

# PMI-CPM Professional Education Program (PEP) Seminars

**VP Education & Certification: Joe Houser**

## **CPM 100 Principles of Project Management — Special Topics**

**Course Coordinators: Mark Buchholz & Glen Phillips**

**CPM 100-A Integration, Scope, Time, and Cost Management**  
Glen Phillips

**CPM 100-B Overview of PMI® EVM Practice Standard**  
John Singley

**CPM 100-C Integration, Scope, Time and Cost Management**  
Glen Phillips

**CPM 100-D Human Resources & Communications  
Management and Professional Responsibility**  
Jack Kersbergen

**CPM 100-E Risk and Procurement Management**  
Mark Buchholz

**CPM 100-F (1) Case Study — EVMS Surveillance**  
Robert Loop and Donna Holden

**CPM 100-F (2) Case Study — Capital Asset Plan and  
Business Case (OMB Exhibit 300)**  
David Muzio

## **CPM 200 Principles of Schedule Management**

**Course Coordinator: Sue Robinson**

**CPM 200-A Critical Path Method Scheduling**  
Harry Sparrow

**CPM 200-B Introduction to Resource Loading / Analysis Techniques**

Harry Sparrow

**CPM 200-C Schedule Status Updates and Analysis Techniques**

Sue Robinson

**CPM 200-D Cost and Schedule Performance Measurement**

Frank Anbari

**CPM 200-E Schedule Analysis Techniques/Intro to Schedule Risk**

Walt Majerowicz

**CPM 200-F Basic Approach to Cost and Schedule Risk Analysis**

Walt Majerowicz and Dorothy Tiffany

**CPM 300 Principles of Earned Value Management**

Course Coordinator: Jack Kersbergen

**CPM 300-A EVM Principles and Terminology (Part 1)**

Eleanor Haupt and Susan Wood

**CPM 300-B EVM Principles and Terminology (Part 2)**

Eleanor Haupt and Susan Wood

**CPM 300-C Control System Design (Part 1)**

Tony Finefield

**CPM 300-D Control System Design (Part 2)**

Tony Finefield

**CPM 300-E Establishing an Earned Value Management System (Part 1)**

Lloyd Carter

**CPM 300-F Establishing an Earned Value Management System (Part 2)**

Lloyd Carter

**CPM 400 Principles of Earned Value Metrics & Analysis**

Course Coordinator: Keith Kratzert

**CPM 400-A Developing and Maintaining the PMB (Part 1)**

Gary Humphreys and Doug Fisher

**CPM 400-B Developing and Maintaining the PMB (Part 2)**

Gary Humphreys and Doug Fisher

**CPM 400-C Understanding Resource Management through EVM**

Wayne Abba

**CPM 400-D Integrated Baseline Review**

Eleanor Haupt and Susan Wood

**CPM 400-E Earned Value Data Analysis Techniques (Part 1)**

Gary Humphreys and Doug Fisher

**CPM 400-F Earned Value Data Analysis Techniques (Part 2)**

Gary Humphreys and Doug Fisher

**CPM 500 Principles of Technical Management**

**Course Coordinators: David Treacy and Bill Altman**

**CPM 500-A Development of the WBS**

Neil Albert

**CPM 500-B Technical Risk Management**

John Driessnack

**CPM 500-C Integrating Systems Engineering with EVM (Part 1)**

Patrick Barker

**CPM 500-D Integrating Systems Engineering with EVM (Part 2)**

Patrick Barker

**CPM 500-E Material and Subcontract Issues in EVMS**

Jim Wrisley

**CPM 500-F Technical Performance Measures**

Dennis White

**CPM 600 Principles of Project Integration**

**Course Coordinators: Kevin Martin**

**CPM 600-A Integrating the Project's Technical Components**

Bill Smart

**CPM 600-B Integrating Scheduling and EVM Metrics**

Kevin Martin

**CPM 600-C IMP/IMS as part of EVM**

Dennis White

**CPM 600-D Integrating Risk into PMB Development**

John Driessnack and Gay Infanti

**CPM 600-E Project Integration: Buyer's Perspective (Case Study)**

Dan Milano

**CPM 600-F Project Integration: Seller's Perspective (Case Study)**

Joe Houser

**Introduction**

The Training Seminars offered at this conference are part of the Professional Education Program (PEP) of the PMI College of Performance Management (PMI-CPM). Attendees may take any of the Training Seminars they wish to take without registering to participate in the PEP. Participants in the PEP, however, are afforded additional benefits, including achievement testing and certificates. Registration forms are available at the conference registration desk.

Two kinds of achievement certificates are awarded in the PEP: Course Certificates and a Graduate Certificate. Course Certificates are awarded to registered PEP participants who successfully complete Course Testing. A Course Test and a Course Certificate is offered for each of the six Core Courses (each consisting of six Course Lessons):

CPM-100	Principles of Project Management–Special Topics
CPM-200	Principles of Schedule Management
CPM-300	Principles of Earned Value Management
CPM-400	Principles of Earned Value Metrics and Analysis
CPM-500	Principles of Technical Management
CPM-600	Principles of Project Integration

A Graduate Certificate is available to registered PEP participants who earn each of the Course Certificates and satisfy the requirements for one of the two Graduate Electives:

CPM-700	Attendance at Eight Practice Symposia
CPM-710	A Research Paper on an Approved Topic with a target of 30 pages.

Practice Symposia are part of the afternoon program at the conference and do not conflict with the morning Training Seminars. Forms for documenting Symposia attendance for CPM-700 are available at the conference registration desk, as is additional information on the second Graduate Elective, CPM-710.

Course Testing is based on the same learning objectives that determine the content of the six Core Courses. Registered PEP participants may take a Course Test without taking the Course Lessons if they are confident that they have acquired the requisite knowledge by another means (training, self-study, experience or the like). Course Testing for Course Certificates is available in the afternoon immediately following the conference. Please see the conference schedule for the time and place of the Course Testing. Registered PEP participants will be notified of the particulars of online testing when they are available.

Course Lessons are delivered by volunteer trainers. Their Course Lesson materials are based on learning objectives developed by PEP volunteers (often including the trainers), with coordination provided by the PMI-CPM Vice President for Education and Certification. These materials are the property of the trainers or their employers and rights to their use are not granted to conference attendees or registered PEP participants without permission.

## Core Course Summary

**CPM-100 Principles of Project Management — Special Topics** — The Principles of Project Management course presents the general framework of project management. Organized around the PMI's A Guide To The Project Management Body of Knowledge (PMBOK® Guide), this course contains 6 lessons covering topics in Integration, Scope, Time, Cost, and Quality Management, PMI® EVM Practice Standard, human resources management, communications management, risk management, procurement management, and professional responsibility. The course also includes an overview of capital asset plan and business case, and EVMS surveillance.

**CPM-200: Principles of Schedule Management** – The Principles of Schedule Management course covers scheduling theory, terms, and analysis techniques. The six lessons cover topics like; Gantt charts, milestone charts, tiered schedules, schedule development, critical path scheduling, schedule analysis techniques, schedule risk assessment, and enterprise wide scheduling.

**CPM-300: Principles of Earned Value Management** – This intermediate level course introduces participants to the principles of earned value (EV) management. It is designed for individuals who have one or more years of general project management experience or who have completed CPM-100 and CPM-200 courses. Topics covered in this course include: EVM principles and terminology, EV data interpretation, project control system design, development and maintenance of the performance measurement baseline, and the use of EV data for cost and schedule performance management.

**CPM-400: Principles of Earned Value Metrics and Analysis** – This intermediate level course is designed for participants with one or more years experience in an EV project management environment. The course introduces the participant to more advanced EV measurement methods and analytical techniques. The course topics include; developing and maintaining the baseline, EV data analysis techniques, calculating estimates at completion, advanced EV management analysis, and managing funds using EV information.

**CPM-500: Principles of Technical Management** – This advanced course assumes the participant has sufficient academic or practical preparation to appreciate the basic technical management practices encountered in projects. Course topics include; development of Work Breakdown Structures (WBS), systems engineering on projects, use of Integrated Project Teams (IPTs), technical performance measurement, risk management, and quality management.

**CPM-600: Principles of Project Integration** – The Principles of Project Integration course is the “capstone” course for the series. Using lecture, case study and group exercises, this course integrates and reinforces principles taught in the other courses. Course topics include: project integration, master schedules and planning, integrating schedules and EVM metrics, and using risk to establish baselines.

## Detailed Course & Lesson Descriptions

**CPM-100: Principles of Project Management–Special Topics** — This course is based on the Project Management Institute’s (PMI®), A Guide to The Project Management Body of Knowledge (PMBOK® Guide). The course addresses nine categories of the PMBOK® Guide to include: (1) Project Integration, (2) Scope Management, (3) Time Management, (4) Cost Management, (5) Quality Management, (6) Human Resource Management, (7) Communications Management, (8) Risk Management, and (9) Procurement Management. Special attention is given to explaining the relevancy of each category to the project control professional including PMI® EVM Practice Standard, capital asset plan and business case development, EVMS surveillance, and professional responsibility. The course provides participants with an excellent framework for the rest of the CPM Program of Instruction. For those interested in certification as a PMI® Project Management Professional (PMP®), this course will provide an important grounding in the nine knowledge areas of the PMBOK® Guide. For those pursuing PMP® certification, it is also recommended that a PMP® certification preparation course be taken subsequent to CPM-100.

**Lesson A/C: Integration, Scope & Quality Management** — This lesson defines basic project management principles and introduces the participant to the Project Management Institute’s (PMI®) A Guide To The Project Management Body of Knowledge (PMBOK® Guide). Project integration is essential to project management. This lesson will define and discuss the key components of project integration and how project management knowledge areas overlap and interact throughout the life of a project. Defining a project’s scope and managing the changes to the scope are essential to a successful project. This lesson will discuss the critical techniques used to manage project scope. Quality management focuses on managing quality requirements on the project. The student will

understand the differences between quality planning, quality assurance, and quality control.

**Lesson B: Overview of PMI® EVM Practice Standard** — This lesson provides an insightful review of the EVM Practice Standard published by PMI® in 2005. The lesson highlights the main issues addressed in this important standard and provides examples of relevant applications. This training seminar has two objectives. The first is to provide a general overview of the PMI Practice Standard for Earned Value Management: the medium, the audience, and the message. The second objective is to provide an introduction to the essential fundamentals of earned value management: what it is, how it's done, and why it's a very important part of project management. You should attend this training seminar if you are interested in obtaining a basic introduction to the fundamentals of earned value management and/or you are interested in learning about the Practice Standard.

**Lesson D: Human Resources and Communications Management, and Professional Responsibility** — This lesson focuses on three more very important areas of project management: Human Resources management, Communications management, and Professional Responsibility/ethics. While sometimes not seen as core project management activities, these areas like the others are critical to a successful project. Having a commanding technical understanding of the technical aspects of a given project without the ability to manage interpersonal relationships is often a recipe for disaster. The project manager depends on his/her ability to work with a team of people to accomplish the project's objectives. Selecting the right people and understanding how to use the team within the larger organizational context is very important to success. Another critical area is that of managing the flow of information among stakeholders of a project. This lesson will introduce the participant to a variety of issues ranging from communications planning to administrative close out of the project. Considerations of professional responsibility issues to be observed by project managers are also addressed in this lesson.

**Lesson E: Risk, Procurement, Time and Cost Management** — This lesson will give the student an overview of risk management methodologies. In this lesson we will cover risk identification, risk quantification, risk mitigation, and the process of risk planning, and monitoring. This lesson will present several basic practices which can be used to incorporate risk management into daily project management activities. This lesson will also enable students to identify procurement management as well as some fundamental approaches to managing it throughout the life cycle of a project by integrating procurement management into earned value methods and techniques. This lesson will also review several types of scheduling techniques used to manage projects. Finally, this lesson will introduce basic cost management concepts. A more detailed treatment of these topics will be provided later in the POI.

**Lesson F (1): Earned Value Management System Surveillance** — Earned Value Surveillance is an essential component of a company's implementation of EVMS. The goal of surveillance is to demonstrate continued compliance with the ANSI/EIA 748 EVMS guidelines. Effective surveillance benefits any company implementing EVMS internally. The project management team makes decisions based on EVM results, therefore the validity of the reported information is essential. In 2004 the National Defense Industrial Association (NDIA) Program Management Systems Committee (PMSC) Surveillance Guide published in 2004 a guide to the surveillance process. That guide incorporated many successful EVM best practices and provided a number of warnings about risks to EVMS surveillance. This lesson trains the participant in these best practices and lessons learned.

Lesson F (2): **Capital Asset Plan and Business Case** — This lesson focuses on a very important area of project management, the development of a business case. The lesson is based on the requirements of the US Office of Management and Budget (OMB) Exhibit 300 and is applicable in many capital project environments. OMB Circular A-11, Part 7, *Planning, Budgeting, Acquisition and Management of Capital Assets*, requires Federal Departments and Agencies to submit to OMB as part of the budget process a summary Business Case for all major acquisitions. This summary business case should include sufficient information to help ensure that OMB has confidence that a full business case as defined in the Capital Programming Guide has been developed and approved in the Department or Agency. This training session will discuss the weak areas on the Exhibit 300 and the additional information that should be readily available from the full business case to achieve an excellent rating on the Exhibit 300.

**CPM-200: Principles of Schedule Management** — This course introduces the participant to the principles of schedule management in support of the project control function. Special emphasis is given to the schedule - EVM interface. The course begins with an introduction to scheduling and resource loading and analysis techniques that may be used in a variety of applications. This course teaches the participant how to recognize, develop, status, and analyze a variety of schedules. The course will discuss completion time forecasting and correlating the schedule variance with what the formal scheduling system is reflecting. It will provide perspective and context for quantifying and analyzing schedule risk. Since every project has cost, schedule, and technical risk that are interrelated, this course will prepare the participant to manage schedule risk.

Lesson A: **Critical Path Method Scheduling** — This Lesson reviews the basics of critical path method scheduling. The process that all project scheduling software packages use to calculate the critical path is reviewed. Part of this process is to perform forward and then a backward pass. The objective is to show how all of these network calculations are performed so that when the participants are reviewing the schedules generated by scheduling software packages, they will understand how to interpret it.

Lesson B: **Introduction to Resource Loading / Analysis Techniques** — This lesson focuses on the importance of careful planning and management of multiple projects. The lesson explores why success by today's standards require an organization to go beyond well managed individual programs to manage an assemblage of programs and projects as though they were one enterprise. Enterprise-wide project scheduling and resource planning requires the solution of a number of challenges that are not apparent to the individual project planner. Consequently, this lesson presents strategies for meeting these challenges, supporting the balancing act with a range of processes and techniques based on the organization's project management maturity level, and corporate planning culture.

Lesson C: **Schedule Status Updates and Analysis Techniques** — Schedule traceability is consistently between schedule dates, status and revisions. Horizontal and vertical schedule traceability will be discussed with emphasis on schedule/cost integration. Schedule status and impact analysis are a routine on-going activity during the life of a program. Performing schedule variance analysis that includes explanations for late starts/finishes, analysis of impacts to future tasks, impacts to the critical path provides insight and value throughout the contract performance will be discussed. The use of schedule diagnostics is an approach to support scheduling organizations to produce valid logically linked networked schedules. Their use is a technique that tests the schedule database for anomalies that could invalidate the accuracy of the schedule. Examples will

be given. When unrecoverable slippage in the schedule occurs, a recovery/work around plan is developed. Various approaches to reducing impacts to the critical path will be discussed including the use of 'Schedule Margin'. To gain insight on the health of a schedule, the combination of EV data and the schedule will identify areas that need additional analysis to avoid future schedule impacts. Combining control account metrics and schedule trends provide insight not previously available. The combination of SPI and total float identify will be discussed.

**Lesson D: Earned Valued Schedule Performance vs. Time Based Schedule Assessments** — This Lesson focuses on showing how to correlate the schedule variance with what the formal scheduling system is reflecting. The lesson addresses completion time forecasting and the concept of earned schedule and their use in forecasting schedule performance. It presents graphical techniques and their support of visualizing cost and schedule performance. It discusses various views of the time estimate at completion and their relationship to preventive actions and corrective decisions.

**Lesson E: Schedule Analysis Techniques** — Developing a baseline schedule, measuring performance against it, and estimating when remaining activities will start and/or finish are essential elements of good schedule management. Equally important is the meaningful analysis of project schedules that provides the project team with a rational basis for decision making in order to meet project objectives. Schedule analysis is the process of assessing the magnitude, impact and significance of actual and forecast variations to the baseline schedule and/or current operating schedule. It begins with the calculation of the project's critical path and determination of any change in the completion date of the project. Schedule analysis also includes diagnosing the health of the project schedule and its direction by examining elements including schedule accuracy, integration, realism, performance, variances, trends, forecasts, "what-ifs," risk and relationship to resources. This lesson will highlight and illustrate some basic schedule analysis techniques that can help project teams better assess their project's schedule position and augment the performance and variance information provided from Earned Value Management systems. It would be especially useful for Project Schedulers/Analysts who perform schedule analysis for their project teams.

**Lesson F: Basic Approach to Cost and Schedule Risk Analysis** — This lesson will examine a basic approach to project cost and schedule risk analysis, including Monte Carlo-based modeling and simulation. It covers the project risk environment, single point vs. range estimating, getting organized in terms of scope, schedule, cost, and reserves, modeling and simulation using Monte Carlo, recognizing traps, and putting it all together.

**CPM-300: Principles of Earned Value Management** — This course introduces the participant to the principles and terminology of EVM. It takes the participant through general terms, defining the EVM requirement, placing the requirement on the contract, getting the requirement implemented, defining reporting requirements, and monitoring performance. Special attention will be devoted to creating and maintaining the Performance Measurement Baseline (PMB) and the analysis of EVM data. Data integrity is fundamental to effectively utilizing EVM data and one of the best ways to ensure data integrity is to design quality and discipline into the project management system. Consequently, the course will review the EVMS Guidelines and Practice Standard as they relate to designing and operating a high quality project management system. The course addresses how EVM data is used at senior levels of corporations and the federal government by key decision-makers.

**Lesson A: EVM Principles & Terminology (Part 1)** — The Principles of Earned Value

Management is an introductory level course that familiarizes the participant with the basic principles and terminology used in earned value management. Lesson A begins by developing a foundational understanding of the utility of earned-value to managing a project or program. The participant will learn basic terminology and concepts associated with earned value management including the development and monitoring of the performance measurement baseline. The lesson also discusses how EVM system and reporting requirements are incorporated into contractual specifications. Project control system review criteria will be introduced and reporting standards discussed.

**Lesson B: EVM Principles & Terminology (Part 2)** — This lesson begins with a discussion of how earned value management is implemented at the control account level. The lesson then defines analytical terms and reviews the various techniques used to analyze performance measurement data. Following an introduction to data analysis, calculations of performance indices are explained along with their use to forecast cost at completion. Principles of variance analysis are discussed as are methods for incorporating changes into the performance measurement baseline (PMB). Over-Target Baselines (OTBs), financial reporting, and the post acceptance review process are also presented.

**Lesson C: Control System Design (Part 1)** — This lesson focuses on part one of the ANSI EIA 748 EVMS Standard. It includes discussions on project organization, and project planning, scheduling, resource loading, and budgeting.

**Lesson D: Control System Design (Part 2)** — This lesson focuses on part two of the ANSI EIA 748 EVMS Standard. It includes discussions on project accounting, analysis, and baseline control and revision.

**Lesson E: Establishing an Earned Value Management System (Part 1)** — This is part 1 of a two parts lesson that present the practical considerations that need to be addressed and the actions required to establish and successfully operate an Earned Value management system in a commercial, governmental or defense industry environment. The approach is more oriented to governance considerations rather than the technical operation of an EVM system. It is aimed at those who are likely to be involved in managing the establishment of an Earned Value management system to enhance their existing project management process. A scaleable approach is taken showing how the methodology is applicable to projects of all sizes, industry type or management philosophy. The lessons recognize that many businesses already practice some elements of performance management. The lessons outline the use of the PMBOK® Guide principles to establish an EVM system that builds on existing processes.

**Lesson F: Establishing an Earned Value Management System (Part 2)** — This is part 2 of a two part lesson and is a continuation of material presented in Lesson E.

**CPM-400 Principles of Earned Value Metrics and Analysis** — This course addresses the principles and terminology of EVM. It takes the participant through general terms, defining the EVM requirement, placing the requirement on the contract, getting the requirement implemented, defining reporting requirements, and monitoring performance. Special attention will be devoted to creating and maintaining the Performance Measurement Baseline (PMB) and the analysis of EVM data. This course presents advanced EV analysis and considers the impact of baseline changes on Estimate-At-Completion (EAC) computations. It addresses how a program/project manager obtains appropriated funds and how these funds are managed within the program/project office.

**Lesson A: Developing and Maintaining the Performance Measurement Baseline (Part 1)** — This lesson focuses on the process of understanding how cost, schedule, and technical baselines are integrated into the PMB and how changes need to be managed.

**Lesson B: Developing and Maintaining the Performance Measurement Baseline (Part 2)** — This lesson builds on the previous lesson and focuses on the meaning of project contingency and management reserve. The lesson will cover the topics of over-target baselines, and understanding the “rubber baseline”.

**Lesson C: Understanding Resource Management through EVM** — This lesson focuses on the role of resource management as a focus of EVM efforts. It emphasizes the use of EVM data and graphical tools as critical components in project resource allocation and management. It provides clear understanding of the meaning of various lines in EVM graphs as they relate to effective decision making. The lesson provides understanding of EVM charts, and includes interactive analysis of relevant data and graphics.

**Lesson D: Integrated Baseline Review** — The Integrated Baseline Review (IBR) should be a joint evaluation of baseline realism by the customer and contractor. This presentation provides participants with an understanding of how and when to plan an IBR, and when it is necessary to have successive IBRs on a project. Team preparation is essential for a successful IBR, and the presentation will discuss how to train the multi-functional members of an IBR team. The presentation will also describe how to develop a joint IBR plan and approach. It will describe how to conduct the review, with special emphasis on conducting baseline discussions that keep the focus on evaluating baseline realism, not system compliance. System level risks must also be addressed in the IBR, and the project managers must incorporate the results of the IBR into how the project is managed.

**Lesson E: Earned Value Data Analysis Techniques (Part 1)** — This lesson focuses on various earned value measurement techniques and will introduce the basics of both numerical and graphical analysis.

**Lesson F: Earned Value Data Analysis Techniques (Part 2)** — This lesson focuses on techniques for validating performance measurement data as presented in Cost Performance Reports. It reviews the various earned value data analysis techniques and includes methods of creating and graphically analyzing performance trends. The lesson focuses on EV based methods of forecasting and validating Estimates at Completion (EACs) and considers the impact of baseline changes on EAC computations.

**CPM-500 Principles of Technical Management** — This course begins with an examination of the concept of Work Breakdown Structures (WBS). The course will examine the guidance and “best practices” that result in developing an optimizing the WBS across multiple applications including: aerospace, construction, environmental management, and R&D. Risk management is an important aspect of all projects. Typically we think of risk in terms of cost, schedule, or technical issues. However, this course will focus primarily on the technical risk component and will give examples of how risk can be managed. Next, the course examines the role of systems engineering in the project office. The participant will learn many of the basic concepts of systems engineering with emphasis on its support role to the project planning and control function. Practitioners have learned through decades of experience that integrated product/project teams (IPT) are a critical component to improving coordination among the various project participants. Consequently, the course considers the “value-added” of the IPT to the project management process. Next, the course addresses the key material and subcontracts issues in an EVMS, the use of estimated actual costs for various categories of material and contract labor as well as proper treatment of accruals. Finally, the course examines the concept of technical performance

measurement. Examples of how technical performance measurement in multiple applications can be implemented will be examined.

**Lesson A: Development of the WBS** — This lesson covers a variety of technical subjects that have a direct impact on project controls. The lesson focuses on the concept of Work Breakdown Structures (WBS). It provides an understanding of the purpose and use of the WBS. The WBS is a crucial aspect of sound project management. The WBS is much like the binding on a book in that it helps to keep project information organized. This Lesson will explore the fundamentals of constructing a useful WBS for multiple applications. The Lesson will include discussions of guidance provided by multiple federal agencies that include construction, R&D, production, remediation, etc.

**Lesson B: Technical Risk Management** — This lesson addresses technical risk issues and their impact on project performance. It provides an overview of risk management for program team members. The lesson outlines the new DoD risk guide, new OMB Capital Programming Guide, NDIA Application Guide, and other updates to risk management requirements.

**Lesson C: Integrating Systems Engineering with EVM (Part 1)** — This lesson focuses on the role of systems engineering in translating technical requirements into the technical baseline. Often, project control specialists see the planning of the cost and schedule baselines as an isolated activity disassociated from the technical or engineering aspects. This type of thinking can significantly delay the development of the earned value baseline.

**Lesson D: Integrating Systems Engineering with EVM (Part 2)** — This lesson builds on the previous lesson and will help the participant recognize the technical, schedule, and cost baselines and how they relate to the Performance Measurement Baseline (PMB). The participant will learn why the role of systems engineering is so important to the project office.

**Lesson E: Material and Subcontract Issues in EVMS** — This lesson addresses the key material and subcontracts issues in an Earned Value Management System (EVMS). Gaining a solid foundation concerning how these important areas support the EVMS enables project control analysts, control account managers, and project management staff to understand, interpret, and analyze performance measurement data. The lesson addresses the use of estimated actual costs for various categories of material (and perhaps even contract labor) with examples that show how the improper treatment of accruals causes an invalidation of conclusions drawn from reports. Analysis of Earned Value (EV) data and the effects of the EV approach adopted for material and subcontracts are discussed. Other unique characteristics of the EVMS are addressed including determining price and usage variances for both labor and material, and ensuring consistency between budget and actual cost accumulation techniques. Subcontract issues include simplifying WBS integration, methods for securing key data, and integrated report development and reporting cycles.

**Lesson F: Implementing Technical Performance Measurement** — This lesson considers Technical Performance goals in terms of project objectives/constraints as well as product objectives/constraints. It discusses Technical Performance management and EVM in terms of effective set up, planning, and execution. It addresses planning to allocate resources, with some accuracy, to reduce risk in (and while) meeting requirements, and obtaining timely feedback to make planning and performance adjustments.

**CPM-600 Principles of Project Integration** — This course begins with a lesson that addresses putting together the pieces of the project into a cohesive whole. The lesson examines technical trade-offs, project plan updates, schedule updates, revisions of cost estimates, engineering modifications, change control, quality assurance and how they impact performance measurement. Next, the course examines role and challenges of integrated master planning and its impacts on integrated schedules particularly for large highly complex projects. The participant will learn the value of vertical, horizontal, and enterprise wide schedule integration. The course examines a variety of principles and techniques for integrating scheduling and EVM metrics to include evaluating both EV schedule variance and time-based variances. Understanding how to quantify and manage project risk and understanding how to express that in planning and revising the PMB is critical to effective project control. The participant will learn how to make risk management an integral part of the project planning and management processes. Next the participant will learn the importance of project integration through the use of case studies. Both buyer (government ) and seller (contractor) perspectives will be carefully analyzed.

**Lesson A: Integrating the Project's Technical Components** — This lesson addresses the integration (putting together the pieces) of the project into a cohesive whole. Project integration often includes technical trade-offs, project plan updates, schedule update, revised cost estimates, engineering modifications, quality assurance, change management, and performance measurement working together to ensure accomplishment of all project objectives. This lesson will provide an overview of project definition, change control, configuration management, work authorization, and information management as major components of the project integration responsibility.

**Lesson B: Integrating Scheduling and EVM Metrics** — This lesson focuses on showing how to correlate the schedule variance with a time based schedule. The lesson explains how sometimes work packages/activities that are contributing to the EV scheduling variance may not show on the physical schedules critical path. This lesson will discuss some of the pros and cons of both schedule measurement techniques and will show how an integrated analysis of both systems is critical to an accurate picture of true project status.

**Lesson C: Integrated Master Planning and Its Impact on Integrated Master Schedules** — This lesson focuses on the significance of the integrated master plan and integrated master schedule (IMP / IMS) concepts. The lesson provides insights into the hierarchical integration of schedules from the control account to the contract master schedule.

**Lesson D: Integrating Risk into PMB Development** — This lesson will examine the integration points between earned value management and risk management. While most project control professionals intuitively recognize there must be a linkage between variations in the parameters of a risk management metric and the expression of the project's earn value baseline, the trick is to articulate the "cross walk" between the two. The understanding of this relationship helps improve overall project integration.

**Lesson E: Project Integration: Buyer's Perspective (Case Study)** — This lesson is designed as the second to the last project integration lesson for the basic and intermediate courses (i.e. CPM-100, CPM-200...) contained in the POI. The focus of this lesson is to provide perspective of project management from the viewpoint of the buyer (i.e., government, general contractor, and end-user).

**Lesson F: Project Integration: Seller's Perspective (Case Study)** — This lesson is designed as the final project integration lesson for the basic and intermediate courses (i.e. CPM-100, CPM-200...) contained in the POI. The focus of this lesson is to provide

project management perspective from the viewpoint of the seller (i.e., contractor, subcontractor, vendor, service provider).

## **Name: Wayne F. Abba**

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**Project Management Experience:** More than 35 years

**Earned Value Management:** 25 years

**Teaching Experience:** 20 years

**Career Highlights:** Wayne F. Abba is an independent management consultant. He has more than thirty years experience in contract and project management, acquired during more than 35 years of public service. Before establishing his consulting business, Mr. Abba was Vice President for Integrated Management Services with Dekker, Ltd., a leading supplier of Project Portfolio Management Solutions. For seventeen years before retiring in 1999, Mr. Abba was the senior program analyst for contract performance management in the Office of the Under Secretary of Defense (Acquisition & Technology). He was awarded three Secretary of Defense Medals for Meritorious Civilian Service for his leadership in the acceptance of effectively integrated technical, schedule and cost performance management principles throughout the Department of Defense, the federal government, commercial enterprise, and in the governments and industries of friendly foreign countries. Mr. Abba holds a Bachelor of Science degree from the University of the State of New York and a Master of Public Administration degree from The American University in Washington, D.C. He is a member of the Project Management Institute, the National Contract Management Association and the Society of Cost Estimating and Analysis and holds a Professional Designation in Contract Management from the Air Force Institute of Technology and NCMA. In 1999 his contributions to the advancement of project management in the public and private sectors were recognized by PMI's Distinguished Contribution Award and also by the Government of Canada. He is a past president of the PMI College of Performance Management and serves on the National Defense Industrial Association's Program Management Systems Committee.

**Professional Certifications:** Professional Designation in Contract Management from the Air Force Institute of Technology and NCMA.

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## **Name: Catherine Ahye**

**Specialty:** Earned Value Management Systems

**Contact Information:**

**Phone:** 703-755-5849

**E-Mail:** Catherine.A.Ahye.ctr@nga.mil

**Mailing Address:**

**Project Management Experience:** 20 years

**Earned Value Management:** 20 years

**Teaching Experience:**

**Career Highlights:** Ms. Ahye 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. Currently Ms. Ahye is providing performance management consulting services to the National Geospatial-Intelligence Agency (NGA) government program offices and developmental contractors. Prior to arriving at NGA, Ms. Ahye has provided program offices training, standardization, mentorship, and oversight in the Earned Value and Program Management arena. In addition, she has led EVMS reviews including Integrated Baseline Reviews (IBRs), EVMS joint surveillance reviews, and other independent assessments.

**Professional Certifications:** Project Management Professional (PMP®).

**Education:** Masters and BS Degrees in Business Administration.

## **Name: Neil F. Albert**

**Specialty:** Project Performance Management, Cost Estimating and Analysis

**Contact Information:**

**Phone:** 703-506-4600

**E-Mail:** nalbert@mcri.com

**Mailing Address:** MCR, LLC, 2010 Corporate Ridge, Suite 350, McLean, Virginia 22102

**Project Management Experience:** 25 years

**Earned Value Management:** 20 years

**Teaching Experience:** 5 years

**Career Highlights:** Mr. Albert is President and CEO of MCR, LLC a small business specializing in cost/schedule analysis, acquisition management, and program assessment support. In his capacity, Mr. Albert directs and manages cost estimating, project management support, earned value management, contract management, software acquisition, logistics, and education and training in support of Government and industry customers. He has broad experience in electronics, transportation systems, information (software) systems, space and defense systems, energy, and environmental systems. Mr. Albert has been at MCR for over 16 years and has held many positions including Director of the Cost Analysis Division, Vice President, and Senior Vice President and General Manager. Previously, he was Director of Cost Estimating and Analysis at Textron Defense Systems where he directed and managed the cost analysis functions including cost estimating, cost/schedule control support, proposal development, cost/price analysis, cost systems development, Design-to-Cost and Life-Cycle Cost analysis. Other positions included Senior Cost Analyst at Analytical Systems Engineering Corporation, Financial Analyst at Calculon Corporation and Management Analyst at Computer Sciences Corporation. Mr. Albert is the primary developer and author MIL-STD-881B (Work Breakdown Structures for Defense Materiel Items) and MIL-HDBK-881 (Development of Work Breakdown Structures).

**Professional Certifications:** Certified Cost Estimator/Analyst, Society of Cost Estimating and Analysis (SCEA).

**Education:** BBA in Finance/Economics and MBA in Financial Management from The George Washington University.

## **Name: Frank T. Anbari**

**Specialty:** Project Management and Quality Enhancement

**Contact Information:**

**Phone:** 202-994-0404

**E-Mail:** anbarif@gwu.edu

**Mailing Address:** Project Management Program, The George Washington University, Fonger Hall, Suite 415, 2201 G Street, NW, Washington, DC 20052

**Project Management Experience:** 30 years

**Earned Value Management:** 25 years

**Teaching Experience:** 25 years

**Career Highlights:** Frank T. Anbari is a faculty member and past Director of the Project Management Program at The George Washington University. He gained extensive industrial experience serving in leadership positions at Amtrak, Day and Zimmermann, and American Water Works Service Company. He taught in the graduate Programs at Penn State University, Drexel University, and the University of Texas at Dallas, and for private and public organizations throughout North America and Europe. Dr. Anbari serves as member of the Editorial Boards of *Project Management Journal* (2000–Present), the *International Journal of Project Management* (2007–Present), and the *International Journal of Managing Projects in Business* (2007–Present). He served as Examiner (1993-1995) and Alumni Examiner (1999–2000) for the Malcolm Baldrige National Quality Award, and as member of the Editorial Review Board of *Quality Management Journal* (1993-1998). Dr. Anbari conducts rigorous research, presents widely, and publishes extensively on significant topics in project management, quality enhancement, and Six Sigma method.

**Professional Certifications:** PE, PMP®, and ASQ Certified Six Sigma Black Belt.

**Education:** PhD Project Management and Quality Enhancement, MBA, and MS Engineering, all from Drexel University, Philadelphia, PA.

## **Name: David C. Bachman**

**Specialty:** Earned-Value Management, Course Development, and Estimates At Completion

**Contact Information:**

**Phone:** 703-805-5259

**E-Mail:** dave.bachman@dau.mil,

**Mailing Address:** 6014 Forest Run Drive, Clifton, VA 20124

**Project Management Experience:** 16 years

**Earned Value Management:** 8 years

**Teaching Experience:**

**Career Highlights:** Mr. Bachman is currently employed as a professor at the Defense Acquisition University. He has extensive project management experience as both a military officer and senior program analyst. Mr. Bachman's military background includes extensive experience as a Navigator, Rated Staff Officer, JCS Intelligence Officer, and member of the Defense Acquisition Corps. He started his acquisition career as a student at Hughes Aircraft Company in the "Education With Industry" program. Mr. Bachman 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 Program Manager.

**Professional Certifications:** N/A

**Education:** B.S. Ceramic Engineering: Pennsylvania State University, MBA: Rutgers University,

M.A. Education: Marymount University.

## **Name: Patrick K. Barker**

**Title:** Principal, Executive Consulting Group

**Company Name:** MCR LLC

**Address:** 2010 Corporate Ridge, Suite 350 Mclean, VA 22102

**E-Mail:** pbarker@mcri.com

**Website:** www.mcri.com

**Telephone:** 703-898-6354

**Career Highlights:** 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 has over 20 years' leadership, training and analysis experience in military and civilian positions, to include program office team leadership, modeling and simulation development and policy guidance in various DoD and civilian capacities. Academic experience includes a 4-year tour as an Assistant Professor of History at the USAF Academy and extensive background in training and course development for almost two decades. During his 20-year USAF career, Mr. Barker was also a B-52 electronic warfare officer and a functional manager in technology warning for the Defense Intelligence Agency (DIA).

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

**Professional Memberships:** Pat is a member of 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.

## **Name: Paul F. Bolinger**

**Specialty:**

**Contact Information:**

**Project Management Experience:**

**Earned Value Management:**

**Teaching Experience:**

**Career Highlights:** Mr. Bolinger, with 30 years of direct experience, is a Consulting Engagement Director with Humphreys & Associates specializing in major complex projects. In the past three assignments covering a period of 8 years he has twice architected the development and implementation of project management systems on multi-billion dollar projects. He is familiar with the IMS requirements of DoD as well as recommended standard processes for schedule development and management. He is currently advising a client on the management of an IMS with more than 17,000 network activities compliant with DoD full schedule requirements in an Earned Value environment.

## **Name: Thomas L. Bowman**

**Specialty:** Earned Value Management, Procurement & Contracting, Cost Management, Material Management, Subcontract Management, Resource/ Capacity Management, Financial Management, Scheduling, Requirements Management, Risk Management,

Strategic Planning, Program Management, Program Office Implementation, Portfolio Management, Process/Business/Capabilities Assessments, Delivery Order Management, Instructional Systems Development, and Education/Training (Classroom Instruction).

**Contact Information:**

**Phone:** 937-426-8081

**E-Mail:** tom.bowman@robbinsgioia.com

**Mailing Address:** 4141 Colonel Glenn Hwy, Suite 210, Beavercreek, OH 45431

**Project Management Experience:** 20 years

**Earned Value Management:** 25+ years

**Teaching Experience:** Associate Professor of Performance Management, Air Force Institute of Technology (AFIT), 1978-1986. Course Direction/Instruction of SYS 360, 361, 362, 363 ; one, two, and three week courses in EVM (then C/SCSC).

**Career Highlights:** Mr. Bowman is currently employed as Senior Management Consultant for Robbins-Gioia LLC and Corporate Director of Earned Value Management. Tom served 24 years of distinguished active duty service with the Air Force in positions that included Deputy Director of Cost at what is now the Aeronautical Systems Center (ASC), Comptroller of the Wright Laboratories (Now Air Force Research Laboratories, AFRL), and Earned Value Field Command Focal Point for ASC. Since leaving active duty, Mr. Bowman has implemented EVMS for the Department of Energy Environmental Restoration Program, the FAA and IRS, the Joint Logistics Systems Center (JLSC), the Air Force Software Factory/Materiel Systems Group, the FIRST Program, and the Joint Strike Fighter (JSF) Program.

**Professional Certifications:** DoD Certified Acquisition/Program Manager-Comptroller (Level III) by DoD Acquisition Professional Development Program (APDP); 1991.

**Education:** B.A. in Biology and Secondary Education: University of Evansville,  
M.A. Management/Human Relations (Industrial Psychology) Webster University.

## **Name: Lloyd L. Carter**

**Specialty:** Design, Development and Implementation of Performance Management Systems

**Contact Information:**

**Phone:** 703-232-1661 x102

**Email:** lloyd.carter@vitalthought.com

**Mailing Address:** 1900 Campus Commons Drive, Suite 100, Reston, VA 20191

**Project Management Experience:** 40 years

**Earned Value Management:** 40 years

**Teaching Experience:** Past Associate Professor, Air Force Institute of Technology, University Guest Lecturer, Conducted multiple public seminars.

**Career Highlights:** Lloyd L. Carter is currently an Engagement Manager, VitalThought LLC. He has been involved with Project Management Systems and Earned Value Performance Management (EVPM) since 1968. He participated in the review of the first contractor to be validated under what was then called the Cost/Schedule Planning and Control Specification (CSPCS). While in the United States Air Force, Mr. Carter served in various acquisition management positions directly related to Project Management and Performance Management Systems. This included assignments ranging from source selection to contract operation activities. From 1972 to 1981, he served as Associate Professor of Acquisition and Project Management at the School of Systems and Logistics at the Air University. During this time he was the Director in Charge of the Cost/Schedule Control Systems Implementation and Surveillance Courses. Included in

the duties was providing consulting services to various Department of Defense agencies as well as to the National Aeronautic and Space Agency, Department of Energy, and Department of Transportation. Mr. Carter has written or tailored governmental policies, regulations, and contractual requirements to meet the needs of foreign military sales, construction, development, and manufacturing projects. In the international consulting arena he has designed, developed, and conducted public and in-house seminars on Performance Management Systems attended by thousands of students. While living in Australia he owned and operated MTC AustralAsia Pty Ltd and managed the Australian International Performance Management Conference as well as the United Kingdom International Performance Management Conference in conjunction with the United Kingdom Royal United Services Institute. He has designed and implemented project performance management systems and provided consulting services to over 200 contractor and governmental organizations in the United States, Canada, England, France, Italy, Japan, Australia and Saudi Arabia.

**Professional Certifications:** Professional Designation in Contract Management, Project Management Professional

**Education:** BA in Business, Indiana University; MBA and Post Graduate Studies, Ohio State University.

## **Name: Gary E. Christle**

**Specialty:** Integrated Project Management Systems

**Contact Information:**

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**E-Mail:** [christig@can.org](mailto:christig@can.org)

**Mailing Address:** 15916 Edgewood Dr., Dumfries, VA 22026

**Project Management Experience:** 13 years

**Earned Value Management:** 27 years

**Teaching Experience:**

**Career Highlights:** Mr. Christle is currently employed at the Center of Naval Analysis as the Scientific Analyst to the Assistant Secretary of the Navy (RD&A). He retired from federal service in 2000 as the Deputy for Acquisition Management, Office of the Under Secretary of Defense (AT&L). Prior to his position in AT&L, Mr. Christle was a budget analyst with the DOD Comptroller, an Operations Research Analyst with the Cost Analysis Directorate, Comptroller of the Army, A Management Intern with the Office of the Chief of Staff of the Army, and a mechanical engineer with Honeywell. As a Lieutenant in the U.S. Army, Corps of Engineers, he was a turbine engine test engineer with the Army Aeronautical Depot Maintenance Center and served in Vietnam as a Platoon Leader and Company Commander with the 23<sup>rd</sup> Infantry Division. Mr. Christle was the distinguished military graduate of Northeastern University and is a recipient of the Northeastern University Outstanding Alumni Award in the Field of Public Service; the Defense Distinguished Civilian Service Medal (twice), the Presidential rank designation of Meritorious Executive; the David Packard Excellence in Acquisition Award, the General Hans H. Dressnack Distinguished Service Award, and the Vice President's "Hammer" Award. Mr. Christle is a member of the OSD Acquisition Corps, is a member of the Project Management Institute and the National Defense Industrial Association, and is an Honorary Professor of the Defense Systems Management College.

**Professional Certifications:** DOD level III certification in Program Management.

**Education:** B.S. in Mechanical Engineering: Northeastern University, M.B.A. (Finance): The George Washington University.

**Name: Anita Cukr****Specialty:** Earned Value Management**Contact Information:****Phone:** N/A**E-Mail:** anita.cukr-contractor@mda.osd.mil**Mailing Address:** 2110 Washington Blvd, Suite 150, Arlington, VA 22204**Project Management Experience:** 20 years**Earned Value Management:** 11 years**Teaching Experience:** 8 years

**Career Highlights:** Significant Expertise in Earned Value Management (EVM): Former Vice President of Communications for the College of Performance Management (CPM), an elected member of the Governing Board responsible for strategic planning. Former Managing Editor of the Measurable News, the quarterly CPM publication. Published author. Former Professor of EVM at the Defense Systems Management College. Managed a track on Integrated Program Management sponsored by CPM at the 2002 Software Technology Conference.

Currently support the Missile Defense Agency (MDA) as a consultant on EVM systems implementation at MDA program offices. Our management consulting approach includes an assessment visit to determine the state of the EVM systems, training to facilitate "culture change" toward more effective organizational understanding and use of EVM, and follow-up visits to assist with establishment and maintenance of the EVM baseline (Integrated Baseline Reviews). I consult on the full range of issues related to EVM, to include effective use of EVM progress measures, automated tools, estimating methods, using EVM to facilitate risk management.

Former Deputy Program Manager for the contractor workforce assigned to the National Missile Defense Program EVM task. Ms. Cukr has over 20 years of experience in Department of Defense financial management (cost estimating, budget).

**Professional Certifications:** Certified Project Management Professional, Graduate of Defense Systems Management College Program Manager Course, Level III Acquisition Workforce professional upon retirement from the Air Force.

**Education:** B.A. in Business Administration: University of Nebraska at Omaha, M.S. Management Engineering: George Washington University, and Distinguished Graduate-Air War College.

**Name: John D. Driessnack, CCE/A, PMP****Title:** Senior Director, Integrated Program Management, Executive Consulting Group**Company Name:** MCR LLC**Address:** 2010 Corporate Ridge, Suite 350, McLean, VA 22102**E-Mail:** jdriessnack@mcri.com**Website:** www.mcri.com**Telephone:** 703-472-5357 (cell)

**Career Highlights:** 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.

## **Name: Anthony (Tony) E. Finefield**

**Specialty:** Development and Assessment of Earned Value Management Systems

**Contact Information:**

**Phone:** 714-642-8795

**E-Mail:** tonyevm@earthlink.net

**Mailing Address:** 6701 Healey Avenue, Garden Grove, CA 92845-2217

**Project Management Experience:** 26 years

**Earned Value Management:** 30 years

**Teaching Experience:**

**Career Highlights:** Mr. Tony Finefield has over thirty years of experience in the area of Earned Value Management Systems. As a Naval Supply Corps Officer he was assigned to the Defense Contracts Management Area Santa Ana where he was responsible for supervising an EVMS Surveillance program that included four validated contractors with nine contracts valued at over \$1 Billion. Subsequent to that, Mr. Finefield worked for five years in two Air Force Plant Representative Offices (AFPROs): TRW Defense and Electronics Sector and Rockwell International, Autonetics Division. As the EVMS Surveillance Monitor, he was responsible for ensuring continued contractor compliance with their approved EVMS. In March 1983, Mr. Finefield joined the Cost Information & Management Systems Division of Air Force Space Systems Division (now Space and Missile Systems Center) where his responsibilities include being the SMC Field Command Focal Point for the implementation of earned value management on all major acquisitions at SMC. Additionally, he has led reviews at such diverse contractors as Martin Marietta Astronautics Group; TRW Defense & Space Sector; Lockheed Missiles and Space Company; Boeing Aerospace and Electronics; and, General Dynamics Space Systems Division. Mr. Finefield led the multi-service, multi-agency team charged with the rewrite of the Joint Implementation Guide and its transition into the Earned Value Management Implementation Guide, published in December 1996. Mr. Finefield served as the Chief of the Acquisition Cost Division at SMC from Nov, 1997 to June 2001. His duties included supporting program offices in generating program level cost estimates; supporting cost model research and maintenance; supporting the program offices in the preparation for and conduct of Integrated Baseline Reviews (IBR's); and, providing earned value training to both program office and staff personnel. Mr. Finefield retired from Government Service on 1 July 2001 and now works as a private consultant, providing support to both private industry and government agencies.

**Professional Certifications:**

**Education:** B.S. in Accounting, Little Rock University, MBA, Cal State University Long

Beach.

## **Name: Doug Fisher**

**Specialty:** Cost and Schedule Management, Earned Value Management

**Contact Information:**

**Phone:** 714.685.1730

**E-Mail:** Ghconsult@aol.com

**Mailing Address:** N/A

**Project Management Experience:** Over 30 years

**Earned Value Management:** Over 30 years

**Teaching Experience:** N/A

**Career Highlights:** Doug Fisher has over thirty-five years of Department of Defense (DoD), Department of Energy (DoE), and private industry experience in Program/Project Management, Earned Value Management, Cost Estimating and Analysis, Management Systems, Contract Management, and Financial/Business Management. His experience includes several assignments as a program/project manager, a continuing involvement with earned value management since 1970, significant involvement in parametric and discrete cost estimating and analysis, extensive participation in the source selection process, and numerous analyses of contractors' financial/business systems. Also, he has implemented and operated compliant Cost/Schedule Control Systems (C/SCSC), performed as team leader and team member in compliance/validation reviews, implemented Earned Value Management Systems (EVMS) tailored to special needs, developed Requests for Proposals (RFP), negotiated contracts, and developed recommendations for Management Information Systems.

**Professional Certifications: Education:** BS in Mechanical Engineering, MS in Aerospace Engineering, and MBA in Finance.

## **Name: Eleanor L. Haupt**

**Specialty:** Earned Value analysis and training

**Contact Information:**

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**E-Mail:** ehaupt@earnedvalue.biz

**Mailing Address:** Earned Value Associates LLC, 2762 Lorrie Drive, Beavercreek, OH 45434

**Project Management Experience:** 26 years

**Earned Value Management:** 26 years

**Teaching Experience:** 12 years

**Career Highlights:** Eleanor is a senior partner with Earned Value Associates LLC, a training and consulting company dedicated to improving earned value management. Eleanor provides customized support for EVM implementation and policy development to private and public clients. As part of EVMS implementation for a client, she conducts gap analyses and continuous improvement assessments, as well as compliance and integrated baseline reviews. Eleanor has developed and presented a wide variety of training materials covering the full spectrum of EVM, and is also a certified wInsight instructor. She is a frequent speaker, trainer, and keynoter at national and international EVM conferences. Eleanor is the author of several guides and manuals, and has been a major contributor to other guides. Prior to entering the public sector, she had a successful career within the Department of Defense for over 26 years, and was a leading expert on several key teams. She worked for the U.S. Air Force, Navy and Army, and has supported numerous programs in financial and cost management,

specializing in earned value management and integrated management. Eleanor was the EVM focal point at Aeronautical Systems Center and responsible for policy development, guidance, training, and direction for the application of EVM on all Air Force programs at the center. Eleanor served as Executive Vice President and President of the PMI College of Performance Management, and now serves on the Education Committee.

**Professional Certifications:** Level III DAWIA certification in Budget, Cost Estimating and Financial Management; Professional Designation in Cost Analysis and Price Analysis

**Education:** Bachelor degree, Capital University, Columbus OH.

## **Name: Donna G. Holden**

**Specialty:** Schedule Risk Assessment, EVM Tripwires, EVMS Surveillance

**Contact Information:**

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**E-mail:** donna.holden@dcma.mil

**Project Management Experience:**

**Earned Value Management:**

**Teaching Experience:**

Career Highlights: Donna Holden is a graduate of The Ohio State University with a Bachelor of Science in Business Management. She supported the Air Force and SAIC before relocating to southern Maryland. There Ms. Holden began working for the Naval Air Systems Command (NAVAIR) in 2000 as part of the Earned Value Management division of the cost department. Ms. Holden co-developed, authored, and implemented the Schedule Risk Assessment (SRA) process currently in use at NAVAIR. Over the course of her tenure with the Navy, Ms. Holden performed numerous SRAs on ACAT1 programs at Department of Defense (DoD) industry leaders such as Lockheed Martin, Northrop-Grumman, Sikorsky, Bell Helicopters, and Rockwell.

In August 2006, Ms. Holden moved to the Defense Contract Management Agency (DCMA). Ms. Holden is currently the Policy, Process & Training Coordinator for the DCMA EVM Center. Her duties include documentation and standardization of DCMA EVM processes, procedures, and training aligned with the standardization thereof. Ms. Holden is also the process owner for the DCMA Tripwires briefs presented as required by OSD in the Defense Acquisition Executive Summary (DAES).

Further education and certification includes: Masters in Business Administration from the University of Maryland, 2004; Level III DAWIA certified in Business, Cost Estimating, and Financial Management from the Defense Acquisition University as of January 2004. Project Management Professional (PMP) certification from the Project Management Institute (PMI) in April 2004. Association for Advancement of Cost Engineering Earned Value Professional (EVP) 2007.

## **Name: Joe Houser**

**Specialty:** Program Management, project performance measurement, OMB-300, earned value systems, risk management (design, development, implementation and training)

**Contact Information:**

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**Mailing Address:** 22222 Overview Ln, Boyds, MD 20841

**Project Management Experience:** 25 years

**Earned Value Management:** 25 years

**Teaching Experience:** 20 years

Career Highlights: Mr. Houser has over 35 years of program and financial management experience in both the commercial and the government sectors. He is currently Senior Management Consultant with KM Management Group. Prior to KM Management Group, Joe was a Deputy Program Manager with both SAIC and Lockheed Martin. Mr. Houser's experience includes corporate-level responsibilities for earned value management for IBM and Lockheed Martin, and he has led several program performance process improvement initiatives. Joe has served as Risk Manager for several large scale programs. Joe's experience with IBM and Lockheed Martin includes assignments developing and implementing schedule, cost, risk, and earned value management systems on large scale complex programs.

Mr. Houser is a founding member and past Chairman of the Board and President of the Performance Management Association (now PMI-CPM). He is a past member of the National Security Industrial Association (NSIA) procurement committee; served as a NSIA industry advisor to the Department of Defense Performance Measurement Joint Executive Group (PMJEG); and is past Chairman of the NSIA Subcommittee on Performance Management. He organized and led a joint DoD/Industry TQM study on the DoD cost/schedule management process. The eighteen-month study had 17 of the 18 recommendations implemented by the Department of Defense. The Honorable Donald J. Yockey, Under Secretary of Defense (A), referred to the study as a "model for future government/industry relations." He has published several papers and is a speaker and lecturer on cost/schedule control and management.

**Professional Certifications:** Lockheed Martin Qualified Program Management, IBM Process Re-Engineering Consultant

**Education:** B.S. in Business Administration, University of Maryland.

## **Name: David T. Hulett**

**Specialty:** Risk Management

**Contact Information:**

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**Mailing Address:** 12233 Shetland Lane, Los Angeles, CA 90049

**Project Management Experience:** 25+ years

**Earned Value Management:** 25+ years

**Teaching Experience:** 25+ years (taught Economics at Harvard)

Career Highlights: David Hulett consults in project risk analysis and management through his firm, Hulett & Associates, LLC of Los Angeles. His clients have included companies in many commercial industries and aerospace and defense, as well as US Government agencies. Dr. Hulett chaired the Project Management Institute Risk Management SIG committee that revised Chapter 11 of the Guide To the PMBOK® 2000. He is a member of the core committee to revise the guide for 2003. Dr. Hulett served as a Director for Region II in the first year of the RM SIG's existence and currently serves as Director of Technology Development. Dr. Hulett has presented papers on cost and schedule risk analysis to many professional societies including PMI (European Project Management conferences in Jerusalem (2000) and London (2001) and chapters in Orange County, Los Angeles, San Diego, Los Alamos and New Jersey, INCOSE and AACE. He presents annually at the conference of the Integrated Project Management College (IPM) of PMI. He has presented papers on project risk analysis at the Primavera Users Conference, Palisade User Conference and the INCOSE-RMSIG joint risk management conference. He has recently published papers in the *Project Management Journal* and *PM Network* on project risk analysis. Dr. Hulett presented the

annual risk management seminar in the PMP examination preparation course for the PMI / Orange County CA Chapter for 6 years. He has held strategic planning positions at TOSCO and TRW. In the Federal government, Dr. Hulett managed offices in the Federal Energy Agency, Department of Energy and the Office of Management and Budget. He taught economics as an Instructor at Harvard University. His Ph.D. is from Stanford and B.A. from Princeton.

**Professional Certifications:** N/A

Education: B.A. Economics: Princeton University, Ph.D. Economics: Stanford University.

## **Name: Gary C. Humphreys**

**Specialty:** Project performance measurement, earned value systems design, development, implementation and training

**Contact Information:**

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**Mailing Address:** 3111 N. Tustin Ave., Suite 120, Orange, CA 92865

**Project Management Experience:** 30+ years

**Earned Value Management:** 30+ years

**Teaching Experience:** 30+ years

**Career Highlights:** Gary C. Humphreys is the president and executive officer of Humphreys & Associates, Inc. As a consultant, Mr. Humphreys has provided technical support in all phases of project management to clients in the United States and other countries. He is a graduate of the University of California at Berkeley (USA), with a master's degree in business administration from the University of Southern California (USA). He has served as chairman of the National Defense Industrial Association (NDIA) Management Systems Subcommittee, and president and chairman of the board of the Performance Management Association, which has now become the Project Management Institute's College of Performance Management. In 1998 he was a recipient of the United States Department of Defense's highest acquisition award, the David Packard Excellence in Acquisition Award.

**Professional Certifications:** Recipient of the David Packard Excellence in Acquisition Award

**Education:** B.S. Business Administration: University of California Berkeley, M.B.A. Business Administration: University of Southern California.

## **Name: Jack Kersbergen**

**Specialty:** Earned Value Management.

**Contact Information:**

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**Mailing Address:** Zachry Engineering Corporation, 1515 Arapahoe St, Tower 1 Ste 800, Denver, Colorado 80202

**Project Management Experience:** 20 years

**Earned Value Management:** 18 years

**Teaching Experience:** 12 years

**Career Highlights:** Significant Expertise in Earned Value Management (EVM) in both government and commercial environments. Former VP/Director of Administration for the Raytheon US Antarctic Program, Jack currently holds a management position with Utility Engineering Corporation in Denver, Colo. responsible for Project Services and Project Controls on large electric power generation projects. He gained his extensive

background in Project Management, Contracts, Procurement, and Earned Value with employment at Ball Aerospace Systems, Hughes Aircraft Information Technology, and Raytheon. As an independent consultant for Project Management and Earned Value, his clients included TRW, Chrysler, Price Waterhouse, and the US Navy NAVAIR F-14 Upgrade Program. Jack is a past two term President of the MicroFrame Software National Users Group, two-term Past President of the Denver Chapter of Performance Management Association (now PMI-CPM), and was on the Board of Directors for the National Security Industrial Association Management Systems Subcommittee, and has presented several past papers on Earned Value Management Systems at national conferences. He teaches and lectures on Project Management and Earned Value Management Systems at the University of Colorado. He is also on the Education Committee for the PMI Denver Chapter and is a Denver Chapter trainer for the PMI® PMP® Exam preparation classes.

**Professional Certifications:** Certified Project Management Professional PMP®

**Education:** B.S. in Business Administration: Regis University, Denver CO, Associate Electrical Engineering, DeVry University.

## **Name: Keith A. Kratzert**

**Specialty:** Earned Value Management Processes

**Contact Information:**

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**E-Mail:** keith.kratzert@faa.gov

**Mailing Address:** N/A

**Project Management Experience:** 20 + years

**Earned Value Management:** 20 + years

**Teaching Experience:** 3 years

**Career Highlights:** 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. Specific efforts include establishing EVM policy and guidance within the FAA Acquisition Management System, planning for and conduct of Integrated Baseline Reviews (IBR), preparing and presenting EVM training, coordinating external training course content to ensure a consistent EVM approach within the FAA, program and contract level validation, program and contract level surveillance, 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 for ten years as a 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 the Strategic Air Command and Air Force Systems Command. He received a Level IV, Senior Acquisition Manager certification from the Air Force Systems Command.

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.

**Professional Certifications:** N/A.

**Education:** B.S. in Mechanical Engineering: Ohio University, M.S. Public Administration: Troy State University.

## **Name: Gerald J. Land**

**Specialty:** Project management, business management, and instructional design

**Contact Information:**

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**Mailing Address:** 6463 Waterfield Road, Alexandria, VA 22315

**Project Management Experience:** 15 years

**Earned Value Management:** 2 years

**Teaching Experience:** 15 years

Career Highlights: Mr. Land is a professor of financial management at the Defense Acquisition University (formerly the Defense Systems Management College), with headquarters at Fort Belvoir, Virginia. In this capacity, he is responsible for teaching and developing various courses in the business, cost estimating and financial management career field. Mr. Land served in the U.S. Army for 26 years before retiring with the rank of Colonel. His military assignments were in a wide variety of career fields including intelligence, communications, personnel, resource management and acquisition management. Key duty assignments included commanding two intelligence units; comptroller of an intelligence organization and of a medical research institute; senior intelligence officer (ACS, G-2) of a command in Vietnam; chief of four resource management-related divisions (at Headquarters, Department of the Army and Army Materiel Command: military professor of acquisition management at the Defense Systems Management College (DSMC); and staff officer at various headquarters levels to include three assignments on the Army Staff.

Professional Certifications: Army Acquisition Corps — Certified Level III Program Manager, and Certified Public Accountant.

**Education:** B.B.A. in Financial Accounting: Midwestern University, M.B.A. (Contract Management and General Business): Florida Institute of Technology, M.S.A. (Managerial Accounting) George Washington University, Defense Program Management Course: Defense Systems Management College, National Security Management (non-resident): Industrial College of the Armed Forces, and Executive Development Course: University of Houston. Professional military training includes: Intelligence Research Officer Course, Military Intelligence Officer Advanced Course, and Basic Signal Corps Officer Course.

## **Name: Robert Loop**

**Specialty:** Earned-Value Management, Planning

**Contact Information:**

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**Mailing Address:** N/A

**Project Management Experience:** 23 Years

**Earned Value Management:** 23 Years

**Teaching Experience:** 16 Years

Career Highlights: Robert Loop is the Senior Manager of Central Program Finance and Planning Lockheed Martin Information Systems & Global Services. He has responsibility for EVM, Planning, Tools, and related certifications. He has extensive program implementation and practical experience with EVM, with 23 years of experience in the

field. He has extensive surveillance review experience over his career. At Lockheed Martin, he holds two level 3 (Master) certifications, one in EVM and the other in Planning. He is also active in the National Defense Industrial Association Program Management Systems Committee (NDIA-PMSC). He led/facilitated the team that developed the NDIA PMSC Surveillance Guide.

Robert is a licensed Certified Public Accountant in the state of Colorado. His educational background includes a Bachelor of Business Administration, and a Masters of Science in Accounting.

**Professional Certifications:** Certified Public Accountant (Colorado)

**Education:** BBA Business Administration, MS Accounting

## **Name: Walter Majerowicz**

**Specialty:** Project Scheduling and Earned Value Management

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**Mailing Address:** Computer Sciences Corporation, Code 490, NASA Goddard Space Flight Center, Greenbelt, MD 20771

**Project Management Experience:** 20 years

**Earned Value Management:** 12 years

**Teaching Experience:** 12 years

**Career Highlights:** Mr. Majerowicz is the Deputy Program Manager for the Computer Sciences Corporation's Program Analysis and Control (PAAC) II subcontract at NASA's Goddard Space Flight Center, where he is also an Integrated Program Team Leader for task orders providing scheduling, configuration & data management, project support and Management Information Systems services to NASA programs and projects. Mr. Majerowicz also serves as a subject matter expert in project scheduling and earned value management. Previous responsibilities included PAAC Team Leader for the Structure and Evolution of the Universe (SEU) Program. Mr. Majerowicz was also the Planning & Schedule Manager on the Tropical Rainfall Measuring Mission (TRMM), a major in-house NASA project, and the Polar Operational Environmental Satellites (POES) Program, a major out-of-house effort. Prior to joining CSC, Mr. Majerowicz held numerous positions in program planning and control at The Boeing Company and the Martin Marietta Corporation. Mr. Majerowicz is co-chair of the annual NASA Project Management Challenge conference. He is also a faculty member for the NASA's Academy of Program/Project & Engineering Leadership in the fields of project scheduling and earned value management. Mr. Majerowicz holds an M.B.A. from the University of Baltimore and a Certificate in Technology Management from the California Institute of Technology (Caltech). He is a certified Project Management Professional (PMP) with the Project Management Institute (PMI) and is also a member of PMI's College of Scheduling (COS) and College of Performance Management (CPM) where he is a member of the training faculty. Mr. Majerowicz has been a lecturer and keynote speaker at NASA, PMI-CPM, PMI-COS, IQPC and SCEA conferences, classes and forums. Award honors include the NASA Public Service Medal, the CSC Science and Information Services Business Area Excellence Award in Program/Project Management, and the NASA Goddard Outstanding Mentor Award.

**Professional Certifications:** Project Management Professional (PMP®)

**Education:** A.A. Business & Public Administration: Anne Arundel Community College, B.S. in Business Administration: Salisbury State University, M.B.A. (Business): University of Baltimore, Certificate in Technology Management: California Institute of

Technology (Caltech).

## **Name: Dan Milano**

**Specialty:** IT capital planning and investment control, implementing Earned Value Management, financial management, and operations research.

**Contact Information:**

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**Mailing Address:**

**Project Management Experience:**

**Earned Value Management:**

**Teaching Experience:**

**Career Highlights:** 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 information technology (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. In addition to his career at the FAA, Daniel was a Senior Financial Advisor to Air Force Assistant Secretary for Financial Management (SAF/FM). He advises SAF/FM on family housing and utilities privatization initiatives; aircraft and facilities leasing and conducts financial research in key areas such as aerospace company financial health. Prior to working for the US Air Force, Daniel Milano was an operations research analyst with Naval Center for Cost Analysis (NCCA). He was the IT program manager for the Visibility and Management of Operating and Support Cost (VAMOS) system. He has also worked on various special studies for the Under Secretary of the Navy, the Vice Chief of Naval Operations (VCNO), the Assistant Secretary of the Navy for Financial Management & Comptroller (ASN FM&C) and the Assistant Secretary of the Navy for Research, Development & Acquisition (ASN RDA). Mr. Milano previously worked as a mechanical engineer for the Naval Air Systems Command (NAVAIR). 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.

**Professional Certifications:**

**Education:**

## **Name: David L. Muzio**

**Specialty:** Procurement Policy, Earned Value Management Systems

**Contact Information:**

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**Mailing Address:**

**Project Management Experience:** 37 years

**Earned Value Management:** N/A

**Teaching Experience:** N/A

**Career Highlights:** 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 includes: (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* .

**Professional Certifications:**

**Education:** B.S., Business Administration, University of California, Berkeley; M.B.A., Auburn University; Graduate, Air Force Education With Industry Program, at The Boeing Company.

**Name: Glen Phillips**

**Specialty:** Earned Value Management, Integrated Project Planning

**Contact Information:**

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**Mailing Address:** 1655 North Ft Myer Drive, Suite 1000, Rosslyn VA 22209

**Project Management Experience:** 25 years

**Earned Value Management:** 10 years

**Teaching Experience:** 7 years

**Career Highlights:** Glen Phillips has over 25 years of acquisition project management experience primarily within the department of defense. During that time he has managed major and less than major weapon system development efforts; been responsible for resources and budgets for major US Air Force test ranges and facilities; and served as a faculty member and department chair at the Defense Acquisition University (DAU). While at DAU he was responsible for course development and

teaching in a variety of earned value management and program management classes. While at DAU and since his retirement from the Air Force and joining Acquisition Solutions, Glen has provided consulting services to many defense and civilian federal agencies regarding earned value management, acquisition strategy development, and project planning and scheduling. Since joining Acquisition Solutions Inc, Glen has developed Acquisition Solution's the "Essentials of Earned Value Management" course and co-developed the "Integrated Project Planning" course.

Glen facilitated a training session in CPM 600 during the Nov 2002 PMI conference and co-facilitated a workshop on "Earned Value Management in Performance Based Acquisitions" during the Fall 2006 and Spring 2007 conferences.

**Professional Certifications:** Air Force Acquisition Corps, DAIWA certifications in Program Management (Level 3), Test and Evaluation (Level 2), and Business Financial Management (Level 2). Glen is also a certified Project Management Professional (PMP).

**Education:** B.S. Management: Troy State University, M.B.A. (Business): Troy State University. PMC 92-2, DAU (Defense Systems Management College).

## **Name: Parviz F. Rad**

**Specialty:** Project Management and Work Breakdown Structure Development

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**Mailing Address:** Project Management Program, Stevens Institute of Technology, Castle Point on Hudson, Hoboken, NJ 07030

**Project Management Experience:** 30 years

**Earned Value Management:** 20 years

**Teaching Experience:** 20 years

**Career Highlights:** Dr. Rad is currently employed by the Stevens Institute of Technology as a Distinguished Service Professor. As the Director of the Project Management Program, he is responsible for developing and fostering initiatives for enhancement of the existing curriculum and delivers core project management courses. Dr. Rad has extensive academic, government, and private sector experience in the field of project management. He has over fifty publications in the areas of engineering, construction, project planning, and project management. His employers have included: MIT, U.S. Department of the Interior, Clemson University, Charles T. Main Corporation, Merck & Company, Inc., Western Michigan University, University of Idaho, and The George Washington University.

**Professional Certifications:** Registered Professional Civil Engineer (South Carolina), PMI's Certified Project Management Professional (PMP), and is a Certified Cost Engineer (AACE).

**Education:** B.S. Civil Engineering: Tehran University, M.S. in Civil Engineering: Ohio State University, Ph.D. Civil Engineering: Massachusetts Institute of Technology.

## **Name: Robert D. Reuter**

**Specialty:** Project management, cost estimating, logistics management, program analysis and training

**Contact Information:**

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**Mailing Address:** N/A

**Project Management Experience:** 25+ years

**Earned Value Management:** 20 + years

**Teaching Experience:** 15 years

**Career Highlights:** Mr. Reuter is currently employed by MCR Federal, Inc., of McLean, Va. He serves as a program manager and senior earned value management analyst. Mr. Reuter has over 25 years of successful experience in project management, cost estimating, weapon system acquisition, logistics management, program analysis and training course development and presentation. He held a variety of management and staff positions within the Department of Defense acquisition process. Sixteen years of experience relate to the implementation, analysis, reporting and oversight of EVMS applications, of which five years are directly related to the integration with enterprise business management systems. He also has over three years experience in the development of acquisition and life cycle cost estimates for weapons and IT systems. Currently serving as the Project Manager for the implementation of an earned value management system (EVMS) effort for AT&T Government Solutions, Inc.

**Professional Certifications:** Army Acquisition Corps- Certified at Level III in program management

**Education:** B.S. Mechanical Engineering: SME, M.S. Business Management: University of Wyoming, Graduate PMC-85-2: Defense Systems Management College, Graduate-U.S. Army Command and General Staff College, Graduate-National Security Management: National Defense University.

## **Name: L. Sue Robinson**

**Specialty:** Earned Value Management

**Contact Information:**

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**Mailing Address:**

**Project Management Experience:** 35+ years

**Earned Value Management:** 30+

**Teaching Experience:** 25+

**Career Highlights:** Sue Robinson has over 35 years of Scheduling and Financial Management experience. During that time she has been involved in the program planning functions of scheduling and budgeting, as well as the design and operation of automated business management systems. Responsibilities included schedule development, validation, schedule/cost integration, baseline change control and customer reporting. She has also conducted Joint Surveillance Reviews and teaches Integrated Schedule and EVMS.

## **Professional Certifications:**

**Education:** **Name: Donald M. Scelzo**

**Specialty:** Scheduling

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**Mailing Address:** The Boeing Company, 100 N. Riverside, MC 5003-2730, Chicago, IL 60606-1596

**Project Management Experience:** 40 years

**Earned Value Management:** 10 years

**Teaching Experience:** Taught scheduling classes at Boeing Integrated Defense Systems-Long Beach, including Fundamentals, Risk Analysis, Networking and Critical

Path Analysis.

**Career Highlights:** 23 years with Boeing, including 14 years with Rockwell International-North American Aircraft, supporting the B-1B, X-31 and C-17 programs in the areas of Production Operations, Logistics, and Program Planning and Control. 8 years with the U.S. Postal Service as Industrial Engineer and Automation Planning Coordinator for the Northeast Region. 12 years with General Motors as Industrial Engineer supporting assembly operations.

**Certification:** Certificate in Applications Programming; University of California-Los Angeles.

**Education:** M.B.A., Fordham University, Finance/Marketing. M.S., New York University, Industrial Engineering. B.I.E., Kettering University.

## **Name: John E. Singley**

**Specialty:** Program/ Project Management, Earned Value Management, Earned Value/Project Management Guidance and Training

**Contact Information:**

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**Mailing Address:** US Army Corps of Engineers, Institute for Water Resources, 7701 Telegraph Road, Alexandria VA 22315-3868

**Project Management Experience:** Over 25

**Earned Value Management:** 20 years

**Teaching Experience:** 10 years

**Career Highlights:** Dr. Singley is the President of the PMI College of Performance Management and has served the College steadily since 2000, as Vice President for Professional Development for three years and as Executive Vice President for five years. As VP for Professional Development, John led the team that produced the EVM Practice Standard, managed the CPM conferences, and initiated the CPM professional education program. Dr. Singley has a Masters Certificate in Project Management from the George Washington University and is a PMI Project Management Professional (PMP). John has worked for the United States government for over twenty years, primarily as a research scientist and as a program and project manager.

**Professional Certifications:** PMP®, and Master's Certificate in project management

**Education:** Ph.D. in Sociology

## **Name: William P. Smart**

**Specialty:** Program Management, Acquisition Management, Earned Value Management

**Contact Information:**

**Phone:** 256-955-2291 (DSN 645)

**Email:** bill.smart@mda.mil

**Project Management Experience:** Over 30 years

**Earned Value Management Experience:** Over 30 years

**Teaching Experience:** Over 25 years

**Career Highlights:** Mr. Smart is the Director of Program Management for the Missile Defense Agency's Terminal High Altitude Area Defense (THAAD) Project Office, serving as the senior manager and principal advisor to the Project Manager for all programmatic, acquisition and contracting functions for this \$12 billion dollar acquisition program. His professional career spans 32 years encompassing assignments with Army project offices, commodity commands and Program Executive Office (PEO) staff organizations; to include the U.S. Army Aviation and Missile Command (AMCOM), Huntsville, AL, the

Aviation and Troop Support Command (ATCOM), St Louis, MO; the Project Manager for Training Devices (STRICOM), Orlando, FL, the Sentry Project Office, U.S. Army Space and Missile Defense Command; the Joint Theater Missile Defense Program Office, and the Army Program Executive Office (PEO), Air, Space and Missile Defense. He has project and staff experience in budget and financial management, acquisition, source selection, manpower, program planning and oversight, acquisition program documentation/reporting and earned value management (EVM) for both major and non-major programs. As an EVM Review Team Chief, he defined the process and led the first Integrated Baseline Reviews (IBRs) for two ACAT 1D programs; which became the benchmark for DOD IBR policy, for which he was named a recipient of the David Packard Excellence in Acquisition Award given to the Integrated Program Management Initiative Joint Team in 1998.

**Professional Certifications:** Mr. Smart is a 1995 graduate of the Project Management Certification Program, University of Alabama-Huntsville, and a member of the Army Acquisition Corps with Level III certifications in Project Management and the Business, Cost Estimating, & Financial Management career areas. Inducted into the Military Order of Saint Barbara in 1998, his professional affiliations include being a founding member and Past President/Chapter Officer of the Project Management Institute (PMI), Huntsville, AL Chapter.

**Education:** Mr. Smart has a B.S.B.A. (Finance) from the University of Central Florida and a Masters in Management from the Florida Institute of Technology.

## **Name: J. Greg Smith**

**Specialty:** Program Control, Earned Value Management, Earned Value/Project Management Instruction

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**Mailing Address:** UTC1/S2845, 888 South 2000 East, Layton, UT 84015

**Project Management Experience:** Over 20 years

**Earned Value Management:** 17 years

**Teaching Experience:** 12 years

**Career Highlights:** Mr. Smith has over 20 years experience in the Business Management and Program Control fields. His involvement as a Program Control Manager and Analyst, Review Team Chief, and Earned Value Focal Point has given him a detailed insight into project management, performance measurement and project controls. As a Program Control Manager for Northrop Grumman he manages a workforce responsible for the Cost and Schedule associated with a multi-billion dollar division. His NASA and Humphreys & Associates Earned Value systems experience includes direct involvement with industry and government efforts in the implementation and operation of management systems throughout the United States. He was also the Program Control lead with NASA on various major programs, including the International Space Station and Space Shuttle. He currently lives in Utah with his wife and daughter.

**Professional Certifications:** N/A

**Education:** B.S. Nebraska Wesleyan University, M.S. Industrial/Organizational Psychology, Texas A&M University, M.B.A. University of Houston

## **Name: Randall K. Smith**

**Specialty:** Earned Value Management

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VA 22060-5565

**Project Management Experience:** 22 years

**Earned Value Management:** 20 years

**Teaching Experience:** 13 years

**Career Highlights:** Mr. Smith is a Professor of Financial Management at the Defense Acquisition University (formerly the Defense Systems Management College), where he has been teaching performance management and program control techniques since 1989. While his current focus is teaching the Advanced Program Management Course and providing consulting services, he has previously been the Director of the Contract Performance Measurement Course, and Department Chairman. Mr. Smith has also been a presenter at the annual International Performance Management Conference, has prepared several articles for publication, and is a Certified Management Accountant. Mr. Smith has also received formal training in consulting skills with the internationally known KPMG Peat Marwick, as well as at DAU. In addition to teaching, he has provided consulting services throughout the Federal Government, with recent clients including the Army (PM-OCSW, PM-Small Arms, PM-US MEADS), the Navy (PEO(A), PMS401 Photonics Mast, LPD-17), the Marine Corps (PM Joint Lightweight Howitzer), the Federal Aviation Administration (HQ Acquisition Directorate), and NOAA (NPOESS). These and related assignments have provided continued experiences in program management and production processes at a wide range of US and NATO contractors and government field activities.

**Professional Certifications:** Certified Management Accountant

**Education:** B.S. General Engineering: U.S. Military Academy, M.B.A. in (Business): Boston University.

## **Name: Paul Solomon**

**Specialty:** Earned Value Management Systems

**Contact Information:**

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**Project Management Experience:** N/A

**Earned Value Management:** N/A

**Teaching Experience:** N/A

**Career Highlights:** Paul Solomon manages Earned Value Management Systems (EVMS) in the Northrop Grumman Corporation, Integrated Systems sector. He was on the team that wrote the EVMS standard and received the DoD David Packard Excellence in Acquisition Award. He was a Visiting Scientist at the Software Engineering Institute where he wrote "Using CMMI to Improve EVM." He is co-authoring the book, "Performance-Based Earned Value<sup>®</sup>" to be published by the IEEE Computer Society/Wiley & Sons. Paul holds BA and MBA degrees from Dartmouth College and is a Project Management Professional.

**Professional Certifications:** Project Management Professional.

**Education:** BA and MBA degrees from Dartmouth College.

## **Name: Harry Sparrow**

**Specialty:** Project performance measurement, earned value systems design, development, implementation and training.

**Contact Information:**

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**Mailing Address:** 829 Chiles Avenue, St. Helena, CA 94574

**Project Management Experience:** 30+ years

**Earned Value Management:** 30+ years

**Teaching Experience:** 30+ years

**Career Highlights:** Harry Sparrow has over 35 years of project management experience. He has served as a management consultant to both private industry and government clients such as AgustaWestland, CH2MHill, Lucent Technologies, Northrop-Grumman, Westinghouse, Honeywell, Boeing, Xerox, MacDonald-Dettwiler, Illinois Power, Telephonics, Lawrence Livermore National Laboratory, Bio-Rad Laboratories and MK-Ferguson. He has been seminar leader for numerous public and in-house seminars addressing project management systems and has been guest lecturer for organizations such as the PMI, AFIT, NCMA, AACE and APICS. Harry is a former president of the Performance Management Association (now the Project Management Institute's College of Performance Management), an international non-profit professional organization dedicated to the discipline of project management and performance measurement, and an active member of the Project Management Institute. He is a member of the NDIA's Program Management Systems Committee. Harry is one of the named original authors of ANSI/EIA 748 (EVMS Guidelines) for which he was a recipient of the David Packard Excellence of Acquisition Award. He is also a named author/contributor to the PMI's EVMS Practice Standard and the DOD's Over Target Baseline (OTB) Handbook.

**Professional Certifications:** Recipient of the David Packard Excellence in Acquisition Award

**Education:** B.S. Engineering Physics, South Dakota State; M.S. Industrial Administration, Purdue University

## **Name: Dorothy Tiffany**

**Specialty:** Project management, earned value management, budgeting, and communications

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**Mailing Address:**

**Project Management Experience:**

**Earned Value Management:**

**Teaching Experience:**

**Career Highlights:** Dorothy Tiffany is the NASA EVM Program Executive and the PM Challenge Conference Project Manager in NASA's Office of Chief Engineer. She also holds the position of Deputy Chief of the Advanced Concepts and Formulation Office for Business Management at NASA's Goddard Space Flight Center. Ms. Tiffany is responsible for leading the Agency's implementation of Earned Value Management and for developing stronger project teams. She is a faculty member for the NASA Academy of Program/Project & Engineering Leadership in the fields of project management, earned value management, budgeting and effective communications. She previously managed the business operations of numerous large satellite development projects, including Calipso, POES, TRMM, and TDRS. She also directed GSFC's Financial Management Division and Accounting Branch, instituting major information system

reforms with the voucher examination and payment process. Ms. Tiffany was awarded two NASA Exceptional Achievement Medals and the NASA Exceptional Service Medal for her work in finance and project management and has been recognized for her efforts in mentoring and diversity. Ms. Tiffany is a member of PMI, the College of Performance Management, the Maryland Association of Certified Public Accountants, and the American Institute of Certified Public Accountants.

**Professional Certifications:** Certified Project Management Professional (PMP) and a Certified Public Accountant (CPA).

**Education:** M.S. in Project Management from Boston University, B.S. in Accounting from the University of Maryland and a Certificate in Technology Management from the California Institute of Technology (Caltech).

## **Name: David M. Treacy**

**Specialty:** Project Management and Work Breakdown Structures

**Contact Information:**

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**Mailing Address:**

**Project Management Experience:** 30 years

**Earned Value Management:** 20 years

**Teaching Experience:** 5 years

**Career Highlights:** 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 Force's 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 policies and regulations for project management as well as developing the Department's Earned Value Management System program.

**Professional Certifications:** Air Force Acquisition Corps

**Education:** B.S. Business Administration- '73

## **Name: Dennis W. White, MBA, PMP**

**Contact Information:**

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**Project Management Experience:** 25+ years

**Earned Value Management:** 25+ years

**Teaching Experience:** 20 years

**Career Highlights:** Mr. White is an independent consultant, recently retired from Robbins-Gioia, LLC. He has been involved with performance management training development and delivery. Mr. White has been a frequent speaker for PMI College of Performance Management and has always been active in policy formulation and development, first from the Government perspective then through the National Defense Industrial Association (NDIA). During prior assignments he supervised consulting

customer support for the development, implementation, and ultimate certification of Earned Value Management (EVM) Systems. Mr. White has served as primary advisor on all project management issues related to EVM in both the consulting role for various organizations and as a department manager with Rockwell International. As an Acquisition Program Management Officer in the U.S. Air Force, he held several positions in acquisition management. Mr. White specialized in Contractor Performance Measurement, and during the last part of his career was responsible for leading reviews of contractors' management control systems. He also spent two years as an instructor at the Air Force Systems Command's Systems Acquisition School.

**Professional Certifications:** Project Management Professional (PMP)

**Education:** B.S. Management Science/Mathematics: San Diego State University; M.B.A. (Information Systems Management), California State University-SB

## **Name: Marcus J. Williams**

**Specialty:** Scheduling and Financial Management

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**Mailing Address:** The Boeing Company, Everett, Washington

**Project Management Experience:** 20+ years

**Earned Value Experience:**

**Teaching Experience:**

**Career Highlights:** Marcus Williams has over 23 years of Scheduling and Financial Management experience with The Boeing Company. During that time he has been involved in the integrated scheduling and the program planning and budgeting functions, as well as in the development of planning and scheduling processes. He is currently a Senior Manager, Boeing Commercial Aircraft, Program Planning and Control (PP&C) responsible for Integrated Planning, Integrated Scheduling and Earned Value Management on the 787 Program in Everett, WA. He has membership on various Boeing teams striving for common processes and systems through The Boeing Company. Prior to his present position he was Manager, Integrated Defense Systems Home Office, Integrated Scheduling Skills Development, St. Louis, MO, which encompasses the creation, update and deployment of integrated scheduling training and the advancement and coordination of scheduling skills development across IDS and prior to this he was Manager of Integrated Scheduling for the IDS St. Louis Site's Aerospace Support organization which included the areas of Spares, Repairs and Retrofit and for Flight and Maintenance Training Operations. During his tenure in Aerospace Support he developed and assisted in the development of the Integrated Proposal Schedules for the Boeing, Joint Strike Fighter (JSF) Program, the C-130 Avionics Modernization Program (AMP), the E-3 Flight Crew Trainer (FCT) and the C-130 Aircrew Training System (ATS). He also was Scheduling Team Leader for the McDonnell Douglas/Northrop/British Aerospace/General Electric JSF Team and led the development of its Integrated Proposal Schedule.

**Professional Certifications:**

**Education:** Bachelor's Degree in Aviation Management from Embry-Riddle Aeronautical University, Daytona Beach, Florida, and MBA Degree from the Olin School of Business at Washington University in St. Louis, MO.

## **Name: Susan Wood**

**Specialty:** Requirements definition, source selection, integrated baseline reviews,

Earned Value execution and analyses

**Contact Information:**

**Phone:** 850-585-4830

**E-Mail:** swood@earnedvalue.biz

**Mailing Address:** 70 Serenity Circle, Defuniak Springs, FL 32433

**Project Management Experience:** Over 27

**Earned Value Management:** 21 years

**Teaching Experience:** 18 years

**Career Highlights:** Susan Wood is currently the PMI-CPM Executive Vice President and previously Vice President for Conference and Events. She was the North American PMI-CPM liaison to the Asia Pacific 2006 Symposium. Susan was also the Program Manager for the 23<sup>rd</sup> Annual PMI-CPM International Conference held in Clearwater Beach, Florida. Mrs. Wood has also served as Program Manager for the 15-18<sup>th</sup> International Integrated Program Management Conference co-sponsored by PMI-CPM, National Defense Industrial Association, and the Society of Cost Estimating and Analysis (US) and Co-Chair of the 1-3<sup>rd</sup> PMI-CPM EVM Japan Conferences. Mrs. Wood is also a senior partner at Earned Value Associates, LLC and owns Wood Consulting, specializing in all aspects of EVM. Susan retired in 2004 as the EVM Focal Point for the Air Armament Center (AAC) at Eglin Air Force Base, Florida, responsible for EVM policy, guidance and implementation support across all AAC programs. As a member of the Air Force (AF) Earned Value (EV) Integrated Product Team, Susan contributed to AF EV policy and implementation guidance. She has led and served on contractor and government EVM System Review teams and has developed and provided EVM training to government and contractor personnel for the past 18 years. Susan has over 27 year's government acquisition experience.

**Professional Certifications:** Extensive professional education

**Education:** BS in Accounting from Troy State University

## **Name: Jim Wrisley**

**Specialty:** Project management, earned value management, and scheduling

**Contact Information:**

**Phone:** 561-694-1646

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**Mailing Address:** 15 Via Verona, Palm Beach Gardens, FL 33418-3749

**Project Management Experience:** 27 years

**Earned Value Management:** 27 years

**Teaching Experience:** 27 years

**Career Highlights:** Mr. Wrisley has over 27 years of experience in project management. He has conducted independent assessments of project management systems for over 100 projects resulting in recommendations on how to strengthen the disciplines associated with baseline establishment, performance measurement, and baseline control. He has managed client engagements for the design, implementation and training of management processes in a wide variety of environments including telecommunications infrastructure, aerospace and defense, environmental restoration, energy research, and commercial projects. Many of these projects involved owner imposed process, system and reporting requirements, while others were driven by internal management's desire to integrate sound project management principles into their enterprise-wide management model. His depth and breadth of experience in the EVMS and predecessor requirements has made him a much sought after facilitator for the advancement of integrated project management processes. Mr. Wrisley is an active

member of the ADPA/NDIA Procurement Committee's Management Systems Subcommittee, the Performance Management Association, and the Project Management Institute.

**Professional Certifications:**

**Education:** B.A. Economics: Colgate University, M.B.A. (Candidate) Business: University of Minnesota.