources can all benefit. Weaving Independent EAC throughout the fabric of the development effort can actually engage the appropriate decision makers early enough in the development effort increasing the opportunity for positive performance. This approach has

successfully resulted in the adoption of EVM into an R&D business and has significantly improved individual project performance. Organizational culture, behavioral, and technical hurdles that were encountered are reviewed and discussed.

Kipp Wendland, Senior Financial Analyst, Harris Corporation,
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Mr. Wendland has over 15 years experience in project management, program administration, scheduling, bids and proposals, and R&D finance. Kipp has provided direct EVM support and implementation in both the DOD program arena as well as the commercial R&D arena. He has implemented EVM on over 20 development projects. In the last three years, Kipp has had the opportunity to experiment with emphasizing certain EVM techniques or principles in an internal research and development environment and studying the performance and adoption responses. He is currently leading the institutionalization of EVM techniques for Internal Research and Development at Harris Corporation, RFCD. As a divisional project management expert, Kipp has developed and implemented policies and plans for implementing program and project level EVM. Kipp has also developed and provided EVM training programs.

Kipp holds a BS Industrial Engineering from Alfred University, a MS in Management from Roberts Wesleyan College, and is currently pursuing a masters certificate in contract management from George Washington University

PS 12 - Enhancing The EVM Discipline: Lessons Learned from Aviation

Looking beyond the borders of one's discipline can often yield useful insights not otherwise apparent. This seminar explores how the collective dialogue regarding Earned Value Management could be enhanced by looking outside the program management discipline entirely. In this case, we examine professional aviation and demonstrate how EVM system designs and implementations might benefit from borrowing a "page" from the flight manuals. Aviation textbooks used in aeronautical classes on the subject of airmanship and flight discipline provide frameworks through which to view the EVM discipline itself as a professional endeavor. The context of military aviation, particularly with respect to achieving and sustaining mission readiness helps provide unique insights into EVM training and development. Finally, exploration into checklist design helps translate detailed EVMS system descriptions into practical operational guidance for EVM practitioners of all experience levels.

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Pat Barker is a Principal in MCR's Executive Consulting Group. The group is responsible for Integrated Program Management support across MCR. As a Principal, Pat leads a variety of small, special-purpose teams and provides consultant efforts and workshops for Industry and Federal Agencies, including DoD programs. Efforts concentrate on interdisciplinary tasks, particularly those linking EVM, Risk, System Engineering, Cost and Schedule. He currently leads MCR's efforts to enable a mid-sized defense company establish an Earned Value Management System and plays a key role in helping a major FAA program implement and maintain an EVMS implementation.

Prior to joining MCR Pat has over 20 years' leadership, training and analysis experience in military and civilian positions, to include program office team leadership, modeling and simulation

development and policy guidance in various DoD and civilian capacities. Academic experience includes a 4-year tour as an Assistant Professor of History at the USAF Academy and extensive background in training and course development for almost two decades. During his 20-year USAF career, Mr. Barker was also a B-52 electronic warfare officer and a functional manager in technology warning for the Defense Intelligence Agency (DIA).

Education: Pat holds a Bachelor of Science in Mechanical Engineering and a Master of Arts in History, both from Lehigh University. He has begun PhD coursework in Business Leadership.

Professional Memberships: Pat is a member of Project Management Institute (PMI) and the International Council on System Engineering (INCOSE). He is also a member of the National High School Coaches Association, Positive Coaching Alliance and the American Baseball Coaches Association.

PS 13 - Readyng Your Organization for EVMS Implementation

EVMS implementation requires change across the enterprise. The degree of change and scope of effort required to successfully implement the EVMS is influenced by many things including the company's project management processes and tools and the organization's ability to implement change. In this session, the 32-Guidelines published in the ANSI EVMS Standard will be reviewed and used as a basis for measuring an organization's project management maturity and readiness to implement an ANSI-compliant EVMS. Attendees will receive an assessment survey that can be used to assess their individual organization's readiness for EVMS implementation.

Candi Randolph, PMP, Charter Performance Management Group, LLC

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Candi Randolph is co-founder of Charter Performance Management Group and has over 20 years of Project Management and EVMS implementation experience. Candi began her career in the Aerospace and Defense industry where she was the Project Manager and lead engineer for the design, development and implementation of a custom EVMS. In 1996, Candi began a 10-year consulting engagement with the Defense Finance and Accounting Service in Indianapolis where she managed large-scale IT programs. She currently provides EVMS consulting and training services to companies implementing Earned Value Management Systems and teaches project management classes including a Project Management Professional Certification Boot Camp. Candi holds a B.S. degree in Computer Science and is certified by the Project Management Institute as a Project Management Professional.

PS 14 - Creating and Implementing an EVMS in 90 Days or Less

Who wants to save some serious money? Who doesn't? There is a way to save a lot of money when you are creating and implementing an earned value management system (EVMS)...do it quick; real quick. Over the years, we have somehow convinced ourselves that the creation and implementation of an earned value management system is supposed to be gut wrenching, soul crushing, never ending work. Why is that? Really?

This is something we now know how to do. It follows a well defined process: design, develop, integrate, deploy, and operate. Full stop. End of story. Get to work. So, why does it take twelve months, eighteen months, even longer to get through those well known steps? What are the barriers to quick-stepping through the process? Where—and more importantly, why—do we consistently fall

short of world-class behavior? Are we simply too simple, i.e., dumb? Too lazy? Too scared? Or, do we just not know?

This is the time and place to find the answers to those questions. Here you will find an approach to EVMS implementation that doesn't waste resources: not money, not people, and certainly not time. Here you will find a plan of attack; a way through the brambles and briars; a superhighway to success. Here you will find a rationale approach to a relatively complex process in relatively simple steps. Here you will find hope, belief, action, results, success.

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Sean Alexander has been involved in the field of project management for over 30 years. For the past 25 years, as a consultant, he has assisted over 100 organizations in four countries and has scrutinized the operation of over 500 projects that range in size from \$50 thousand to \$8 billion.

Sean's experience with EVMS includes the creation of over 45 management systems, participation in over 40 earned value management systems validation/certification reviews, and the training of over 25,000 individuals at all organizational levels. Sean's training programs include all aspects of project management, earned value management systems, surveillance review processes, team dynamics, management development, and train the trainer courses.

Sean has supported professional conferences and trade groups as a sought out speaker for various professional organizations and symposia including the Project Management Institute (PMI), the College of Performance Measurement (PMI/CPM), the International Council on Systems Engineering (INCOSE), Society of Cost Estimators and Analysts (SCEA), the Performance Institute, ProjectWorld, and the Project Leadership Conference.

Sean's clients are from both the public and private sector, and include a diverse cross-section of domestic and international organizations. A sampling of past and present clients include AT&T, Boeing Helicopter Company, EDS, General Dynamics, General Electric, IBM, The Johns Hopkins University, Litton Industries, Lockheed Martin, Lucent Technologies, Raytheon Systems Company, SPACEHAB, United Space Alliance, United Technologies, Telecom Australia, Bombardier (Canada), Marconi (UK), NASA, US Navy, US Air Force, and the Department of Commerce.

Sean is Founder & President of VitalThought.

PS 15 – Core Competency Management System

In the quest to insure the successful implementation of a comprehensive management system to foster a mature infrastructure and achieve full core competency integration this guided lecture/forum will discuss the implementation of an Enterprise Management System (EMS). This methodology provides a powerful framework for integrating organizational core capabilities. This shared example will focus on the integration of cost estimating, earned value and schedule management into your organization for program success. The approach will focus on the implementation of these four primary tenets:

1. Benefits of core competency integration
2. Development and implementation of core competency working groups
3. Advanced capability infrastructure for CE, EV and SM
4. Achieving full assimilation of core competencies

The effort to integrate organizational core competencies provides the opportunity to realize the full potential and the core aptitude of the enterprise. The implementation of the EMS establishes a novel approach to leverage core competencies for your customers while insuring their evolution within your organization. This helps establish a unified approach to insure an enduring infusion of new ideas and the focus on continued enhancement of organizational capabilities. The outcome of this approach can offer new tools and processes, enhance employee skills, discover unique solutions to yield superior consultation and reward sharing and participation across the enterprise. When completed, the attendee will be able to:

1. Comprehend the four (4) primary tenets of the EMS approach and how it can be implemented successfully.
2. Analyze the value of utilizing these proven tools, techniques and lessons learned.
3. Synthesize the benefits of utilizing techniques for successfully integrating cost, earned value, and schedule management in an organization.

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James D. Quilliam, PhD, PMP is currently a principal Analyst in the Los Angeles Division of Tecolote Research Inc; a privately-held company that provides high quality, integrated services that rely on an empowered and experienced professional staff, proven business and analytical processes, and automated tools that are based on a strong knowledge of customer requirements and leading edge technology. He is currently implementing the Enterprise Management System (EMS) model within his organization and to support several customer teams. James has successfully assisted and consulted with organizations to help them foster and implement initiatives to produce intelligent, fact-based decisions to improve mission effectiveness, resource efficiency and resource savings. James is currently serving as Director of Government programs for the PMI College of Scheduling. His educational background includes a Bachelor of Science degree in Business Administration, a Masters of Business Administration and Ph.D. in Industrial and Organizational Psychology.

PS 16 - EVM for manufacturing and internal projects to measure performance and cashflow planning

A manufacturing company can be divided in two areas of interest for Project Financial Managers:

- a) Continuous cycles of production in which activities and resources are involved.
- b) Internal Projects like machines optimization and maintenance. This project involves activities and resources plus performance measures to see if the project justifies the money invested on it. This measurement is the EVM process.

Both areas have to define a cost matrix where each activity has its resources defined and costs associated. The first analysis gives the budget needed to complete cycle of production or the internal project.

The budget for the internal project will be used to compare the actual cost and percentage of advance to get the EVM performance information.

Once the cost matrix has been defined the need for money can be scheduled to be sure that it is allocated on time. Lack of cash can affect our areas of interest in the following ways:

- a) Close cycle of production: If a resource can not be bought in the middle of a production cycle, the demand of products will not be accomplished on time.
- b) The internal project like improvement of production machines and maintenance will not be ready on time and can cause delays and losses to the general production. Also will affect the EVM performance measure because of the project's delay.

The track of the expenses is a key issue to have information of Actual Cost and control which activity and material is demanding more money. The integration with Financial System is critical to get the information.

The incomes can be programmed to comply with the cash demand. All the company can be converted to a performance oriented approach. Daily closed cycles of production and internal projects can be controlled with a combination of activity-resource-costs and EVM.

Expenses, liabilities, incomes and planned incomes control give cash flow information to keep going the production cycles smoothly and the internal projects with good EVM performance indicators.

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At the present time I work from Guatemala for a swiss consultant company, PARM AG based in St. Gallen. My work area is Cost and Financial Engineering. I design economic models for project management and determination of unitary cost of products. My background is in Computer Science. I was the project manager for the development of the cost engineering software we use in PARM. I have experience in Microsoft and JAVA technologies. I also work with Business Intelligence. All the reports of the PARM software are generated by the Business Intelligence cubes. In Guatemala I run an e-business company focused on Business to Business e-commerce exchange. I am member of the CPM Global Advisory Group since May, 2008. Also I am organizing a group in Guatemala to become a PMI Chapter with the support of PMI Washington DC. I have scheduled a conference with PMI experts in Guatemala for April, with the sponsorship of IBM of Guatemala.

PS 17 - Minimize Finance Costs, Maximize Profit with Commercial Earned Value Performance Management [EVPM]

The presentation first examines the importance of earned value methodologies for the financial evaluation at a project level across all of the project process groups. This includes the importance and requirements for a common WBS-based structures to undertake scope control and the exchange of, time phased, cost and commodities / materials usage data with financial modelling and project control systems. Explained are the differences between traditional and commercial earned value techniques such as taking account of negotiated labor, material and equipment; supplier payment conditions, allowance for contingency and risk, the cost of financing, and finally revenue reporting. Examined is the sensitivity of the cost of finance and the process to ensure cash neutral positions throughout the project's execution phase. Examined is the importance of maintaining cash control and the sensitivity to the cost of finance and commercial conditions throughout the execution phase of the project.

The second part of the presentation examines the cost savings at a program level that can be achieved through minimizing the cost of finance. Examined is the structure of the combination of projects to facilitate the commercial cash position, then using Spending Variance [SPV] as a means of estimating cash surpluses or deficits and matching bank borrowings accordingly.

Case studies based on the presenter's experience are used to illustrate the process and lessons learnt.

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Roland Horat, Managing Director of Supertech Project Management Pty Ltd. Supertech is a Melbourne Australia based company providing project management services to the Construction,

Petrochemical, Telecommunications, Power, Aeronautic, Defense, and Manufacturing Industries. Roland has a total of 27 years experience in Project Management, Construction Management, Procurement, Contract Management, Civil and Structural Design in Australia, New Zealand, Papua New Guinea, South Africa, US, and United Kingdom.

Roland's consulting assignments include the development of engineering and construction critical path networks and schedules. Project resource and cost optimization. Project updates and schedule maintenance, performance evaluation with respect to time, cost and resource usage, reporting and trending to Earned Value Performance Measurement [EVPM] criteria. Other activities include: forensic investigation of project performance, claims analysis and preparation, project audits for compliance to CPM and EVPM criteria, advice on management strategies for corrective action and the management of projects on behalf of clients.

Roland is a specialist Critical Path Method [CPM] management control systems including the Earned Value Performance Measurement [EVPM] analysis and reporting to international standards. Roland provides training and assistance to companies seeking to implement EVPM systems and obtaining government accreditation. Clients include international companies such as BHPB, Telecom and Mercedes Benz to name just a few. Under Roland's guidance his company has developed a number of desktop and web-based project control, estimating and document management applications tailored to defense, construction, communications and IT industries.

Roland is a graduate from Monash University School of Engineering (Melbourne Australia) and has a Post Graduate Diploma in Project Management.

PS 18 - In Search of EVMS Reciprocity at the Corporate Level

Parsons Corporation was classified as a "major federal contractor" approximately five years ago, and currently holds billion dollar, cost reimbursable contracts with both the Department of Defense (DoD) and the Department of Energy (DOE). In 2005, Parsons initiated an effort to have its earned value management system (EVMS) recognized as being compliant with ANSI Standard 748 at a corporate level, an achievement that would seemingly benefit the U.S. Government just as much as the corporation. While the terminology used by Parsons' government clients to describe the process is slightly different (the DoD calls it an "advance agreement" while DOE uses the term "corporate certification"), the assumption by upper level management was that successes experienced on project-specific efforts for either agency could be effectively leveraged into a corporate system recognized by both. Nothing could be further from the truth, however, and this presentation will document the trials and tribulations that Parsons has experienced in attempting to achieve what has turned out to be an extremely difficult goal, along with recommendations for companies that are aspiring to do the same.

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Michael has over 20 years of experience in project management and project controls within both the government and private sectors. Since leaving the U.S. Marine Corps as a Captain in 1994, he has worked for several of the leading EPC firms in the industry, to include URS Corporation, Jacobs Engineering, and Kiewit. Currently, Michael is Vice President of Project Controls for the federal government-dedicated business unit of Parsons Corporation, headquartered in Pasadena, CA. In this capacity, he has traveled extensively to domestic and international project locations including Iraq, Russia, and Indonesia. Michael is also an adjunct professor at the University of Southern California, teaching graduate level courses in heavy construction estimating and scheduling.

Michael was certified as a PMP in 1999 (currently inactive). He has been an active member of AACE International since 1999, earning numerous professional certifications as well as currently serving on AACEI's Board of Directors as Vice President, Regions. In addition, Michael is an active member of both NDIA's Program Management Systems Committee (PMSC) and the Energy Facility Contractor's Group's (EFCOG's) Project Management Working Group (PMWG).

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Gary has over 34 years of experience in project controls working in the private sector on diverse projects within the petrochemical and federal government markets. Since graduating from college with a bachelor's degree in Construction Engineering, Gary has worked exclusively for Parsons. Currently, he is serving in a dual role as the EVMS Manager and the Scheduling Manager for Project Controls within the federal government-dedicated business unit of Parsons Corporation, headquartered in Pasadena, CA. During his tenure with Parsons Gary has worked on both domestic and international projects, as well as his current assignment in a management capacity, and has traveled extensively to domestic and international project locations including Iran, South America, and Russia.

PS 19 - EVM and Personal Productivity

OPPORTUNITY ***unstuck!***: Create Your Right Time, Right Place, and Right Opportunity

When was the last time you were at the right time, at the right place, poised for the right opportunity? Have you ever been there? Projects don't succeed by just "happenstance." They require planning and outstanding execution. Career opportunities aren't "happenstance" either.

In this paper, you will discover four Golden Keys that will enable you to take hold of your career or business for you to create your right time, right place, and establish a cycle of right opportunities.

The four important principles for you to get your right opportunity are not "rocket science", but are instead effective common sense principles that many professionals do not connect or do not implement successfully. These principles are: 1) Become a recognized expert, 2) Get emotionally engaged 3) Actively help others, and 4) Become an effective team member. These Golden Keys are presented from the perspective of a project manager, program manager, or team member.

If you are not getting the best opportunities, the best projects or the best people on your project, this session is for you. What was the situation that surrounded the author receiving the phone call for his right opportunity? During planning and execution, how do you become a recognized expert, get emotionally engaged, actively help others, and become an effective team member? How do these Golden Keys guarantee even more opportunities? It is not luck; it is purposeful execution of proactive, effective steps.

Tom Sheives PhD, PMP

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Tom is President, Project Consultant and Coach and Speaker with his company Better Project Results, Inc. Tom has recently taught for the University of Texas at Dallas where he delivered 52 days of project management training to over 175 top executives and project managers with the

Panama Canal Authority as they prepare for the new \$5.25 Billion Canal Expansion Program, voted March, 2006 as the Samoter "Most Significant Construction Project in the World." Tom's new book to be released March 2009 is titled OPPORTUNITY *unstuck!* And showcases his Panama experience as a background case study to implementation of the four Golden Keys to create your right time, right place, and right opportunity.

Tom has coached, mentored and trained project teams from companies such as Texas Instruments, Lockheed Martin, USAA, IBM and Microsoft. He enables companies to develop a solid methodology in project management. Tom has written and delivered training for PMP® certification, PM Fundamentals, Requirements Development, Leadership and Teaming.

Tom is a graduate of Texas A&M, Baylor University, University of New Mexico and Coach University. He is also trained to deliver project team assessments, several 360° assessments, the Winslow Personality Assessments, and the Personal Coaching Styles Inventory.

Tom is a Registered Education Provider for the Project Management Institute, PMI Fort Worth Chapter Board Member and an active staff member at the University of Texas at Dallas.

PS 20 - TIPS AND TRICKS FOR TRACKING STATUS AND EARNED VALUE USING MICROSOFT PROJECT

Microsoft Project is one of the most popular scheduling tools used by Project Managers. While Microsoft Project is not considered an Earned Value Management tool, it does contain the data needed to perform Earned Value analysis. But, most people, tracking Earned Value using this tool, will tell you it is very difficult to do, or that it cannot be done.

In this presentation we will give you some tips and tricks that will make it easier to track Earned Value using Microsoft Project. Although the focus of this presentation is on tracking Earned Value you will find that many of the tips and tricks presented are useful for tracking schedule status in MS Project.

Some of the areas covered include: getting help on field definitions and how fields are calculated; setting the baseline and status dates; setting up a tracking view and saving views and tables; setting the timescale to match your reporting periods; understanding how MS Project distributes Actual Work and the effect on Planned Work and BCWP; using Physical % Complete instead of % Complete; disabling MS Project from calculating Actual Cost automatically; and using a tracking view to update status and actual costs. We will wrap it up with a Question and Answer session.

David Radkovich, Subsystems Technologies – Picatinny Arsenal, NJ

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David Radkovich is an experienced and seasoned Global Project Manager both in the private and public sector. He is currently an Earned Value Analyst working on the US Army's Electromagnetic Gun Program with oversight of the Earned Value Management (EVM) System and assisting in the integration of an Enterprise Project Management system.

Previously, David was a Service Delivery and Program Manager for Schlumberger where he was

responsible for the completion of projects and services to private and public customers. David has worked internationally, conducting technology refresh projects and services in South America, Europe, and Asia. He lived in Jakarta Indonesia for three years where he ensured consistent global methodology, practices, tools, and service level agreements were applied on projects for over 50 customers throughout Asia.

David achieved his Project Management Profession (PMP) certification from the Project Management Institute (PMI) in early 2007. He took the exam for the Association for Advancement in Cost Engineering's, Earned Value Professional (EVP) Certification in May 2008, and was certified September 5th 2008. Additionally, he has received a Graduate Certificate from the College of Performance Management (a component of PMI).

A highly motivated, energetic, and generous volunteer, David consistently contributes to the project management profession. He is actively involved in a PM Lessons Learned networking group and conducts a monthly conference call to empower Project Managers, and people studying to be PMs. His recorded podcasts have received over 1,000 downloads.

**PS 21 - "Reverse Engineering –
Successful Earned Value Management (EVM)
Implementation: What you need to know before selecting an
EVM software tool"**

Many organizations fail to realize benefits of their Earned Value Management system due to their implementation approach. Successful implementation requires careful development and introduction of supporting processes for developing a comprehensive Performance Measurement Baseline (PMB). This presentation will discuss an EVM implementation strategy with an emphasis on separating process from tool selection.

Without well defined management processes that support the development of your performance measurement baseline, your EVM software will miss the mark in providing the organization with realistic data that supports sound decision making.

The focus for this session will be an approach for EVM implementation that explores the processes that must be defined and cataloged in advance of EVM software selection. How the organization accounts for cost at the project level, track hours expended on work activities, and the policies for reporting billable versus non-billable hours should be well understood and consistent with industry standards.

In this session we will walk through a sound and pragmatic implementation approach that starts with targeted, just-in-time training and culminates with an implementation template to take back to your organization.

The session will be informative, practical, and organized in an easily understood format to benefit all participants.

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Mr. Counts is the founder and CEO of The Earned Value Group, Inc (EVG, Inc.). In this capacity, he is responsible for overseeing the delivery of Earned Value Management Training, Implementation, and Certification services to clients.

He has held the position of Business Analyst, Senior Consultant, Manager, Project Manager, and Program Manager at companies including PricewaterhouseCoopers and IBM.

Mr. Counts holds a Bachelor of Science degree in Management Information Systems from the University of South Florida, and an M.B.A. from Nova Southeastern University.

Mr. Counts is certified as both a Project Management Professional (PMP®) by the Project Management Institute (PMI®) and as an Earned Value Professional (EVP) by the Association for the Advancement of Cost Engineering International (AACEI).

PS 22 - Getting the Entire Team On-Board to EVM

Earned Value Management in itself is a pretty simple and logical approach for measuring progress. So why do program and project teams and organizations have such a difficult time doing it and why is there so much resistance from the team members? In CH2M HILL, the #1 Project Delivery Company in the world (ENR Magazine); 2006 PMI Project of the Year recipient, we have found that by providing an on-line interactive tool easily accessed and used by project team members. It provides instructions of what was to be done, how to do it and the forms to do it with thus eliminating the uncertainty solving this age-old problem. This interactive toll drives the standardization and compliance needed to produce performance information and get the team on-board and keep them engaged. This presentation shares the lessons learned and the on-line tool being used on small projects and mega programs such as the \$5.25B Panama Canal Expansion Program and the 2012 Olympics.

Gregg M. Hughes, CH2M HILL

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Gregg Hughes is the Director for Program Delivery Systems, for the international project delivery firm CH2M HILL. CH2M HILL has nearly 25,000 employees delivering Transportation, Environmental, Water/Waste Water, Nuclear, Energy and Construction projects around the world. Gregg has over 30 years in delivering projects. He spent his first 28 years in the United States Air Force flying and as a Major Program Manager serving 2 tours in the Pentagon Acquisition Office. His last assignment was as the Government Representative to the Boeing Company in Seattle Washington. Gregg has been with CH2M HILL for nearly 10 years as a project manager and client service representative. His current position has seen Gregg support Major Programs in Panama, England, UAE and the United States. Gregg has been active in PMI receiving his PMP in 1994 and actively working to improve performance management since his early days in the Pentagon and on his projects. Gregg has been a speaker and Track Leader at many of the PMI conferences speaking to implementing performance management as well as teaching at the Master's Degree level and PMP preparation courses. Gregg organized and lead the International EVM Symposium held in Seattle Washington in 1999.

PS 23 - Earned Value from E through V

“E through V” covers the value of Earned Value for the practical practitioner, avoiding details not needed for the running of the majority of projects. So often we forget the Pareto principal when thinking about performance measurement, not recognizing that the most value from Earned Value is derived from the key points. All too often we get caught up in details and calculations that need not be included in many projects; they have been added for methodological completeness.

With details and side notes extracted and updated from the popular “Earned Value Options and Alternatives,” the presentation incorporates metrics that can be applied to projects that enhance Earned Value. These additional metrics can be strong indicators of project progress and need not

necessarily be pre-established to be of value. In problem project scenarios, additional and alternative ways of determining progress can be valuable to determine project completion schedule, periodic progress, EAC, and related answers. The steps to creating practical Earned Value for projects are clearly laid out. Finally, project reporting examples are discussed showing all the various metrics and appropriate charts, graphs, and drill-downs for various situations.

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Charlie has over twenty years managing projects in IT, relocation, and construction. He has divided his consulting enterprise between commercial and defense industries, so knows earned value from both perspectives. In the 1980s he produced a Program/Functional Management system for an aerospace defense firm eventually utilized by almost all of its professional/technical performers.

Charlie created one of the first personal computing mapping software products in the early 1990s and has capitalized on its success to work projects for distribution firms, direct mail, banking and finance, who require address encoding and geocoding, and other industries. His diverse background makes for interesting discussions and knowledgeable response in many enterprises and pursuits.

PS 24 - Preparing for the Integrated Baseline Review (IBR)

The Integrated Baseline Review (IBR) is a critical step in setting a positive tone for a program. This session will prepare the Contractor's Program Manager and Control Account Managers (CAMs) for this important meeting. Geared towards companies that are new to Earned Value Management, this session will cover the Objectives and Focus of the IBR, Information the CAM Needs to Know, IBR Preparation Steps, IBR Lessons Learned, and sample questions the CAMs may encounter.

This session will include:

- Objectives and Focus of the Integrated Baseline Review (IBR)
- The Role of the Control Account Manager (CAM)
- The Information the CAM Needs to Know
 - Describe how you plan your Control Accounts
 - Describe how you manage your work
 - Describe how you manage risks
- IBR Preparation
 - Review the Program documentation
 - Program-Specific Training
 - Documentation that are reviewed before and during the IBR
 - CAM Notebooks
- IBR Lessons Learned
- Sample Questions for the CAM

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Kelly Meassick is co-founder of Charter Performance Management Group, a provider of EVMS implementation and Program Management consulting to government contractors and agencies. She has 20 years of project, program and executive management experience in the defense and federal government industries. She founded three successful businesses with core competencies in the areas of software development, security products, project management, and consulting.

Kelly's experience includes EVMS strategy development and implementation; business process re-engineering; compliance assessments; tool implementation; development of program management policies, procedures, guidelines and templates; and IBR support. She is a frequent speaker and trainer at national EVM and project management conferences. Kelly received her MBA from Auburn University and Bachelor's degree in Management Information Systems from the University of Alabama in Huntsville. She is a certified Project Management Professional.