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Karen Richey, Senior Cost Analyst, GAO Center for Technology and Engineering

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Catherine Ahye, PMP, Welkin Associates, National Geospatial-Intelligence Agency
Heather Chelson, National Geospatial-Intelligence Agency

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John D. Driessnack, PMP, CCE/A, Senior Director, Executive Consulting Group, MCR, LLC.
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Warren Nogaki, PMP, Air Force Space and Missile Center

PS 01 Alternate Approaches to Building an Independent Estimate at Completion (EAC) for an Underperforming ACAT I Program

The basis of this presentation focuses on preparing EACs for first-time programs (i.e. new ship class, new technical design, new war plane, etc.) that happen to experience significant cost and schedule overruns. It is very common for first-run designs to run into performance problems, especially if new technologies are being incorporated. In these cases, the contractors are less able to provide as accurate of an EAC because their newness and potential unfamiliarity with the work. These EACs may only focus on known variances to date as there is less confidence in predicting variances that have yet to be identified. In addition, traditional statistical EAC calculations are not as valuable because the amount of change and fluctuation that occurs on significantly underperforming new programs. Here the EAC requires close attention and frequent updates to stay valid. This presentation covers innovative approaches to developing EACs actually experienced on programs with severe cost and schedule overruns and includes the following topics:

EAC Basics – discusses basic statistical EAC methodology including Bottoms-up EACs, Independent EAC Process, CPI, TCPI

EAC Methodologies - discusses alternate approaches to developing EACs for significant overrunning programs including Modified Statistical Approaches, "Straight Line" Cost Plots, Handling Significant Schedule Slip, Comparison To Other Programs

EAC Updates / Inputs - discusses innovative approaches to compiling updates and inputs on EACs for significant overrunning programs including Update Frequency, Engaging Monitoring Organizations, Program Office Expectations

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Mr. Andersen has over 25 years of program management and project controls experience, specializing in Earned Value Management and CPM Scheduling. His current responsibilities include providing EVM and schedule support for multiple Naval Sea Systems Command (NAVSEA) programs. As an EVM Technical Manager, he has helped to establish earned value and scheduling processes, policies, and guidelines for major ACAT I NAVSEA programs. Also functioning as the point-of-contact (POC) for the Integrated Master Schedule (IMS), he has interfaced with industry contractors to ensure they are maintaining effective IMS processes. Mr. Andersen is a certified Project Management Professional (PMP) through Project Management Institute (PMI), holds a BS in Engineering from Polytechnic University of New York, and is the owner of several US patents.

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Mr. Nelson has over 12 years of program management experience, including Earned Value Management (EVM), financial accounting, personnel management, project controls, IT management, databases and reporting, networks, system selection and implementation, and requirements analysis. His current responsibilities include providing EVM and schedule support for multiple Naval Sea Systems Command (NAVSEA) programs. He provides insight into cost and schedule variances, data trends, program impacts, and proposed cost recovery plans. Mr. Nelson also functions as the POC for EAC analysis, interfacing with the Program Office, DCMA, and the contractor to ensure EAC integrity. Mr. Nelson holds an Accounting Degree from George Mason University and a Masters Degree in Information Science from George Washington University.

PS 02 Utilization of EVM metrics and data in the Development of Life Cycle Cost Estimates and 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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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)

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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.

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PS 03 Software Total Ownership Costs Development Is Only Part of the Equation

Software development is a costly, often schedule-driven activity, prone to compromises to meet schedule. Many of these compromises have far reaching impacts on the cost of software maintenance, total ownership costs and software sustainability. Maintenance itself is often treated as a level of effort activity where insufficient staff are asked to do too much and where a desired level of maintenance rigor is impossible to preserve. Unlike hardware, software doesn't wear out but with inadequate maintenance it just becomes functionally less useful and less reliable over time. This paper discusses maintenance productivity issues, maintenance metrics, methods of making the most appropriate tradeoffs during development keeping total ownership costs in mind, estimating total ownership costs so total ownership cost is managed rather than just arbitrary. SEER-SEM's maintenance model will also be discussed in terms of how it determines proper levels of effort and where software degrades if inadequate staff levels are applied to it. Block changes will also be addressed including how to estimate them and how they interact with other levels of effort maintenance.

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During his over three decades in the industry, Daniel D. Galorath has been solving a variety of management, costing, systems, and software problems for both information technology and embedded systems. He has performed all aspects of software development and software management. One of his strengths has been reorganizing troubled software projects,

assessing their progress applying methodology and plans for completion and estimated cost to complete. He has personally managed some of these projects to successful completion. He has created and implemented software management policies, and reorganized (as well as designed and managed) development projects. His company, Galorath Incorporated, has developed tools, methods, and training for software cost, schedule, risk analysis, and management decision support. He is one of the principal developers of the SEER-SEM™ software evaluation model. His teaching experience includes development and presentation of courses in Software Cost, Schedule, and Risk Analysis; Software Management; Software Engineering; and Weapons Systems Architecture. Mr. Galorath has lectured internationally. Among Mr. Galorath's published works are papers encompassing software cost modeling, testing theory, software life cycle error prediction and reduction, and software and systems requirements definition. Mr. Galorath was named winner of the 2001 International Society of Parametric Analysts (ISPA) Freiman Award, awarded to individuals who have made outstanding contributions to the theoretical or applied aspects of parametric modeling. Mr. Galorath's book "Software Sizing, Estimation, and Risk Management" was published March 2006.

PS 04 Program Level IBR/Surveillance in Federal Enterprise

Implementing EVM within Federal Agencies offers unique challenges that are not seen in the private sector. Civilian agencies have chosen a variety of methods to implement and report EVM. This presentation offers lessons learned to the unique challenges of implementing the 32 ANSI/EIA EVM guidelines within Federal civilian agencies on two major programs in which Federal Agency internal scope is larger than the prime contractor scope. The discussion will review lessons from implementation of EVMS that successfully passed Agency and GAO review, and will focus on the usefulness of a Program level IBR and System Surveillance. This session is for individuals who are implementing EVM within Federal civilian agencies or those who desire knowledge of some lessons learned while implementing EVM within Federal civilian agencies.

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Brian Evans is a Principal in MCR's Executive Consulting Group. The group is responsible for Integrated Program Management support across MCR. Mr. Evans is responsible for scheduling competency throughout MCR. He has over 20 years of Program and Project Management experience on a variety of Federal programs. During that time he has been involved in the planning, budgeting, and execution of a variety of major DOD Weapons System, Civilian IT, and Civilian construction programs. During his career, he has served a variety of roles including deputy program manager, project manager, program control chief, business analyst, scheduler, risk manager, and contract manager. He has worked on IT projects rated CMM Level 3 and CMMI Level 5. Mr. Evans has participated in a Program Assistant Visit for a major FAA IT Program.

His other experience includes being the lead for the implementation of EVM within an FAA organization, the deputy program manager for a NIH grants management system, the program control chief for an IRS data warehouse, the program control chief for a CMS financial accounting system, and a program management consultant for a major DOD weapons system program.

As a project management consultant, Mr. Evans has developed and implemented policies and plans for implementing a program level EVMS including the following guidance materials: Work Breakdown Structure, Scheduling, and Contract Clauses.

He has also spent time working for IBM Business Consulting Services; PricewaterhouseCoopers, LLP Management Consulting Services; Litton Industries; PRC, Inc. and Advanced Technology, Inc.

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Andrew Lovorn, a Senior Associate, of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered.

Mr. Lovorn is responsible for the integration and functionality of MCR's various Earned Value Management Systems. He has over 4 years of Program and Project Management experience on a variety of Federal programs. During that time he has been involved in the planning, budgeting, and execution of a variety of major DOD Weapons and Radar systems, Civilian spacecraft programs, and Civilian construction programs. During his career, he has served a variety of roles including lead scheduler, schedule risk expert, and lead EVM integrator.

His other experience includes being the lead for the implementation of EVM within an FAA organization, Lead Scheduler, Earned Value Analyst, and Schedule Risk Analysis Lead for a major DOD Radar Systems Program, and Schedule Risk Analysis Expert for a variety of Civil Programs within FAA and Jet Propulsion Labs.

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John Driessnack, the Senior Director of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. His efforts concentrate on improving integrated program management processes by linking cost, risk, earned value, schedule, and technical (CREST) quantitative information. As part of MCR Training Institute, John and his group provide both training and mentoring to Industry through conferences and directly to Customers and MCR Associates on the topics of Earned Value Management and Integrated Program Management to include Risk Management. Finally, the group captures the company's intellectual property by transforming the innovative thinking and solutions delivered companywide into documented processes that influence industry and government handbooks and policy.

John holds the title of lecturer at American University and lectures during executive courses at Defense Acquisition University (DAU) on Program Control. He recently co-chaired the NDIA PMSC's joint Industry/Government Risk Management Working Group. Prior to joining MCR, John had over 20 years experience in DoD leadership positions on various joint and Air Force programs, including GBS, V-22 Osprey, Air Borne Self-Protection Jammer. He holds a BS in Industrial Engineering from Pennsylvania State University, a Master of Science in Economics from Wright State University. John has completed all course work for a PhD in Economics from George Mason University and has several published papers on the subject of Earned Value Management, Program Control and Integrated Program Management.

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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 and EVMS implementation.

Prior to joining MCR, Pat had 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).

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.

Pat is a member of 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 05 Establishing Internal EVMS Surveillance

Earlier this year, the Defense Contract Management Agency (DCMA) released its Standard Surveillance Operating Manual (SSOM), which clearly highlights the importance of internal independent review of an organization's Earned Value Management System (EVMS), to also work in concert with the DCMA Surveillance team (called "Joint Surveillance"). Booz Allen Hamilton has successfully implemented an Internal EVMS Surveillance function to help its programs be prepared for Joint Surveillance Reviews (JSRs) and attempt to flesh out issues and problem areas early. This discussion will center around the lessons learned in setting up this internal function, and explore best practices in establishing the function, to include processes, procedures, and internal relationship-building.

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Lisa Matas is currently responsible for Earned Value Management System (EVMS) Surveillance for Booz Allen Hamilton, a leading global consulting firm that is committed to delivering results that endure. As the firm-wide EVM focal point, Lisa is responsible for ensuring that the Earned Value Management Control System Description (MCSD) and concomitant Standard Operating Procedures (SOPs) are in compliance with the latest ANSI/EIA-748A and related standards. Lisa is also responsible for ensuring, corporate-wide, that any and all contracts requiring EVM are maintained in compliance with the standards. Lisa establishes the corporate-wide processes for periodic surveillance visits which include hands-on review and analysis of Contract Performance Reports and other evidence of the value and effectiveness of the EVMS. Lisa represents the Firm and directly interfaces with the certifying agency representatives.

Lisa is a frequent speaker and trainer of Earned Value Project Management (EVPM) topics. She has served as a guest lecturer for graduate students at Bowie State University in Maryland, as well as volunteered her time to teach project management essentials for the organization Dress for Success. Prior to her tenure with Booz Allen, Lisa worked for such major defense contractors as Raytheon and Northrop Grumman. Lisa was also the EVM focal point at Thales

Communications, Inc., including the management of their Program Planning and Control group, responsible for policy and training development for all matters EVM.

Lisa has been certified by the AACEI as an Earned Value Professional (EVP) and by the PMI as a Project Management Professional (PMP).

PS 06 Preparing for EVMS Implementation: Assessing Your Organization's PM Processes and Culture

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.

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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. Candi holds a B.S. degree in Computer Science and is certified by the Project Management Institute as a Project Management Professional.

PS 07 Interfacing Earned Value Management and Risk Management Processes

Sound risk management process and robust earned value management application each offer the opportunity to improve project control and provide the project manager with reliable information on which to base proactive management decisions. All too often the disciplines are practiced in isolation and compete with each other for resource and project management attention, rather than recognising the advantages each has to offer and how best they can complement each other as part of a return to holistic project management. The 'Interfacing Earned Value Management and Risk Management Processes' session developed by Val Jonas & Lauren Bone deals with how to combine the two disciplines of Risk Management and Earned Value Management. The session continues to develop the themes presented in previous sessions.

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Val Jonas, CEO of Risk Decisions since 1998, is a well-known and respected risk management specialist. She advises clients and speaks at conferences on process, cultural and technical issues facing organizations implementing project, business and corporate risk management. She is a member of the Best Practice Review Group for the UK Office of Government Commerce's M_o_R guidance on risk management, a member of the PMI College of Performance Management Global Advisory Committee, on the Risk-EV working group, sponsored by the Association for Project Management (APM) EV Sig; the group has delivered a practical guide for interfacing Risk and Earned Value Management.

Val has played a major part in the design and development of the Predict! risk management toolset, working closely with key customers in the defense, aerospace, IT and energy sectors in the UK and overseas. She developed the Company's Risk Management Masterclass; delivering these at executive and senior levels within defense organizations, industry and government. Val has a joint honors BA in Mathematics and Computing from Oxford University.

Lauren Bone, Director, Bone Consulting Limited • +44.0.7766 974063 • lb@boneconsultingltd.com

Lauren Bone, B Eng (Mech), focus for the last 17 years has been the introduction and maturation of EVM in a variety of environments and organisations. Her experience includes work in Australia, Israel, UK, Germany, Italy and the US on government and commercial projects. These include the successful implementation of EV at a division of Israeli Aircraft Industries, the introduction, implementation and training of EV at Metronet, (charged with upgrade and maintenance of 2/3 of the London Undergrounds infrastructure) and standardised integrated project management for AgustaWestland. She has conducted a survey on the status of EVM Implementation within the UK MoD, and planned and hosted an activity to bring exposure of a mature EV environment to senior UK MOD personnel. Engagements have included Integrated EVMS System Design, Implementation Support, Training & Coaching and participation in EV project Reviews to various of the applicable world standards.

Operating as an independent consultant, Lauren is a foundation member and chair of the Global Advisory Committee of PMI-CPM, member of UK MOD DEVMIG (Defence EVM Interest Group) and UK APM EV-SIG. Her most recent efforts through these organisations has involved defining and promoting the integration of Risk and Earned Value and her current focus is on development, maintenance and promulgation of internationally accepted standards in the application of Earned Value.

PS 08 AT&L Trip Wire Integration into the DAU IPM Model

This symposium reviews the changes to the DAU 12 Step integrated program management (IPM) model required to incorporate the AT&L Trip Wire metrics. In 2002, the Defense Acquisition University created a 12 step IPM model for the Intermediate Earned Value Management Course (BCF-203). The model provides students with a sequential strategy for collecting and evaluating program cost, schedule, and technical performance data with the specific goal of teaching them how to use earned value to manage. In 2003, the model was updated to better represent risk management and systems engineering. During the summer of 2008, the model has undergone a significant revision to incorporate the AT&L Trip Wire metrics. Previously missing automated schedule health and metric tools have been added to the model. During the symposium, we'll begin by outlining the model and the 2008 changes. We'll finish by demonstrating where and how the AT&L Trip Wire metrics are integrated and computed by an analyst following the model.

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Dave Bachman is a retired military officer who has worked in industry and government. He is currently the Performance Learning Director for Earned Value Curriculum at the Defense Acquisition University (DAU) and the editor of the Acquisition Community Connection's Earned Value Management Community of Practice. His duties include knowledge management, curriculum development, acquisition research, and consulting. He recently managed the development of a new DAU scheduling course and EVMS validation and surveillance course.

His industry experience includes work as a Senior Program Analyst with Engineering Management Concepts, Inc., providing Earned Value Management support to the Missile Defense Agency.

Dave's military background includes extensive experience as a Navigator, Rated Staff Officer, JCS Intelligence Officer, and as a member of the Acquisition Corp. He started his acquisition career as an "Education with Industry" student at Hughes Aircraft Company. He was twice assigned to the GPS Joint Program Office, first as the project officer for the B-52 – GPS integration, and then as the Nuclear Detonation Detection System's Program Manager.

Dave completed his military career at the Defense Systems Management College in Fort Belvoir, Virginia, where he was the course manager for the Intermediate Earned Value Management Course. Dave has a Masters in Education from Marymount University, an MBA from Rutgers University, a BS in Ceramic Engineering from The Pennsylvania State University and he won the 2005 United States Distance Learning Association's silver award for excellence in teaching.

PS 09 A Non-linear Economic Forecasting Model for Government Executives

This paper uses the non-linear Rayleigh function to model the behavior underlying the problem-solving and engineering activities contained in research and development contracts and reflected in the cumulative cost accrual during the execution of those contracts. This paper examines 107 contract datasets. We show that on average the Rayleigh model explains over 93% of the variation in actual cost data. Further, in each of the datasets we estimate model parameters and from these derive usable independent estimates of the final cost at completion of the contract and the final contract duration. Then we employ the Rayleigh model progressively to predict final contract cost and duration by doing regression analyses of over 2500 information sets in these 107 contract datasets. We have validated that our implementation of the Rayleigh model outperforms all other common estimation techniques and provides very usable results very early in the life of the program. Armed with these results, we further develop a technique to use the Rayleigh model to assess plan realism before actual cost data have even been collected. We also compute confidence regions, which generate measures of overall contract cost and schedule risk at each prediction cycle. Finally we develop computational tools, which link economic and business insights to the trends of Rayleigh-generated estimates through the prediction cycles of a contract. This work has important economic implications for acquisition decision-making, contract execution, program management, and analyses of alternative offers and contract plans when programs are begun.

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Dan Davis is a research analyst and economist working with Gary Christle and Wayne Abba at the Center for Naval Analyses (CNA) on cost and acquisition issues and management studies. Dan has worked on studies of acquisition issues for the U.S. Air Force, the U.S. Navy, the U.S. Army, and the Department of Health and Human Services. A recent study for the Navy included the results of extensive research on ways of improving the analysis of existing earned value data to catch problems with projects early and to assist senior decision-makers in their oversight and management of major programs. Dan has also presented other work on the economics of subcontracting and procurement at the Western

Economics Association International conference in Seattle in July 2007.

Prior to joining CNA, Dan retired after twenty-two years of service in the U.S. Army. Upon retirement, he earned his Ph.D. in economics from the University of North Carolina at Chapel Hill. His dissertation used game theory, auction theory, mechanism design, and signaling theory to explore the bidding behavior of contractors and their use of subcontractors in government procurement. His work also explored the optimal mechanism design and the optimal reservation price for the government, when it acted as a surplus maximizer and when it acted as a social welfare maximizer. Dan is a graduate of the U.S. Military Academy at West Point, he is a Rhodes Scholar, and he has a master's degree from the University of Oxford at Oxford, England.

PS 10 Establishing a Change Management Capability for Improved Program Results

Large and small projects and programs always invoke change within organizations, yet few adequately address the inherent organizational conditions that work against program success. On average, programs with effective organizational change management capability integrated into the program management office and performance management initiatives are 71 percent more likely to meet or exceed program objectives and 55 percent more likely to meet or exceed the program schedule (2007 Prosci Benchmarking Report, Best Practices in Change Management). In this session, learn about the individual transition each stakeholder needs to make for changes to stick across the organization, and find out how to build in a PMO capability to mobilize your sponsor coalition, ready your change team, and assess and reduce program-related risk and readiness. Real-life examples demonstrate how managed change initiatives drive overall program performance and provide hard-learned lessons and the impacts when change initiatives fail.

Implementing an effective performance management system (e.g., based on ANSI 748) entails significant risk for many organizations because there are strong individual and organizational cultures, biases, and fears toward a management approach that can affect the very core of how work is managed. We will explore real-world approaches to implement performance management with an organizational change component.

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Paula Pierce, PMP, HCS, is the director of Human Capital and Organizational Change Management Practice at Robbins-Gioia LLC. Her 17-year career in performance improvement includes key human capital and organizational change roles in major government and commercial transformation initiatives. Paula is skilled at improving organizational performance by aligning people practices to deliver on organizational mission and strategic objectives. Her deep experience in human capital strategy, organizational change management, and project management provides a unique ability to translate strategy into action. Paula has published a number of papers on creating high-performance workplaces, including "Ten Actions Leaders Must Take to Engage Employees and Drive Organizational Performance" and "Get Smart About the Talent Crisis."

Keith Kerr, Robbins-Gioia, LLC • 703.739.5604 • fax 703.684.1669 • keith.kerr@robbinsgioia.com

Keith Kerr, PMP, is the managing director of Solutions at Robbins-Gioia, LLC. He is responsible for new solution product management, including market research, development, partner management, and sales strategies. He has overseen the development of Robbins-Gioia offerings such as the Capital Planning and Investment Control, Human Capital Management, Knowledge Management, Process Improvement, and Program Management solutions. Keith has more than 20 years of experience in helping organizations achieve a higher level of performance by applying program management rigor to their business processes. He has consulted for private sector, international, federal, and Department of Defense organizations. Keith has worked on a number of programs including weapon systems acquisition, information technology, depot maintenance, commercial business methodologies, and logistics/supply chain improvements.

PS 11 Responding to Government RFPs that Have EVMS Requirements

More and more government Requests for Proposals (RFPs) are requiring that bidding companies have an Earned Value Management System (EVMS) that complies with the ANSI/EIA-748 EVMS standard. However, in most cases, companies without an ANSI-compliant EVMS at the time of the bid are not prohibited from bidding. Kelly Meassick of Charter Performance Management Group will discuss the components of the EVMS Compliance Plan (needed to address the EVMS criteria of DoDI 5000.2) and the artifacts needed to support an EVMS-compliant proposal submission (i.e. WBS, OBS, RAM, IMP, IMS). Kelly will also share EVMS Implementation Lessons Learned from a variety of clients with differing company cultures, EVMS goals and customer expectations.

This session will include:

- Developing EVMS-Compliant Responses
- What needs to be done before the RFP is released
- How to respond to the DoDI 5000.2 requirement
- How to develop an EVMS-Compliant Response

Taking a Proactive Approach to EVMS Implementation
Lessons Learned
Keys to Success
How to get started
Set your own implementation pace

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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.

PS 12 EVM on Service Consultancy Practice

Many consultancy practices help large industry and Federal Agency program offices implement Earned Value Management, but don't practice the management technique on themselves. This presentation will review the efforts of the MCR Executive Consultancy Group in implementing EVM in a service organization that works across many customers, both industry and government and the unique challenges. This presentation outlines how the MCR Executive Consulting Group is set up an EVMS that covers the service scope across its various customers, including direct links to the EVMS it has developed for several Federal Agency programs. MCR is also in the process of updating its CMMI Level II and implementing it companywide. The synergies between CMMI and EVMS will be addressed. The presentation will outline the structure established to date and the lessons learned during the ongoing implementation. This session is for individuals who wish to implement EVM on a service organization that works within the Federal agencies or those who desire knowledge of some lessons learned while implementing EVM within Federal agencies support contractor arena.

John D. Driessnack, PMP, CCE/A, Senior Director, Executive Consulting Group, MCR, LLC
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John Driessnack, the Senior Director of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provide initial implementing management assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. Efforts concentrate on improving integrated program management processes by linking cost, risk, earned value, schedule, and technical (CREST) quantitative information. As part of MCR Training Institute, John and his group provide both training and mentoring to Industry through conferences and directly to Customers and MCR Associates. Finally, the group captures the company's intellectual property by transforming the innovative thinking and solutions delivered companywide into documented processes and influence industry and government handbooks and policy.

John holds the title of lecturer at American University, and lectures during executive courses at Defense Acquisition University (DAU) on Program Control. He recently co-chaired the NDIA PMSC's joint Industry/Government Risk Management Working Group. Prior to joining MCR, John had over 20 years experience in DoD leadership positions on various joint and Air Force programs, He holds a BS in Industrial Engineering from Pennsylvania University, a MS in Economics from Wright State University, and completed all course work for a PhD in Economics from George Mason University. He has several published papers.

PS 13 PMP and EVP Verification, Which One Is Right for You?

The Project Management Institute's Project Management Professional (PMP) and the Association for Advancement in Cost Engineering's Earned Value Professional (EVP) Certifications are two possible paths for individuals to distinguish themselves. Which one is right for you? In this presentation we will introduce both programs, discuss how they interrelate, examine the value of the certifications in the market place, review exam requirements, and discuss reference materials. Learn how to create a study plan, start a study group and what other resources, such as classroom and online training are available. We will pull it all together by looking at which sessions at the PMI-CPM conference can help prepare you for one or both of the certifications.

David Radkovich, Subsystem Technologies • Picatinny Arsenal, NJ • 973.724.4985

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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 14 Critical Path Analysis for Management Reporting

We've all learned the critical path method for scheduling. We've been to PM Bootcamp or Scheduling 101 and learned about forward passes, backward passes, and slack. And yet we've also struggled to answer the question "What is our critical path?" in a way that satisfies levels of management from the project manager up to the executive sponsor. The truth of the matter is that real schedules are complex, often consisting of 5,000 or more tasks. The critical path can be defined in multiple ways and consists of hundreds or even thousands of tasks. The nuances of scheduling software add to the challenge. In this presentation we'll explore an approach that bridges the gap between complex, detailed schedule data and the need to synthesize and communicate status to management stakeholders. Technical and analytical techniques are combined to focus project leaders' attention on mitigating the most pressing risks to progress along the critical path.

Joel Greenbaum, MITRE Corporation • 301.429.5367 • jgreenbaum@mitre.org

Joel Greenbaum is a Lead Information Systems Engineer at the Center for Enterprise Modernization at the MITRE Corporation. Early in his 13 years of project management experience, Joel began developing expertise in schedule management and scheduling tools. Joel has helped his peers and customers address critical questions about scheduling. He has given presentations on Monte Carlo analysis as well as the use of automation in performing schedule analysis.

Joel currently supports customers at the IRS and has also supported projects in a wide variety of private sector companies. In addition to schedule management, his expertise includes program management and strategy, and automating tools for project management. Joel has an M.B.A. in Information Systems Management from The George Washington University and is a certified Project Management Professional (PMP).

PS 15 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 you develop or improve your processes and tools, so that you can do useful analysis on your schedule. The steps to developing this system start with determining what information, or output, we need. All projects and customers are different. Next the process is developed. This includes how the data will be extracted, filtering the data to analyze, and when and how often to "run" the analysis. Finally the tools will be developed using MS Project and a bit of Excel. Tips, tricks and traps will be discussed. This presentation is a mix of theory and the practical. It would help to review Filters, Grouping, and Maps in MS Project. Those using schedule tools other than MS Project will also benefit, the fields analyzed are common to all scheduling tools such as variances, constraints, durations etc.

John Krahula, PM Metrics • johnmtnair@aol.com or info@pmmetrics.com

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 16 Managing IT Investments through Earned Value Management (EVM) and Account Code Restructure (ACR) Classification:

A Case Study at the US Patent & Trademark Office (USPTO)

In 2006, the Financial Systems Integrations Office (FSIO) within the General Services Administration (GSA) introduced a common government-wide accounting classification (CGAC) code structure to help standardize government reporting. Many federal agencies have already restructured their accounting codes to comply with the CGAC structure. In November 2006, the Office of Finance at the United States Patent & Trademark Office (USPTO) initiated the Account Code Restructure (ACR) project to streamline the current program code structure by achieving the following objectives: redefining the program code into a more meaningful structure consisting of Programs, Projects, and Activities (PPAs), improving the guidance on how to use codes and how to create new codes, reducing redundancy in existing codes, and introducing an additional sub-budget organization code field to capture spending information. The new PPA Accounts and the accompanying guidance provided more accurate and timely information for decision making needed by the senior management executives. The purpose of this presentation is threefold: 1) provide a brief overview of USPTO-wide ACR project as part of the overall strategic goal of becoming more cost-effective organization, 2) discuss how the Office of Chief Information Office (OCIO) at USPTO used the PPA code structure in managing their IT portfolio investments and execute flexible earned value management reporting and 3) explain how the PPA code structure linked to the current Software Development Life Cycle (SDLC) phases. The ACR project allows USPTO to create a better way of tracking financial cost information and comply with reporting requirements mandated by various federal mandates.

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Edward Logan is a Principal Consultant for the North American Public Sector (NPS) of Computer Sciences Corporation (CSC), a leading global consulting, systems integration and outsourcing company with more than 90,000 employees in 80 countries worldwide. He is currently working as a project manager under the U.S. Patent & Trademark Office (USPTO)/ Office of Chief Information Officer (OCIO)/System Development Integration (SDI) Program with approximately \$280 million contract value providing contractor support services such systems design, development, implementation, integration, maintenance, testing and training. Prior to joining CSC, he served as the Practice Manager Infrastructure Management for Project Performance Corporation (PPC) under the System Engineering Infrastructure Solutions Division with full P&L responsibility for daily operations with over \$10 million annual revenue and as a Deputy Program Manager responsible for managing over a \$50 million IT infrastructure network support contract. In addition, he also worked as a Senior Consultant for Robbins-Gioia, LLC and was responsible for program management and providing expert advice in the implementation of the Patent e-Gov Program, a multi-year \$285 million e-Government initiative that developed an electronic image and text-based patent application processing and workflow automation. He earned his bachelor degree at Northern Arizona University. He also completed master degrees at Robertson School of Government, Regent University and The George Washington University, School of Business. He recently completed the Senior Executive Strategic Management Program at Johnson School Cornell University and the Stanford Advanced Project Management Program. Mr. Logan is a certified business manager and project manager.

PS 17 CAM Notebook Design and Maintenance

The role of Control Account Managers (CAM) is to plan and monitor and control the project. CAMs are confronted with how best to track the organizing data, work authorizations, BOEs, budgets, schedules, performance data and changes for everyday monitoring and control as well as the Integrated Baseline Review (IBR). To ensure documentary evidence is available during the IBR, rapid access is a must. The problem is solved uniquely by every organization. This session will cover common and not so common approaches with regard to repository options, processes/procedures and quality control. The Q&A portion will elicit additional best practices from the participants.

Barbara Phillips, PMP, BAE Systems • 703.626.4752 • Barbara.phillips2@baesystems.com

Barbara Phillips is a senior management consultant with BAE Systems' Strategic Consulting Services. Barbara is responsible for designing and developing earned value management systems for internal and external customers. System development includes people, process and tools. She has more than 10 years experience training in project management. 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 earned value tool expertise in MS Project, Deltek Cobra and Deltek Wlnsight. \

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's current assignments are supporting two BAE Systems' programs. The Strategic Systems Program for the Department of the Navy for EVM certification in the Customer Solutions Operating Group. The Combat Systems Bradley program for schedule development and control in the Land & Armaments Operating Group.

Barbara is a PMP and has served on the PMI Washington, DC Board of Directors since 2004 and volunteered since 2001. She is a member of NDIA PMSC. She recently presented at the Deltek Insight Conference in Nashville (2008) on Deltek Wlnsight and at the PMI Leadership Management Institute in Atlanta (2007) on records management.

PS 18 User Adoption — Unlocking the Potential of an EVMS

User adoption of earned value management (EVM) processes and/or related toolsets is one of the major risk factors that need to be addressed to ensure the success of an earned value management system (EVMS). How do you measure user acceptance or even the effective use of a given process or toolset? What specific techniques, approaches, or actions can help make the difference? Whether you are implementing a new EVMS, refreshing an existing EVMS, or implementing new program management toolsets, user adoption factors will have an impact. If you are facing a user adoption challenge of your own or working on developing an approach for your organization, this presentation is designed with you in mind. This presentation will focus on proactive strategic and tactical actions that can be taken to enable an effective uptake of EVM processes as well as the toolsets that help the end users do their job. Discussion topics will include critical strategic components that help to ensure success as well as a selection of proven tactical approaches that can be tailored to fit the needs of a given organization. Key success factors will be highlighted as well as approaches for creating user focused repeatable processes and providing proactive user assistance.

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Joan is a subject matter expert in integrated cost/schedule earned value management systems (EVMS) with over 25 years of project management experience in information technology, aerospace and defense, and engineering and construction. She has an extensive background in implementing earned value management systems, developing and implementing project management software toolsets, business systems integration, developing earned value management processes and procedures, and creating project implementation guides and end user project management control system handbooks. She is also a specialist in technical communications. Joan is a widely recognized industry leader, author of, and expert in data interchange standards for project management cost and schedule data exchange (ANSI X12, UN/EDIFACT, UN/CEFACT). As the Chair of the NDIA PMSC XML Working Group, she spearheaded the effort to migrate the ANSI X12 schedule and cost transaction sets (806 and 839) to XML schema (UN/CEFACT international standards) that were approved and ratified in March, 2008.

PS 19 Implementing Program Level EVM in FAA on SBS

Implementing a program level EVM within Federal Aviation Administration offers unique organizational and technical challenges that are not usually seen in the private sector. This presentation outlines the system established and the implementation lessons learned from the multi-billion dollar Surveillance and Broadcast Service (SBS) program. The presentation will outline the translation of the FAA Joint Requirements Council Multi-Billion dollar business case risk adjusted based baseline to an EVM risk adjusted baseline in a COBRA databases reported in Wlnsight at the Control Account level reviewed at monthly program Performance Control Boards (PCB). The discussion will focus on the unique management challenges and technical intricacies of establishing a baseline in the FAA SBS program office capturing varying resources including numerous support contractors and interface to several other FAA programs. The interface and integration of ITT, the prime contractor, as a piece of the total picture will be discussed. The discussion will also address the programs successful passing of FAA and GAO reviews.

This session is for individuals who are challenged by an implementation of an EVM within Federal civilian agencies and those who desire knowledge of some lessons learned from a program level implementation.

John D. Driessnack, PMP, CCE/A, Senior Director, Executive Consulting Group, MCR, LLC

John Driessnack, the Senior Director of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. His efforts concentrate on improving integrated program management processes by linking cost, risk, earned value, schedule, and technical (CREST) quantitative information. As part of MCR Training Institute, John and his group provide both training and mentoring to Industry through conferences and directly to Customers and MCR Associates on the topics of Earned Value Management and Integrated Program Management to include Risk Management. Finally, the group captures the company's intellectual property by transforming the innovative thinking and solutions delivered companywide into documented processes that influence industry and government handbooks and policy.

John holds the title of lecturer at American University and lectures during executive courses at Defense Acquisition University (DAU) on Program Control. He recently co-chaired the NDIA PMSC's joint Industry/Government Risk Management Working Group. Prior to joining MCR, John had over 20 years experience in DoD leadership positions on various joint and Air Force programs, including GBS, V-22 Osprey, Air Borne Self-Protection Jammer. He holds a BS in

Industrial Engineering from Pennsylvania State University, a Master of Science in Economics from Wright State University. John has completed all course work for a PhD in Economics from George Mason University and has several published papers on the subject of Earned Value Management, Program Control and Integrated Program Management.

Mark A. Lorenz, ITT Corporation Program Manager • 703.668.6226 • mark.lorenz@itt.com

Mr. Lorenz is currently the ITT Deputy Program Manager for the Surveillance and Broadcast Services Program. In this capacity, he leads the program management office and the product assurance team in support of the program's technical activities. In particular, he is responsible for establishing and maintaining the Earned Value Management System supporting the SBS program.

Mr. Lorenz has been at ITT for the past 17 years. Over these years, he has led a number of ITT programs related to development of Global Navigation Satellite Systems (GNSS) supporting aircraft and satellite navigation. Recently, he completed development and implementation of a GPS augmentation system testbed for 6 member Economies in the Asia-Pacific Economic Cooperation to support their transition to apply GNSS to their regions.

Prior to working at ITT, Mr. Lorenz served in the U.S. Air Force as a Assistant Professor of Astronautics at the U.S. Air Force Academy and as a flight test engineer evaluating inertial navigation systems for the DoD inventory.

Mr. Lorenz received the Bachelor of Science degree in Engineering Sciences from the U.S. Air Force Academy, Master of Science in Navigation, Guidance, and Control System Engineering from the Air Force Institute of Technology, and Master of Science in Engineering Management from The George Washington University. He is a certified Six-Sigma Black Belt and a Program Management Professional with the Project Management Institute.

PS 20 FAA's EVMS Validation Review at ITT

As part of the OMB direction to implement EVM in civilian agencies, the Federal Aviation Administration developed a process to certify the EVMS of contractors who did not have a DCMA validated system. The FAA process was developed based on ANSI/EIA-748 guidelines using information contained in the NDIA Systems Acceptance Guide as well as the general DCMA validation process. The first application of this new process was a validation review of the ITT EVMS for the one of the FAA's major development programs. This presentation will provide an overview of the FAA's Acceptance Process for a contractor EVMS as well as the ITT efforts which resulted in a Validation Review held in September of this year.

**Keith A. Kratzert, Federal Aviation Administration EVM Focal Point • 202.385.8191
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Mr. Kratzert is serving as the Federal Aviation Administration (FAA) Earned Value Management (EVM) Focal Point. His office is within the Air Traffic Organization (ATO), Office of Acquisition and Business Services. He is responsible for introducing EVM concepts and processes to FAA acquisition projects and implementing EVM within the context of the FAA organizational structure. Prior to assuming the FAA EVM Focal Point position he held positions within the FAA in the ATO, Terminal Service Unit Planning and Performance organization and the Office of Communications, Navigation, and Surveillance Systems.

Before joining the FAA, he provided support to Navy and DoD acquisition programs support contractor. Prior to that he completed a 21-year career in the United States Air Force where he held numerous acquisition and test and evaluation positions in SAC and AFSC. He received a Level IV, Senior Acquisition Manager certification from the AFSC.

Mr. Kratzert has received the Bachelor of Science degree in Mechanical Engineering from Ohio University and the Master of Science in Public Administration from Troy State University. He is a member of the Project Management Institute's College of Performance Management.

Mark A. Lorenz, ITT Corporation Program Manager • 703.668.6226 • mark.lorenz@itt.com

Mr. Lorenz is currently the ITT Deputy Program Manager for the Surveillance and Broadcast Services Program. In this capacity, he leads the program management office and the product assurance team in support of the program's technical activities. In particular, he is responsible for establishing and maintaining the Earned Value Management System supporting the SBS program.

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Mr. Lorenz received the Bachelor of Science degree in Engineering Sciences from the U.S. Air Force Academy, Master of Science in Navigation, Guidance, and Control System Engineering from the Air Force Institute of Technology, and Master of Science in Engineering Management from The George Washington University. He is a certified Six-Sigma Black Belt and a Program Management Professional with the Project Management Institute.

PS 21 Portfolio/Program Performance Metrics (P3M)

Program performance is dependent not only on tight controls, but also on sound management that includes establishing and measuring against pre-defined program metrics. Program performance metrics should be used as an objective vs. subjective view and “early warning” system for program performance. Program performance metrics should measure baselines and track variances within a program. In addition, program performance metrics provide executive leadership with the ability to capture a portfolio view of an organization’s projects based on set criteria. Decisions regarding on-going cost, schedule, and technical performance of a program are more concrete as a result of having standard metrics across the enterprise.

This session will provide a practical approach to establishing program performance metrics and its application within the Federal Aviation Administration (FAA). The session is targeted to individuals who are responsible for managing programs; providing program metrics; evaluating programs; and making investment decisions. Program managers, prime contractors, support contractors, and government program support staff are encouraged to attend.

Daniel Milano, Federal Aviation Administration • 202.267.8450 • Daniel.Milano@faa.com

Daniel Milano is a Senior Advisor to the FAA Assistant Administrator for Information Services and Chief Information Officer. He is responsible for all aspects of IT capital planning; overseeing the development of the agency’s IT business cases and IT portfolio; implementing EVM and other program management best practices and processes; and representing the agency at the Department of Transportation in all areas of IT capital planning and investment control. Prior to his career at the FAA, Daniel was a Senior Financial Advisor to Air Force Assistant Secretary for Financial Management (SAF/FM). He advised SAF/FM on family housing and utilities privatization initiatives; aircraft and facilities leasing and conducted financial research in key areas such as aerospace company financial health. Prior to working for the US Air Force, Daniel was an operations research analyst with the Naval Center for Cost Analysis. He was the IT program manager for the Visibility and Management of Operating and Support Cost (VAMOSC) system. He also worked on various special studies for the Under Secretary of the Navy, the Vice Chief of Naval Operations, the Assistant Secretary of the Navy for Financial Management & Comptroller and the Assistant Secretary of the Navy for Research, Development & Acquisition. Mr. Milano previously worked as a mechanical engineer for the Naval Air Systems Command. He was responsible for the development of acquisition plans, including affordability assessments and long-range investment planning analyses, in support of Joint Strike Fighter and Aerial Target programs.

Tony Kulenek, FAA Finance

Mr. Kulenek’s experience spans more than 40 years in all aspects of program management, contract management, business and financial management, program planning and control, acquisition management, production management, and strategic planning. He has applied his knowledge and skills of these disciplines across a number of major DOD weapons systems and FAA air traffic control programs.

For more than 30 years Mr. Kulenek has worked in all aspects of Earned Value Management from the implementation of key processes and practices to preparing and evaluating cost and schedule control reports. Since 1984, he has provided support to the FAA as a program and financial analyst performing a program control function of managing the cost, schedule, and technical baselines of all major acquisition programs. His efforts entail the review and analysis of Program Status Reports, Financial data, Acquisition data, Budget Formulation data, Contractor performance data and Executive level investment decisions. The results are compared to the programs initial Acquisition baseline and performance reports submitted to FAA executives and Congressional committees.

PS 22 Establishing and Maintaining a Metrics-Based EVMS Surveillance Program

The proper establishment and maintenance of an ANSI-748 compliant EVMS is the critical first step toward OMB mandated project management and control. However, the process does not end there. Each subsequent year the EVMS is in operation, a formal surveillance of the system should be conducted. The cost of surveillance and the intrusion with management is many times an obstacle to effective surveillance. This brief will discuss how the FAA has developed and executed their metrics-based surveillance process that is comprehensive and cost effective without the typical surveillance interruption with management. . The presenters will provide real-world examples of their findings and recommendations for improvement. The discussion will address issues from both the individual project prospective as well as the identification of improvements that were made to the FAA’s systemic EVM process to include the results of the first EVMS surveillance, Lessons Learned and FAA senior management’s response to the results.

H. Giovanni Carnaroli, Federal Aviation Administration • 202.493.5184 Giovanni.carnaroli@faa.gov

H. Giovanni Carnaroli is the Program Director, IT Project and Portfolio Services in the FAA Office of the Chief Information Officer (CIO). In this position, he is responsible for all aspects of IT capital planning; overseeing the development of the agency’s IT business cases and IT portfolio; implementing Earned Value Management and other program management

best practices and processes; and representing the agency at the Department of Transportation in all areas of IT capital planning and investment control.

Mr. Carnaroli joined the Office of the CIO in 2002, as Chief Economist for IT, with responsibility for leading the agency's efforts to complete the IT systems' business cases, developing the annual Office of the CIO business plan, and implementing an agency-wide performance measurement system to track alignment with IT and overall FAA strategy. Prior to the Office of the CIO, Mr. Carnaroli was with the FAA's Office of Aviation Policy and Plans, where he was responsible for aircraft certification regulation. In addition to his career at the FAA, Mr. Carnaroli worked as an air transport management consultant.

Mr. Carnaroli is certified as a Project Management Professional by the Project Management Institute, and also completed the IT Project Management, CIO, Information Assurance and E-Government Leadership Certificate Programs at the National Defense University. Mr. Carnaroli graduated summa cum laude in agricultural economics from North Carolina State University, obtained a Master of Business Administration from the University of Maryland at College Park, and a Master of Arts in security management from The George Washington University.

Carla Nash, KM Systems Group • 301.455.0942 • CNash@kmsystemsgroup.com

Carla Nash, Project Management Professional Candidate, is a Project Manager with KM Systems Group with over 23 years of successful consulting in Project Management, Financial Management, financial system implementation, business process re-engineering, Earned Value Management (EVM), accounting disciplines and change management. Throughout her career, she has managed teams through all phases of the information systems development lifecycle with great emphasis on providing sound Project Management practices on each engagement.

Over the years, while building her Enterprise Resource Planning (ERP) systems experience and expertise, Ms. Nash was consistently devoted to helping clients manage their IT initiatives and projects by creating and maintaining project management systems and solutions for their Program Management Offices (PMO). As a contractor she has performed with significant impact, on Capital Planning and Investment Control projects with the Federal Aviation Administration, the Department of Homeland Security, the Internal Revenue Service, the Maryland Department of Transportation, and the Maryland Department of Human Services. Currently, she coaches clients on managing and utilizing EVM by providing EVMS assessments, EVM data analysis (including Exhibit 300 verification), and program level EVM Surveillance.

PS 23 GAO Review of FAA's EVMS Implementation

In fiscal year 2008, the Federal Aviation Administration (FAA) plans to spend over \$2 billion on IT investments—many of which support FAA's air traffic control modernization. To more effectively manage such investments, in 2005, the Office of Management and Budget required agencies to use earned value management (EVM). The U.S. Government Accountability Office (GAO)—which is responsible for assisting Congress in its oversight of the federal government, including agencies' stewardship of public funds—was asked by several House and Senate oversight committees to assess FAA's policies for implementing EVM on its IT investments, evaluate whether the agency is adequately using these techniques to manage key IT acquisitions, and assess the agency's efforts to oversee EVM compliance. To do so, GAO piloted its Cost Assessment Guide as an audit tool. In this joint presentation, we will discuss the GAO's methodology for the FAA audit and the detailed results of this review, as well as the FAA's observations on the audit process and its formal response to the GAO findings.

Carol R. Cha, U.S. Government Accountability Office • 202.512.4456 • chac@gao.gov

Carol Cha is a Senior Information Technology Specialist at the U.S. Government Accountability Office (GAO). During her tenure, she has led reviews in EVM and IT investment management at the Departments of Commerce, Defense, Homeland Security, and Treasury, among others. She also teaches beginning and advanced EVM training courses within GAO. Currently, she is working on the development of GAO's Cost Assessment Guide—which is intended, in part, to be an auditor's guide to estimating and managing program costs. She holds a B.S. in Business Information Technology from Virginia Tech.

Daniel Milano, Federal Aviation Administration • 202.267.8450 • Daniel.Milano@faa.com

Daniel Milano is a Senior Advisor to the FAA Assistant Administrator for Information Services and Chief Information Officer. He is responsible for all aspects of IT capital planning; overseeing the development of the agency's IT business cases and IT portfolio; implementing EVM and other program management best practices and processes; and representing the agency at the Department of Transportation in all areas of IT capital planning and investment control. Prior to his career at the FAA, Daniel was a Senior Financial Advisor to Air Force Assistant Secretary for Financial Management (SAF/FM). He advised SAF/FM on family housing and utilities privatization initiatives; aircraft and facilities leasing and conducted financial research in key areas such as aerospace company financial health. Prior to working for the US Air Force, Daniel was an operations research analyst with the Naval Center for Cost Analysis. He was the IT program manager for the Visibility and Management of Operating and Support Cost (VAMOSC) system. He also worked on various special studies for the Under Secretary of the Navy, the Vice Chief of Naval Operations, the Assistant Secretary of the Navy for Financial Management & Comptroller and the Assistant Secretary of the Navy for Research,

Development & Acquisition. Mr. Milano previously worked as a mechanical engineer for the Naval Air Systems Command. He was responsible for the development of acquisition plans, including affordability assessments and long-range investment planning analyses, in support of Joint Strike Fighter and Aerial Target programs.

PS 24 Panel Discussion — EVM Implementation at the FAA

This panel will discuss the issues faced by the Federal Aviation Administration in implementing the earned value management and other program and acquisition management improvements that have led to the FAA being considered one of the leading civilian agencies in this area. The panel members will offer their views from different perspectives and levels within and outside the agency - from the office pushing the initiative, to project managers and consultants and contractors affected by the effort. The panel will discuss what worked and what lessons they can share with other federal agencies and their contractors.

Robert B. Rovinsky, Federal Aviation Administration • 202.493.4019 • robert.rovinsky@faa.gov

Robert B. Rovinsky directs an office responsible for reviewing and improving all IT investment decisions within the office of the Chief Information Officer of the Federal Aviation Administration. His office reviews the capital investment business cases for all IT investments (over 2 billion dollars annually). He co-leads the implementation of earned value management in the FAA, and his office produces the FAA's IT strategy, conducts software and process engineering reviews of FAA programs, and is responsible for forms, privacy, directives and records management.

Prior to coming to the FAA in 1990, Dr. Rovinsky directed the Office of Research and Statistics for Fairfax County, Virginia, where he was responsible for all software systems used by the County and for the statistical and economic analyses used in County decision-making. From 1977-1987 Dr. Rovinsky was the Senior Information Manager and leader of an Operations Research Group within the US Department of Agriculture's Economic Research Service.

Dr. Rovinsky has consulted in the areas of information technology, statistics, and management in Egypt, Pakistan, Zimbabwe, Costa Rica, and Morocco, and has taught Operations Research, Engineering, and Statistics at several universities. He holds a doctoral degree in Operations Research and a Masters degree in Mathematics, both from Cornell University, and has published widely on the applications of Operations Research. He did his undergraduate work in mathematics at the University of Pennsylvania, and took graduate work at George Washington University in economics and managerial accounting. In Bob's spare time, he is a professional storyteller.

PS 25 NDIA Program Management Systems Committee and the Earned Value Management Systems Standard (ANSI-EIA 748)

Within the National Defense Industrial Association (NDIA), the Program Management Systems Committee (PMSC) provides the subject matter experts and administration of the Earned Value Management Systems (ANSI/EIA 748). The PMSC also develops and maintains interpretive guidance as well as other guidance which the framework and best practices for effective program management. OMB Circular A-11 Part 7, Supplement, The Capital Programming Guide, requires that agency's EVM processes should be consistent with the guidelines and processes in the National Defense Industrial Association (NDIA) EVMS Guides. These guides are routinely employed by many organizations in developing, implementing and managing the EVM processes. For others, the existence of the guides is new information. This track examines the guides and addresses the organization, relationships, purpose, key elements, and use as well as information on obtaining the guides. The track is for those who are working in program management and EVM especially in industries supporting the U.S. Federal Government.

Walter H. Berkey, Senior Manager, Earned Value Management, Lockheed Martin Corporation

Walt Berkey is the Manager responsible for Earned Value Management on the Program Assessment and Evaluation staff at Lockheed Martin Corporate Headquarters in Bethesda, MD. He is primarily responsible for the Corporation's EVM Policy (CPS-026) and the DCE Advance Agreement recognizing the Corporate Program Performance Management (EVM) Process compliance with ANSI/EIA 748. He also provides EVM leadership as the corporate representative to the Program Performance Management Council comprised of Planners, Program Finance, and EVM representatives from all business units.

Walt has been responsible for a wide range of Finance Management, Business Management, and EVM positions at IBM Federal Systems Manassas and IBM Group Headquarters that became part of Loral and subsequently Lockheed Martin. These responsibilities have included Contract Performance Measurement responsibility on both development and production contracts and Business Management responsibilities at the business unit level; Cost Accounting Standards compliance and Earned Value Management Process including performance and proposal tool capability at the IBM/Loral Group Headquarters; and a member of the Headquarters Management team responsible for Program Control Reviews and Performance Assessment Reviews conducted internally.

He is active in NDIA Program Management Systems Committee and the industry lead on the joint Government/Industry ANSI/EIA 748 Revision work team, industry lead in the development of the joint IBR Guide, the Application Guide, and

served as the past committee chair. He is also the NDIA representative on the GEIA Systems, Standards, and Technology Committee that includes being the earned value management system subject matter person for ANSI/EIA 748.

Dan Butler, Corporate Director, Earned Value Management, SAIC

Dan Butler is the Chairman of the National Defense Industrial Association (NDIA) Program Management Systems Committee (PMSC) and is also active in the Project Management Institute College of Performance Management (PMI-CPM). Dan is a member of the SAIC Corporate Program Execution Office, where he serves as the Director of Earned Value Management Systems (EVMS). Dan has more than 20 years of experience including a diverse background in Program Management and EVM, with experience in both the U.S. Government and commercial arenas. Dan has developed and maintained SAIC's Earned Value Management System (EVMS) and is responsible for all aspects of implementation, training, and surveillance. Prior to joining SAIC, Dan held numerous positions in Project Control Management and was Project Manager for several C4I programs for General Dynamics Space Systems and International Research Institute (INRI).

PS 26 NDIA EVMS Intent Guide

As a result of industry ownership responsibility for EV, NDIA developed what we have today: The ANSI/EIA-748, which defines framework and guidelines for Earned Value Management. Establishing an Industry Standards for EVMS was superior step forward. However, the criteria lack of direction on the documentation and process and with many new organizations using or being required to use EVMS and becoming validated, the need for a clear interpretation of the guidelines grew. The Federal Agencies, including the DOD teamed with NDIA to develop an approach to help all parties involved in the resolution of guidelines interpretation problems. The objective is to produce guidance to clarify and communicate the intent of the EVMS guideline.

Peter A. Wynne, Director of Program Finance for the Finance & Business Operations, Lockheed Martin Corporation Aeronautics Company • PO Box 748, Mail Zone 8601, Fort Worth, TX 76101-0748 • 817.935.5107 • peter.a.wynne@lmco.com

Mr. Wynne is currently the Director of Program Finance for the Finance & Business Operations area of Lockheed Martin Corporation's Aeronautics Company located in Fort Worth, Texas. Mr. Wynne joined the General Dynamics Fort Worth Division in 1979 and in 1981 became the Business Manager of the Electronics Manufacturing Center overseeing the estimating, negotiating, and performance management of the F-16 electronics manufacturing. He has performed jobs of increasing scope and responsibility in Military Electronics, Program Management, Estimating, and Business Management. During his tenure as the Business Director for the F-16 Program, Mr. Wynne led the successful implementation of the Manufacturing Resource Planning business model. In his current role Mr. Wynne led the consolidation of three sites earned value systems which included 12 primary Program areas into one Program Performance Management System and related system documentation. Mr. Wynne holds a B.A. in Finance: University of South Florida, M.B.A. (Business Management): University of Dallas.

Neil F. Albert, MCR LLC • 2010 Corporate Ridge, Ste 350, McLean, VA 22102 • 703. 506.4600 nalbert@mcri.com

Neil F. Albert is the President and CEO of MCR, LLC, a company specializing in management consulting, business analysis and forecasting, and information systems. Having served in numerous positions at MCR for over 20 years, Mr. Albert manages and performs cost/schedule analysis, acquisition management, and program assessment activities in support of the Federal government and industry clients. Prior to MCR, he was Director of Cost Estimating and Analysis at Textron Defense Systems where he was responsible for life cycle cost analysis, Design-to-Cost, economic analysis, and cost estimating and pricing for all programs. During his career, Mr. Albert has also provided cost, financial, and program management support to numerous organizations including the Department of Energy, Corps of Engineers, Department of Defense, Federal Aviation Administration, and NASA.

Mr. Albert has more than 30 years of professional experience. In 2003 he received the "Lifetime Achievement" award, the highest honor from the Society of Cost Estimating and Analysis (SCEA). He is a Certified Cost Analyst/Estimator (CCEA). He is a Past President of SCEA and the College of Performance Management (CPM). Mr. Albert also served as the Vice Chairman of the Aerospace and Defense (A&D) Special Interest Group (SIG) within the Project Management Institute (PMI). He is currently on the Executive Committee for the National Defense Industrial Association (NDIA) Program Management Systems Committee and the Industrial Committee for Program Management.

PS 27 NDIA EVMS Application Guide

The NDIA Application Guide is the Program Management Systems Committee's newest of five EVMS guides. It was published in March of 2007, as a working release for use and comment. OMB asked NDIA to prepare an introductory guide covering the entire process required to implement and manage EVM during all phases of the acquisition life cycle.

The goal was to help government agencies, private firms, and individuals new to EVM gain an overview of the EVM process before implementing the requirements in the other EVM guides. The session will discuss the contents of the guide and its application to federal acquisition programs.

David Muzio, MCR, LLC • 727.210.1454 • dmuzio@mcri.com or dlm773@verizon.net

David Muzio is currently a part-time employee of MCR, LLC, specializing in Business Case Development and implementation of Earned Value Management, with expertise in all aspects of Acquisition Management. Dave retired from the Federal Government in 2006 after 39 years of contracting and program management experience. His accomplishments include: (1) performance-based service contract concept development and implementation across the Federal Government; (2) program management and policy development of the government's outsourcing program defined in OMB Circular A-76; (3) major capital acquisition policy development defined in OMB Circular A-11, Part 7, and the Capital Programming Guide, including the requirements for the use of EVM on all major acquisition programs for both contractor and government development work; and (4) the Federal Acquisition Regulation policy on including EV in Contracts.

Dave has a B.S. in Business Administration from the University of California at Berkeley, and a MBA from Auburn University. He is a member and Fellow of the National Contract Management Association (NCMA), a member of the Project Management Institute, including CPM and the Risk SIG. He was presented with CPM's Driessnack Award in 2006. David L. Muzio is Procurement Policy Analyst (ret.), Office of Federal Procurement Policy, in the Office of Management and Budget. His responsibilities include: developing the requirements for the use of Earned Value Management Systems (EVMS) for major acquisitions, reviewing and scoring business cases for capital assets submitted with the agencies annual budget requests, and providing assistance and training to agencies and OMB Resource Management Offices to improve project management on specific projects. Additional responsibilities include developing the policy for the use of the Share-in-Savings method of procuring Information Technology projects, assisting with policy on management and use of Government Aircraft in civilian agencies, value engineering, and A&E and construction contracting. Mr. Muzio has thirty seven years of Federal acquisition experience at Air Force, NASA, Resolution Trust Corporation and OMB, covering all aspects of the process including installation purchasing, major systems acquisition and headquarters staff positions. Mr. Muzio is member of the National Contract Management Association, Washington Chapter and NCMA Fellow, and member of the Project Management Institute, Washington Chapter and the College of Performance Management. Mr. Muzio is the author of OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets, OMB's Capital Programming Guide, Office of Federal Procurement Policy's, Best Practices for Using Current and Past Performance .

PS 28 Panel Session: EVMS Validation Reciprocity in Civil Agencies

As EVM has become more institutionalized in both civil and defense agencies, organizations who support multiple agencies are faced with a validation requirement for each agency. While reciprocity has and will continue to be discussed, there is essentially no commonly recognized EVM validation recognition across all agencies, each of whom employs differing methodologies for validating an organization's EVMS. This panel will explore the issue of reciprocity from a civil agency perspective, including DOE, FAA, and others.

Moderator: David Treacy, DOI, FAA, DOE, NASA • david.treacy@att.net

Mr. Treacy has extensive experience in complex, research, development and acquisition projects. In his previous position he was a project manager within the Department of Energy (DOE), for large science facilities at Stanford Linear Accelerator Center and the Lawrence Livermore National Laboratory. Prior to DOE, David was with the Air Forces Space Systems Division in various acquisition positions including, Systems Engineering, Planning, Programming and Budgeting, Test and Evaluation, and Program Management. Between assignments in the Air Force, he worked for the NASA Space Shuttle Program and the National Reconnaissance Office as a project manager. He is a certified acquisition professional in the DOD Acquisition Corp and a member of the Project Management Institute. Mr. Treacy is currently assigned to the DOE Department policies and regulations for project management as well as developing the Department's Earned Value Management System program.

PS 29 Panel Session: Integrated Baseline Review approaches in Civil Agencies

As a result of the FAR clause requiring EVMS and IBRs on federal acquisition programs and projects, civil agencies have had to develop approaches to validating the Performance Measurement Baseline (PMB). Some agencies have developed their own framework, while others have tailored existing guidance or sister agency guidance. This panel will explore some civil agency approaches to conducting IBRs and their expectations for IBR results.

Moderator: David Treacy, DOI, FAA, DOE, NASA • david.treacy@att.net

Mr. Treacy has extensive experience in complex, research, development and acquisition projects. In his previous position

he was a project manager within the Department of Energy (DOE), for large science facilities at Stanford Linear Accelerator Center and the Lawrence Livermore National Laboratory. Prior to DOE, David was with the Air Forces Space Systems Division in various acquisition positions including, Systems Engineering, Planning, Programming and Budgeting, Test and Evaluation, and Program Management. Between assignments in the Air Force, he worked for the NASA Space Shuttle Program and the National Reconnaissance Office as a project manager. He is a certified acquisition professional in the DOD Acquisition Corp and a member of the Project Management Institute. Mr. Treacy is currently assigned to the DOE Department policies and regulations for project management as well as developing the Department's Earned Value Management System program.

PS 30 Panel: Surveillance Strategies in Industry

There are many strategies within an organization for ensuring that an EVMS, once validated, maintains its efficacy as a management system. While the NDIA PMSC has published the industry guidance, most organizations/companies have develop their own methodology that is integrated with the organization's business and management processes. This panel will explore approaches within several companies who have mature implementations of EVM.

Moderator: Walter H. Berkey, Senior Manager, Earned Value Management, Lockheed Martin Corporation

Walt Berkey is the Manager responsible for Earned Value Management on the Program Assessment and Evaluation staff at Lockheed Martin Corporate Headquarters in Bethesda, MD. He is primarily responsible for the Corporation's EVM Policy (CPS-026) and the DCE Advance Agreement recognizing the Corporate Program Performance Management (EVM) Process compliance with ANSI/EIA 748. He also provides EVM leadership as the corporate representative to the Program Performance Management Council comprised of Planners, Program Finance, and EVM representatives from all business units.

Walt has been responsible for a wide range of Finance Management, Business Management, and EVM positions at IBM Federal Systems Manassas and IBM Group Headquarters that became part of Loral and subsequently Lockheed Martin. These responsibilities have included Contract Performance Measurement responsibility on both development and production contracts and Business Management responsibilities at the business unit level; Cost Accounting Standards compliance and Earned Value Management Process including performance and proposal tool capability at the IBM/Loral Group Headquarters; and a member of the Headquarters Management team responsible for Program Control Reviews and Performance Assessment Reviews conducted internally.

He is active in NDIA Program Management Systems Committee and the industry lead on the joint Government/Industry ANSI/EIA 748 Revision work team, industry lead in the development of the joint IBR Guide, the Application Guide, and served as the past committee chair. He is also the NDIA representative on the GEIA Systems, Standards, and Technology Committee that includes being the earned value management system subject matter person for ANSI/EIA 748.

PS 31 Efforts to Improve Air Force Cost Analysis

Ms. Woods will provide an update on the status of steps the Air Force is taking to reduce cost overruns and restore credibility with OSD and Congress. Specifically, she will provide a status on the implementation of a new Air Force Policy Directive (65-5) which put specific emphasis on annual estimates updates which could support EVM analysis; creating new Air Force Cost Analysis Agency Operating Locations; increased cost estimating decision support to Air Force senior leadership; and personnel issues including more stringent qualification and certification standards. Success stories and lessons learned to-date will be presented. Ms. Woods will conclude with time for questions and answers.

Ranae P. Woods, Associate Deputy Assistant Secretary for Cost and Economics, Office of the Assistant Secretary of the Air Force for Financial Management and Comptroller • 703.697.5313 fax 703.693.6642 • Ranae.Woods@pentagon.af.mil

Ranae P. Woods, a member of the Senior Executive Service, is Associate Deputy Assistant Secretary for Cost and Economics, Office of the Assistant Secretary of the Air Force for Financial Management and Comptroller, Washington, D.C. Mrs. Woods is responsible for assisting the Deputy Assistant Secretary of the Air Force for Cost and Economics in directing and supervising Air Force cost, economic and business case analysis. She also assists in managing the activities of the Air Force Cost Analysis Agency and is Deputy Chair of the Air Force Cost Analysis Improvement Group.

Mrs. Woods began her career as a cost analyst and industrial engineer in the Navy Cost Analysis Intern Program for the Naval Center for Cost Analysis where she supported the development of cost estimates for a wide variety of Navy weapon systems. Since 1993, she has held a wide variety of cost analysis positions within the Air Force. Prior to her current position, Mrs. Woods was detailed from the Air Force Cost Analysis Agency to a career broadening position. She served as Deputy Chief of the Programming and Integration Division, Total Force Integration Directorate, Office of the Deputy Chief of Staff for Plans and Programs.

EDUCATION

1988 Bachelor of Science degree in Industrial Engineering, Pennsylvania State University, University Park
1995 Master of Business Administration, Virginia Polytechnic Institute and State University, Falls Church
2005 Master of Science degree in National Resource Strategy, Industrial College of the Armed Services, Fort Lesley
J. McNair, Washington, D.C.

AWARDS AND HONORS

Best Article of the Year in the Journal of Parametrics
Runner-up Acquisition Costing Civilian of the Year
Analysis and Evaluation Award, American Society of Military Comptrollers - Washington Chapter
Air Force Meritorious Civilian Service Awards

PROFESSIONAL CERTIFICATIONS

Acquisition Professional, Level III and Senior Acquisition Course

PS 32 GAO's Cost Assessment Guide Updates to the Exposure Draft and How It Links Cost Estimating and Earned Value Management Best Practices

The U.S. Government Accountability Office (GAO) is responsible for, among other things, assisting Congress in its oversight of the federal government, including agencies' stewardship of public funds. Legislators, government officials, and the public want to know whether government programs are achieving their goals and what their costs are. The capability to generate reliable program cost estimates is a critical function necessary to effectively use public funds and to support the Office of Management and Budget's (OMB) capital programming process. Without it, agencies are at risk of experiencing cost overruns, missed deadlines, and performance shortfalls — all of which are recurring problems that our program assessments too often reveal.

Our Cost Assessment Guide was developed in order to establish a consistent methodology based on best practices to be used across the federal government for the development and management of its program cost estimates. In particular, it provides a detailed link between cost estimating and earned value management (EVM)—which is especially critical for setting realistic program baselines and managing risk. By design, managers and auditors alike should find this Guide to be a useful manual as they assess (1) the credibility of a program's cost estimate for budget and decision-making purposes, and (2) the program's status using EVM.

In this presentation, we will discuss the updates to content of the Guide since the Exposure Draft was published. We will show how the Guide emphasizes the relationship between Cost Estimating and Earned Value Management and highlight case studies from previous audits which illustrate the best practices being discussed.

Karen Richey, Senior Cost Analyst, GAO Center for Technology and Engineering

Karen Richey is a senior cost analyst in GAO's Center for Technology and Engineering, where she is involved in performing cost analyses and technology audits on a wide range of systems. In the past few years, Karen has been responsible for championing the use of earned value management as an auditing tool at GAO. Certified by the National Defense University as a Chief Information Officer (CIO), Karen is also Level-III certified in the field of cost estimating and financial management. She has 18 years experience in the fields of cost estimating and technology auditing.

Before joining the GAO, Karen was a cost analyst for the Department of the Navy where she performed earned value management and developed independent cost estimates for major weapon and automated information systems. Karen holds a degree in Statistics and Mathematics from the University of South Carolina. In the last year, she has developed and delivered a two day training class for auditors on Cost Analysis and EVM as well as co-authoring articles in The INTOSAI IT Journal and the Navy Comptroller Magazine. Karen is also the principal author of the GAO Cost Assessment Guide.

Jennifer Echard, Senior Cost Analyst, GAO Center for Technology and Engineering

Jennifer Echard has been a senior cost analyst in GAO's Center for Technology and Engineering since 2002. At GAO she is involved in performing cost analyses and technology audits on a variety of programs spanning many different agencies. Before joining the GAO, Jennifer was a cost analyst for the Department of the Navy where she developed independent cost estimates for major weapon and automated information systems. Jennifer holds a degree in Mathematics from the University of Maryland. She has co-authored the GAO Cost Assessment Guide as well as articles in The INTOSAI IT Journal and the Navy Comptroller Magazine. Jennifer is also Level-III certified in the field of cost estimating and financial management. She has 19 years experience in the fields of cost estimating and technology auditing.

PS 33 Checks and Balances — Cost Estimating and EVM

Cost Estimating and Earned Value Management obviously meet when program offices develop Estimates At Complete (EACs). But it can be so much more than that. What about assessing program office discrete risks? What about cross-checking cost models? What about examining requirements complexity between what's been completed and what's left to do? Cost estimators and EVM analysts really do assess the same program baselines; they may just have different

lexicons, rules of thumb and modeling techniques. The more we all know of the others assessment toolkits, the better we can provide insight as to the current and future status of the program. This presentation will explore where these two disciplines meet and where they can be leveraged to provide benefit to both.

**Catherine Ahye, PMP, Welkin Associates, National Geospatial-Intelligence Agency • 703.735.2353
Catherine.A.Ahye.ctr@nga.mil**

Catherine has over twenty years combined experience in Earned Value Management and Project Management as a government and contractor employee. Her experience includes developing an Earned Value Management System that received DOD accreditation within thirteen months from contract award; developing and overseeing financial management systems; providing estimates at completion and validating and analyzing cost, schedule and management performance measurement data; teaching EVM courses as well as schedule management and analysis.

Catherine has a working background in all phases of the defense acquisition process from concept studies through development to production and deployment of both hardware and software systems. Currently she is providing performance management consulting services to the National Geospatial-Intelligence Agency (NGA) government program offices and developmental contractors. Catherine holds a Masters and BS Degrees in Business Administration and is DAWIA Level 3 in Business, Cost Estimating and Financial Management and also in Program Management.

**Heather Chelson, National Geospatial-Intelligence Agency • 703.735.2457
Heather.F.Chelson@nga.mil**

Heather Chelson is the Cost Estimating lead for the National Geospatial-Intelligence Agency. Her background in cost estimating and financial management has been primarily in support of the intelligence community through programs at TRW and TASC (both now Northrop Grumman) and as a government civilian. She has been key to developing the cost capabilities at NGA and is author of several papers including topics such as implementation of cost estimating risk, schedule achievability for software development, CAIV and target costing, and predicting CPI.

Heather has been a member of several intelligence community awarded teams and has received multiple NIMA/NGA Meritorious Unit Citation Awards, Director of Central Intelligence Meritorious Unit Citation Award, and NRO Director's Team Award for her work in the field of cost estimating and financial management. She holds a BA degree from the College of William and Mary in Mathematics and Economics and a MBA from George Mason University. She is also certified DAWIA Level 3 in Business, Cost Estimating and Financial Management and Level 2 in Program Management.

PS 34 OSD's Acquisition Data Initiatives

Cost and program analysts have always had trouble finding accurate historical data and research information when conducting analyses on weapon system programs. To oversee execution of major acquisition programs, there is the need for improved collection, transparency, and availability of key program data. At the same time, cost data collection using traditional methods has become costly and burdensome to our defense industry partners. This presentation will provide participants with a summary of OSD's systems approach to these problems. Discussion will include an overview of the ongoing initiatives within OSD to improve the status of weapon system cost and software resource data reporting in the U.S. Department of Defense (DoD).

Dr. Ronald Lile • 703.601.4875 • fax 703.604.1012 • ronald.lile@osd.mil

Ronald D. Lile is both the Director of the Defense Cost and Resource Center (DCARC) within the Office of the Secretary of Defense's for Program Analysis and Evaluation. He was named to this position in March 2003. In June 2008, he also took over responsibilities as the Executive Secretary of the Office of the Secretary of Defense's Cost Analysis Improvement Group (CAIG).

In his role as Director, Dr. Lile is the Principal Staff Assistant and advisor to the Chairman, CAIG for management of weapon system cost data for major defense acquisition programs and is leading the effort to improve contractor cost and resource data reporting. In this capacity, he works with both government and industry representatives to ensure accurate and timely cost reporting and to ensure availability of the data to authorized personnel. As the Executive Secretary, he advises the Chairman, CAIG on department acquisition policy.

PS 35 Linking Cost/Earned Value, Implications for Policy/Execution

The GAO Cost Assessment Guide, Best Practices for Estimating and Managing Program Costs, identifies "linking cost estimating and EVM analysis" as a best practice. This presentation addresses practical approaches to execute such linking across cost estimating, EVM and other quantitative knowledge areas, such as risk management. Implications for the policy and execution for organizations that wish to implement such best practices and link the traditional stove pipe activities is discussed with a review of current activities internal to MCR and within its customer base, both government and industry. MCRs methodology, Linked Control Account Analysis™ (LCAATM), is address as a practical example of a best practice implementation. This session is for individuals who wish to meet GAO expectations via the Best Practice guide.

John D. Driessnack, PMP, CCE/A, Senior Director, Executive Consulting Group, MCR, LLC

John Driessnack, the Senior Director of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. His efforts concentrate on improving integrated program management processes by linking cost, risk, earned value, schedule, and technical (CREST) quantitative information. As part of MCR Training Institute, John and his group provide both training and mentoring to Industry through conferences and directly to Customers and MCR Associates on the topics of Earned Value Management and Integrated Program Management to include Risk Management. Finally, the group captures the company's intellectual property by transforming the innovative thinking and solutions delivered companywide into documented processes that influence industry and government handbooks and policy.

John holds the title of lecturer at American University and lectures during executive courses at Defense Acquisition University (DAU) on Program Control. He recently co-chaired the NDIA PMSC's joint Industry/Government Risk Management Working Group. Prior to joining MCR, John had over 20 years experience in DoD leadership positions on various joint and Air Force programs, including GBS, V-22 Osprey, Air Borne Self-Protection Jammer. He holds a BS in Industrial Engineering from Pennsylvania State University, a Master of Science in Economics from Wright State University. John has completed all course work for a PhD in Economics from George Mason University and has several published papers on the subject of Earned Value Management, Program Control and Integrated Program Management.

Wendy Freeman, Principal, Executive Consulting Group, MCR, LLC.

Wendy Freeman, a Principal of the Executive Consulting Group, acts with her group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementation management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. Ms. Freeman has 19 years of experience as a Department of Defense (DoD) and Federal Agency cost estimator/analyst earned while leading various investment program activities including Business Case Analyses, Independent Cost Estimates, Life-Cycle Cost Estimates, Software Intensive Estimates, Return on Investment Analyses, Analysis of Alternatives and Proposal Selection Teams. She teaches several cost estimating courses for both MCR employees and clients and has developed Beginner and Advanced ACEIT courses.

Ms. Freeman is a key contributor to the Linked Control Account AnalysisTM, providing Subject Matter Expertise for program analysis and earned value management. Currently, Ms. Freeman is managing an Earned Value revitalization effort for AFSPC Space and Missile Center. She developed a process for the FAA Aviation Safety Office to size their information technology software development projects, developed a Business Case Analysis and provided program management support to the FAA Office of Aviation Safety. Ms. Freeman performed a Return on Investment analysis for USMC Autonomic Logistics program, led reviews of software cost estimates in support of Air Force Milestone decisions, developed software cost and schedule estimates for the C-130 Avionics Modernization Program Independent Cost Estimate, led the AFSPC Common Vertical Lift Support Program Analysis of Alternatives, developed acquisition cost and schedule estimates for the radar systems of the Cobra Judy Replacement program, developed cost estimates for a NASA Lunar Relay Satellite to support trade studies for the Exploration Communication and Navigation System, and provided acquisition subject matter expertise for the Component Acquisition Executive of Defense Information Systems Agency.

Ms. Freeman spent 12 years supporting the Air Force at Electronic Systems Center, Hanscom AFB, MA after earning a B.S. in Mathematics from North Carolina State University.

Peter Meisl, Principal, Executive Consulting Group, MCR, LLC.

Peter Meisl, a Principal of the Executive Consulting Group, acts with his group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered. Mr. Meisl has over twenty years of cost estimating, financial management, defense system acquisition, program assessment, project management, and affordability analysis experience. Mr. Meisl provides cost analysis support to DoD, DoT and DHS, along with numerous commercial clients.

Alexandra Campbell, Principal, Executive Consulting Group, MCR, LLC.

Alexandra Campbell, a Principal of the Executive Consulting Group, acts with her group as a change agent which generates applied research to enlighten critical thinking, thus enabling superior solutions delivered through effective consulting. Additionally, as the company's internal consultants, the group provides initial implementing management, assuring new capabilities are entrenched in customer's tool kit. The group focuses on executive customers and critical

decisions, incubating Integrated Program Management (IPM) critical thinking that result in solutions delivered.

Ms. Campbell has 20 years of Industry and DoD Earned Value and Financial Management experience. Ms. Campbell earned a B.A. in Economics at the University of California Los Angeles (UCLA) before beginning her career at Hughes Aircraft Company in El Segundo, CA. She provided Financial Management, Proposal Management and Earned Value Management expertise to Manufacturing, Engineering Laboratories and Contractor Program Offices on ACAT-1 Air Force and Navy programs. She also developed the contractor's system description and program instructions while serving in the Space and Communications Group's EVM organization.

She joined MCR, LLC in 1995 and has lead Financial Management efforts on several high profile programs at Space and Missile Systems Center (SMC) and Electronic Systems Center (ESC) including MILSTAR, AWACS, GATO, and the Defense Dissemination Program. Ms Campbell has also provided EVM training to government and commercial organizations throughout her career.

Ms. Campbell has delivered EVM and Financial Management presentations at previous IPM Conferences ("Enhanced Financial Management using EVM Data") and received her Government Financial Manager Certification (CGFM) in 1996.

PS 36 Proposal Estimates to Performance Plans

Competitive proposals must be structured with low costs in order to gain a contract award. These same low-cost awards are the low-budget projects that cost account managers are obliged to support. They are often subject to EVM performance measurement reporting which focus on overrunning and behind 'schedule' cost accounts. In response to an RFP, the proposal team will submit a detailed estimate from the control account level up. The proposal manager will ensure that the proposal will meet the technical/functional requirements at the most competitive cost and schedule that the project management team will endorse. However, the government customers often conduct negotiations that result in lower funding levels than were proposed. Thus the project can be expected to allocate fewer funds to cost account managers than were identified in the 'winning' award. Often, control account managers will be left in a quandary, wondering how they should plan the jobs they will be committing to when the resources they are being asked to work to are less than they had submitted in the original estimate. Signing up to a job that has very limited budget gives many CAMS pause. Some might even consider avoiding the opportunity. We will take you through this process of planning for scarce resource tasks. We will show how the original estimate and the subsequently negotiated costs can include the identification of schedule and cost risks. We will look at a project using these bottoms-up estimates to develop their work plans and show how CAMs can monitor performance against plans using the risk management process to get support for assignment of management reserves in a timely fashion. From the perspective of the account manager we will identify what can be included in the cost account plans to help identify, assess, document, and then monitor the risks in the CAMs plan.

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Warren is a cost analyst with the Space and Missile Center (SMC) Comptroller's Cost Division (FMC). He is assigned as a lead cost analyst for satellite and ground system programs and is responsible for developing independent cost estimates for a wide range of programs.

Prior to the SMC assignment he worked at a NASA Center as a program and project planner and member of the technical staff. Work assignments included instructing control account managers and subsystem managers on developing and publishing control accounts work plans. In addition he was a manager for project scheduling and cost on a large (\$1B+) DoD contract for command and control systems. Later, he twice led project system and subsystem managers in the development of a networked project schedule used to baseline project schedule and plans. He also developed a risk management plan and used it as the project risk engineer to manage the project risk process. Earlier in his career, he served on active duty in the Air Force and was assigned to SAMSO (SMC's predecessor organization) as Launch and Control Systems Program Office's Project Management Systems Division Chief. He was responsible for implementing integrated cost and schedule reporting for major contracts and applying requirements for the use of network schedule analyses on contract efforts. Warren has been an instructor for the project management certificate program at UC Irvine's University Extension Program and has taught Cost Management, Procurement Management and Control and Monitoring courses during the last 9 years in both classroom and on-line forms.