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

Brian M. Evans, PMP, Principal – Executive Consulting Group, MCR, LLC

Dr. William Chadick, D.M., PMP, EVP, CSSBB – Executive Consulting Group, MCR, LLC

PS 01 - Critical Path Analysis for Management Reporting

We've all learned the critical path method for scheduling. We've been to PM Boot Camp or Scheduling 101 and learned about forward passes, backward passes, and slack. And yet we've also struggled to answer the question "What is our critical path?" in a way that satisfies levels of management from the project manager up to the executive sponsor. The truth of the matter is that real schedules are complex, often consisting of 5,000 or more tasks. The critical path can be defined in multiple ways and consists of hundreds or even thousands of tasks. The nuances of scheduling software add to the challenge.

In this presentation we'll explore an approach that bridges the gap between complex, detailed schedule data and the need to synthesize and communicate status to management stakeholders. Technical and analytical techniques are combined to focus project leaders' attention on mitigating the most pressing risks to progress along the critical path.

Joel Greenbaum, MITRE Corporation

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

Joel currently supports customers at the IRS and has also supported projects in a wide variety of private sector companies. In addition to schedule management, his expertise includes program management and strategy, and

automating tools for project management. Joel has an M.B.A. in Information Systems Management from The George Washington University and is a certified Project Management Professional (PMP).

PS 02 - Visualizing Cost and Duration Estimation using Earned Schedule

Although Earned Value (EV) measures have become standard in government agencies and industry to plan and track project performance, the traditional EV schedule performance measure, Schedule Performance Index (SPI), does not actually track schedule performance by measuring time itself, but uses dollars spent vs. planned as a proxy—thus it has inherent inaccuracies and inefficiencies which degrade tracking of actual schedule performance, and it is often misleading both early and late in the project schedule. In contrast, the newly emerging EV metric of Earned Schedule (ES) treats the project's schedule in the time domain, which simplifies the concept of schedule tracking, and provides a more meaningful indication of schedule performance. ES also facilitates forecasting the duration of the project, which has been difficult using traditional SPI. In addition, ES provides a mechanism to calculate more accurately cost Estimate At Completion (EAC), and opens the door to other analysis and estimation techniques. In this session, we provide an overview of Earned Schedule and related methods for project forecasting, and we explore a EV project management tool which enables users to visualize realistic project schedule performance; the tool facilitates both simulation of ES alternatives and visualization of project schedule tracking.

Sohei Okamoto, University of Nevada, Reno

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Sohei Okamoto has been involved in conceiving and developing web-enabled project management assessment, tracking and visualization techniques and tools under Navy Department research contracts in conjunction with the University of Nevada at Reno, the University of South Florida, and the Center for Program Transformation. His work has recently been focused on simulation and visualization techniques for EV. Sohei Okamoto received in 2005 his MS in Computer Science from University of Nevada, Reno on a topic dealing with automation of web processes. He is currently working towards his PhD degree in Computer Engineering (expected completion in 2010) and is totally immersed in research and development that involve project management, data visualization, and web-enabled software applications.

PS 03 - Implementing a Common Scheduling Methodology within a Program

The Federal Aviation Administration (FAA) has implanted a Corporate Work Plan using Primavera. The FAA Terminal Facilities organization is responsible for Air Traffic Control Tower construction, and is implementing a product-oriented Work Breakdown Structure (WBS) and associated schedule methodology. The product-oriented WBS and associated schedule methodology provide a common framework for project schedule status. The actual performance information is used to validate the cost estimating model for future Air Traffic Control Tower construction projects

This session is for individuals who are involved in scheduling or management within Federal Civilian Agencies or those who desire knowledge of some lessons learned while implementing a scheduling methodology for project tracking.

Brian M. Evans, PMP, Principal – Corporate Technical Directorate, MCR, LLC.

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

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

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

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

PS 04 - How Accurate is Your EVM?

In recent years we saw a dramatic increase in EV usage. As with any measuring tool we need to ask a question – how accurate is your EV system?

Most project managers would not be able to answer this question; however they spend a lot of their time and resources to establish and to run an EVM system. This paradox came about due to unquestioned acceptance of the EV as a prime project controls tool. However there are voices in the industry that start to question the current paradigm and the cost efficiency of EVM. This presentation attempts to contribute to this dialog.

Boris Blechman, PMP, Principal Consulting Manager, RobbinsGioia Inc.

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Boris Blechman has over 25 years experience of EVM, Scheduling and financial management experience in both the commercial and the government sectors. He is currently a scheduling manager at a large size DHS project. Boris has been responsible for developing and conducting program management and earned value management activities for over 20 years. His experience includes all phases of acquisition management from strategic planning through implementation for various construction and IT programs. His corporate experience includes developing and implementing program systems such as schedule, cost, risk, and earned value management. Boris Blechman is PMP and a member of the PMI and NDIA. Boris excelled at process improvement contributing to substantial schedule time and cost savings and received numerous awards. Boris is a EV SME and trains others in EVM and Scheduling techniques.

PS 05 - A New Look at Level of Effort Measurement

Abstract: There are various recognized methods for measuring program performance using Earned Value Management (EVM.) Common methods available to the PM include Weighted Milestones; Fixed Formula; Discreet Units; Percentage Complete and Level of Effort (LOE). The LOE method is traditionally applied to work that is considered so indefinable it cannot be measured and where passage of time defines accomplishment. Therefore, LOE is often used as a convenient placeholder for work that should be measured for progress. Budget for the Program Manager and his/her program oversight team's activities are typically characterized as LOE work, as well as administrative support work.

These activities are extremely important, if not critical, to the success of a program. After all, someone still needs to manage the program and answer the helpdesk emails. But what happens when work is planned and budgeted for but no work is accomplished? How does the PM account for the missing effort and/or personnel gap? More importantly, do the resulting LOE metrics provide an accurate and useful portrayal of the program's true progress?

This paper explores the appropriate application of LOE, recommends some techniques to measure work traditionally categorized as LOE, identifies the disadvantages of the established approach to LOE measurement of setting Budgeted Cost of Worked Performed (BCWP) to Budgeted Cost of Work Scheduled (BCWS) and suggests an innovative solution for improved measurement of LOE work.

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Kim Hunter, PMP, EVP, is a Professor of Earned Value Management at the Defense Acquisition University. She has over 20 years Capital Planning and Investment Control project management experience in both the federal government and private industry. Kim retired from the Marine Corps in 2003. While on active duty she served as a Contracting Officer Representative for the 4th largest contract in the Marine Corps and wrote several publications concerning Information Management, Command and Control and Administrative Operations. After retirement, she served as a Senior Project Manager for the Navy-Marine Corps Internet Project at the Quantico Network Operations Center, as a contractor in support of the Federal Aviation Administration, the Department of Labor and the Department of the Interior. In all of these positions she has served as a mentor and staunch proponent for EVM and project performance control. She holds a Master of Science in Technology Management from George Mason University and is CIO University certified.

PS 06 - Performing Statistical Analysis on Earned Value Data

Some Earned Value Methods, particularly those described in the equations on the DAU Gold Card, suffer from the shortcomings that they are backwards looking and do not allow for inferential or descriptive statistics. This leads to the propensity for these estimates to tail-chase as the CPI changes over time, meaning that the Estimate at Complete (EAC) for an over running program will systematically lag in predicting the overrun. Additionally, without quantified uncertainty measures, there is no method by which to perform risk analysis on these estimates without relying on subjective methods.

The purpose of this paper, winner of Best Paper in the EVM/Scheduling Track at the 2009 Society of Cost Estimating & Analysis National Conference, is to present a method by which statistical analysis techniques can be applied to Earned Value data to better predict the final cost of in-progress programs. EACs developed using statistical methods make a prediction of the final CPI and thus do not tail-chase. Additionally, the descriptive statistics developed as a byproduct of the method allow uncertainty to be quantified for risk analysis purposes.

For demonstration, the method will be applied to a set of representative data. The paper will continue with an example of the paradigm shift this type of analysis caused when it was implemented across a production facility. The conclusion will discuss the recommended process and types of data needed to implement this type of analysis.

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Eric Druker graduated from the College of William and Mary with a B.S. in Applied Mathematics in 2005 concentrating in both Operations Research and Probability & Statistics with a minor in Economics. He is employed by Booz Allen Hamilton as a Senior Consultant and currently serves on the St. Louis Society of Cost Estimating & Analysis (SCEA) Chapter's Board of Directors. In 2009, he was named SCEA's National Estimator/Analyst of the Year for Technical Achievement. Mr Druker currently supports NASA's Cost Analysis Division, performing joint cost & schedule risk analysis across a variety of projects. In addition to multiple SCEA conferences, Eric has been an invited presenter at The Naval Postgraduate School's Acquisition Research Symposium, DoDCAS and the NASA PM Challenge. Prior to coming to Booz Allen, he helped to develop Northrop Grumman's Independent Cost Evaluation (ICE) risk analysis practices and served as lead author of the Regression and Cost/Schedule Risk modules for the 2008 Cost Estimating Body of Knowledge (CEBoK) update.

PS 07 - Anchoring EVM Analysis Approaches in the GAO Guide

The growing size and complexity of Defense programs and a higher level of awareness of uncertainty places an ever-increasing emphasis on the integration of risk, earned value, cost, technical performance and schedule in the Acquisition community and creates the need for new communication tools for program managers. The US Department of Defense and related Federal organizations have updated several guidance documents and policies to encourage this integration, the latest evidence being the March 2009 release of the **GAO Cost Estimating and Assessment Guide: Best Practices for Developing and Managing Capital Program Costs**. This landmark guide places a significant amount of space dedicated to the role played by Earned Value Management (EVM), as well as other key program management disciplines.

The GAO guide contains a wealth of information for an EVM analyst and can help point the way to hard-hitting, probing analysis. This presentation will show how key quantifiable program management disciplines such as cost estimating, risk management, EVM, scheduling and system engineering can be linked together by the EVM analyst in ways to answer key questions for the program manager.

Participants in this seminar should come out of the presentation with several “takeaways,” chief among them being (1) the value of an interdisciplinary approach to EVM analysis and the (2) potential for March 2009 GAO guide to be a powerful asset to the analyst and cost estimator.

Patrick K. Barker

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

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

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

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

**PS 08 - “What does the Pentagon do with our Earned Value Data?” –
Anonymous Defense Contractor**

This presentation describes how the Department of Defense's Acquisition, Technology and Logistics (AT&L) organization is making Earned Value (EV) Data available to its decision makers and analysts. It describes the Acquisition Visibility Service Oriented Architecture (AV SOA) project, which provides access to 148 data elements, including 70 EV data elements from Contract Performance Reports submitted by DoD contractors and from DoD Program Offices for 103 Major Defense Acquisition Programs (MDAPs). It describes the concept of Service Oriented Architecture (SOA), and the technical aspects and issues of the SOA portal, including architecture, tools, and testing. It also describes the types of EV data being presented, data issues encountered, and solutions developed to resolve those issues. All Contractors and DoD employees interested in how EV data is presented at the Pentagon should attend.

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Patricia Lothrop is a Senior Systems Engineer at the Office of Secretary of Defense (OSD) Acquisition, Technology and Logistics (AT&L) Acquisition Visibility Service Oriented Architecture (AV SOA) program. She is a recognized Facebook user, wine connoisseur, fan of everything in Charleston, SC, cat owner, and gardener.

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John Acton is a Senior Managing Consultant at IBM Global Business Services. He is a recognized Earned Value expert with over twenty years' experience inside the Government (working for a Major Defense Acquisition Program) and outside (implementing EV for IBM, a major Federal and Defense contractor. His credentials include: Certified Public Accountant, Project Management Professional, and Earned Value Professional designations. He is DAWIA Level III certified in Program Management and Contracting.

PS 09 - Government Program Level EVMS and Scalable Reporting in the FAA

Effective development and use of an Earned Value Management System (EVMS) in a government Program Office presents several unique challenges. Not only must the EVMS be able to collect and process information for all activities and participating organizations contributing to the investment objectives, but it also must be able to roll up the data to meet varying reporting requirements, including the recently created OMB IT Dashboard. This presentation will focus on how the FAA Next Generation Air/Ground Communications (NEXCOM) Program Office uses Deltek Cobra and wInsight to manage 100% of the investment, proactively monitoring scope, schedule and cost on a monthly basis. NEXCOM is a complex program replacing the controller-to-pilot voice communications system by deploying over 60,000 radios at 3,000 locations over 25 years. The EVMS reports clear and accurate EVM data to all relevant stakeholders, from EVM Analysts and CAMs to Program Managers and Agency/Department Executives and on to OMB for the Exhibit 300 and the publicly available IT Dashboard. The EVMS is capable of scaling the level of reporting detail to match the appropriate users' interest. The NEXCOM program management system and architecture will also be discussed, including the software tools and integration levels necessary to provide accurate, timely, and actionable information vital to effective program management.

Dieter Thigpen, PMP, Federal Aviation Administration

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Dieter Thigpen is the FAA Program Manager for the Air/Ground Communications Solution Implementation group and has over 18 years of Project Management experience. He is responsible for all FAA Air/Ground Communications programs sustaining the radio infrastructure for controller-to-pilot voice communications systems. Mr. Thigpen is responsible for the Next Generation Air/Ground Communications (NEXCOM) program which replaces the aging and inadequate controller-to-pilot voice communications system, with a state-of-the-art communications system. The NEXCOM program will safely sustain the crucial air traffic control communications infrastructure and will address the impending shortage of communications spectrum. Mr. Thigpen is well versed in the use of Earned Value Management and its use to provide a comprehensive and integrated approach to performance management for programs in excess of \$50M annually.

Mr. Thigpen began his career with General Electric and has over 20 years of Federal Government experience. Mr. Thigpen is certified as a Project Management Professional by the Project Management Institute and holds the FAC-P/PM Senior/Expert level certification from the Federal Acquisition Institute.

Matthew Schneble, KM Systems Group

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Matthew Schneble has over 18 years experience in project management, software development, product management, and professional services in both the commercial and Government sectors. Currently, as Managing Director for KM Systems Group, he has provided consulting services for implementing applications and managing engagements for project management, earned value management, and performance reporting. Mr. Schneble is the team lead for program management and earned value management support on federal government major systems acquisitions programs. He has designed and implemented Earned Value Management Systems to track cost, schedule, and technical performance goals for federal government major systems acquisitions, including FAA NAS modernization programs.

Mr. Schneble has served as program manager for multiple large Information Technology development projects with responsibilities that include software development, system integration, and product development in the areas of project management, image analysis, business intelligence, system security, network solutions, disaster recover, and data center

products. Mr. Schneble has a Master of Science in Electrical Engineering from The University of Texas. He has achieved the Graduate Certificate, EVM, from the Project Management Institute College of Performance Management.

PS 10 – Integrated Baseline Review – Back into the Process

Establishing, managing and controlling the Integrated Program Baseline is a key responsibility for Program Managers. Integrated Baseline Reviews (IBRs) are therefore critical processes to assist Program Managers in fulfilling this pivotal responsibility. Properly executed IBRs and monthly reviews of Earned Value Management (EVM) data, in addition to program metrics, are essential elements of a Program Manager's risk management approach. Information generated from IBRs is used to establish, monitor, and assess the program throughout its acquisition lifecycle. It is used to assess whether the program is executable and/or determine the level of confidence that the program will achieve mission success. Frequently, many IBRs have evolved into a "box check" process with an emphasis on in-plant CAM interviews and limited preparation by the government program office team. It is crucial to understand that an IBR is a process, not an event.

Attendees will benefit from the IBR "best practice" processes which have been implemented at the Air Force Space and Missile Systems Center (SMC), Los Angeles AFB, CA since 2008. IBRs for major acquisition programs are meticulously planned with extensive analyses of documentation - including the IMS before the CAM interviews. Multi-phased IBRs are carried out in order to identify, assess, handle, and monitor all integrated program baseline risks (i.e., technical, cost, schedule, resources, and management processes) once the integrated baselines are established.

Nhung Tran, USAF, Space and Missile Systems Center (SMC) **Program Assessment Chief**

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Nhung Tran is Chief of Program Assessment at SMC, Los Angeles AFB, and has 25 years of Engineering Management, Program Integration, Program Management, Business Operations, and EVMS implementation experience. Ms. Tran has led and managed Government teams to execute and/or support IBRs for numerous DoD and non-DoD acquisition programs.

Prior to joining SMC in 2007, Ms. Tran began her civil service career with Defense Contract Management Agency (then named the Defense Contract Management Services) in 1984. Among various assignments within DCMA, she was the Project Engineer and Program Integrator for the Defense Support Program, Program Integrator and EVM monitor for the NASA AMSU-A Program, Lead Program Integrator for the National Missile Defense Program, Lead System Program Integrator and EVMS for the Future Combat System Program, and EVM Specialist for DCMA EVM Center. Nhung currently provides integrated program management internal consulting and application training to acquisition Wings at SMC, Los Angeles AFB. Nhung holds a B.S. degree in Chemical Engineering from Cal Poly, Pomona, CA.

PS 11 - Rolling Wave Planning in a Fiscal Year Contract Environment

How do you convince your Program Manager that Earned Value is useful on contracts with a period of performance that only covers a fiscal year with follow on annual options? We will discuss some options you need to consider with rolling wave planning when used in an annual contract award environment. The unique challenges of the statement of work, length of work packages and other parameters will be discussed with lessons learned to improve program status and change control.

Tim Wallender, CFP, Wallender & Associates

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Tim Wallender is the founder of Wallender & Associates, a firm specializing in earned value management, scheduling, and cost control systems. Mr. Wallender has over 28 years of hands-on experience with earned value management implementation using numerous software packages. Tim is a past President of the Project Management Institute Los Angeles Chapter with over 1100 members.

Mr. Wallender previously worked as project manager for MILSTAR and other National satellite programs, and as manager of Cost/Schedule Control Systems Criteria (C/SCSC) at the Northrop B-2 division. While at Northrop, he was responsible

for rewriting the C/SCSC system description, internal surveillance, training, and subcontractor flowdown. Prior to the B-2 program, he worked at Hughes Aircraft Company's Missile Systems Group. There, he re-wrote the multi-group Hughes C/SCSC system description for internal coordination and provided training for cost account managers.

Mr. Wallender is a retired Air Force officer. He was a C/SCSC review director in the Air Force. He authored the first Air Force policy on conducting Integrated Baseline Reviews (IBRs) and the Guide to Analysis of Contractor Cost Data. Mr. Wallender received his BS from the U.S. Air Force Academy and is a Certified Financial Planner.

PS 12 - Budget v. Funding

The concept of budget dollars differentiated from funding dollars is a simple one, yet one that many on project teams don't fully understand. The misapplication of funding issues into planning the PMB has caused problems throughout many EVMS implementations. In this session, attendees will be provided with the fundamental differences and their importance as well as common problems found when these distinctions are not fully understood by contracts or project personnel.

Eva Walter, PMP, Earned Value Advisors, Inc.

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Eva Walter has almost 20 years experience in program and project management. She started her career as a software product manager for software engineering and middleware applications. She co-authored the *Guide to the ASP Delivery Model*, a best practices guide for the Application Service Provider Industry Consortium (ASPIC). She was Project Controls Manager and then Program Manager for a \$15 billion ceiling contract, through which she managed a number of support and services projects. Eva has supported many EVMS implementation projects using various toolsets and specializes in providing EVMS consulting and client support in the areas of tools implementation, process design, documentation, and customized training.

Eva is a certified PMP and also holds the designation of Microsoft Certified Professional (MCP) in Enterprise Project Management (EPM). She actively participates as a volunteer for PMI's Washington DC Chapter.

PS 13 - Responding to Government RFPs that have EVMS Requirements

The number of government Requests for Proposals (RFPs) that require ANSI/EIA 748 compliant management has increased. Companies that don't have a compliant Earned Value Management System (EVMS) are not prohibited from bidding, but they must submit a compliance plan that meets FAR 52.234-4 or DFARS 252.242.7001. Many of the "stimulus fund" grants under the American Recovery and Reinvestment Act (ARRA) also require EVM. Kelly Meassick of Charter Performance Management Group will discuss the components of the EVMS Compliance Plan and the artifacts needed to support an EVMS-compliant proposal submission (i.e. WBS, OBS, RAM, IMP, IMS). Kelly will also share EVMS Implementation Lessons Learned from a variety of clients with differing company cultures, EVMS goals and customer expectations.

This session will include developing an EVMS-compliant response, the EVMS Compliance Plan, lessons learned, set your own implementation pace.

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

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

PS 14 - MAXIMIZING REQUIREMENTS IN RFPs:
One Size Does Not Fit All

Many of us in the Performing Contractor World have received an RFP that contains unclear, confusing, or potentially superfluous Earned Value Management requirements. Many of us in the Government Contracting World have issued an RFP, which contains unclear, confusing, or potentially superfluous Earned Value Management requirements.

We (Contractors) often find ourselves in the untenable position of responding to the RFP with vague language or perhaps "boilerplate" language that isn't relevant to the scope of work or contract type. There may be times during proposal development that we fail to respond to the EVM Requirements due to a lack of understanding of the impact during execution, and suffer dire consequences post contract award when we don't have the infrastructure or program office to support an earned value contract. Smaller contractors who do not have DCMA-validated EVM Systems may not respond at all, because the language found within the RFP leads them to believe they are unqualified to perform the seemingly required level of project management.

This practice symposium will discuss ideas for Government Contracting Officers to structure their RFP EVM Requirements in a way to ensure a positive return on investment for the Government. We will also discuss this topic from the Contractor perspective related to how to wade through the requirements and how to pose clarifying questions to ensure a fully compliant and meaningful response.

Lisa D. Matas ,EVP, PMP

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

Lisa is a frequent speaker and trainer of Earned Value Project Management (EVPM) topics. She has served as a guest lecturer for graduate students at Bowie State University in Maryland, as well as a course leader for the American Management Association. Prior to her tenure with Booz Allen, Lisa worked for such major defense contractors as Raytheon and Northrop Grumman. Lisa presently serves on the AACEI Education Board and the PMI-CPM Awards Advisory Committee.

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

Cheryl Johnson, EVP, PMP

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Cheryl Johnson is a certified Project Management Professional (PMP) and Earned Value Professional (EVP), and has more than 20 years of experience in Project Management and Controls. Ms. Johnson specializes in project management training, integrated baseline review design, and execution, earned value management tools and techniques, risk management, and integrated scheduling concept and application. Ms. Johnson is well versed in both theory and technical PM software applications.

Ms. Johnson has developed a sterling and lasting reputation in the project management industry and within Booz Allen as one of the premier experts in Earned Value Management (EVM). Ms. Johnson was the seventh professional in the United States to earn the prestigious Earned Value Professional (EVP) certification from the Association for the Advancement of Cost Engineering (AACE). The EVP recognizes competency in the development and implementation of earned value management systems. Ms. Johnson was one of the core authors of the 8-hour intensive EVP exam. Ms. Johnson is a published author, and her full length article on Earned Value Management best practices was published in the NCMA Magazine, April 2006 Issue.

Ms. Johnson's has demonstrated her project management competence by creating and teaching a 3-Day intense Risk Management course at the University of Wisconsin at Madison's Executive Education Center in the School of Business. Her affiliation with the University of Wisconsin exemplifies her commitment to education and training for quantitative management control activities.

Ms. Johnson is a 2009 Women of Color in Technology recipient selected to receive the *Career Achievement award!* With this significant achievement, Ms. Johnson will have an opportunity to gain national recognition during the 2009 WOC Awards conference on October 29-31 in Dallas, TX. The award recognizes women of color who have made significant achievements in engineering, science, or technology field in industry or government. The panel looks at the body of work of the nominee; the broad social and economic impact of the career, and the nominee's performance as a role model and mentor for minorities in technology.

PS 15 - Building a Credible Performance Measurement Baseline in the Presence of DCMA's 14 Point Assessment

The Performance Measurement Baseline (PMB) is a time-phased network of schedule activities describing the work to be performed, the budgeted cost for this work, the organizational elements that produce the deliverables from this work, and the performance measures showing this work is proceeding according to plan. This baseline consists of three baselines – technical, cost, and schedule.

With the addition of DCMA's 14 Point Assessment of the Integrated Master Plan / Integrated Master Schedule and DCMA's Pass/Fail approach to EVMS surveillance, it becomes critically important to not only pass the surveillance but to recover your investment in to the form of a Credible Performance Baseline used to successfully manage the program. Using every firm's the Earned Value Management Systems – System Description, the raw materials of the PMB are Work Packages (WP).

The PMB is the baseline of the cost, schedule, and deliverables for each Work Package in the plan. The sequence of completed deliverables describes the increasing maturity of the capabilities produced by the project. Constructing the PMB depends on knowledge of the business requirements, skill in developing the WPs that produce the deliverables for these requirements, and discipline in assembling the cost, schedule, and relationships between the WPs. It is this discipline that requires the most focus for the planners and project controls staff. Without this discipline, the development of a credible baseline is simply not possible.

In the end, the planners and project controls staff must "know" in intimate detail each WP, its deliverables and resource requirements, the performance measurement criteria, and the dependencies that form the critical path through the project schedule – this is called *Metrics Based Scheduling*. (DACS 2007).

Gaining this knowledge about the program starts by asking and then answering the following questions:

- What are the deliverables and what are the units of measure of progress to plan for these deliverables?
- What are these deliverables worth to the customer and is this value in line with what the customer has paid for?
- What system capabilities are provided by the deliverables and how does their associated value fulfill the requirements of the business plan?
- How will we recognize the increasing maturity of these deliverables beyond the simple compliance of the DCMA 14 points and the use of Earned Value to report CPI/SPI metrics?

This workshop presents an approach to building the PMB, gaining 14 Point Compliance, while establishing the foundation for the PMB that provides actionable information to the program manager.

Connecting each process in the construction of the PMB is guided by the Systems Engineer paradigm of: (a) increasing cohesion (data and process integrity) of the individual components, (b) while reducing coupling (undesirable dependencies).

The development of the PMB is a critical success factor for any large complex program. Without a credible PMB that describes the increasing maturity of the deliverables, the contractor and the customer have no way to determine the project's programmatic performance. The participants cannot identify what "done" looks like. They cannot possess the information needed to forecast when the project will complete, what the cost will be at completion, and the confidence that the delivered products or services will deliver the mission capabilities.

Glen Alleman

Lewis and Fowler, VP Program Planning and Controls

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

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

PS 16 - A Global and Cross-Industry Perspective on Current EVM Practice

The objective of this presentation is to provide better understanding of the current practice of EVM usage, practice standards, and related professional services across different industry sectors and geographic regions. This is in response to the truly remarkable growth of EVM as a best practice for performance management in both government agencies and private industries.

The survey involved in this study provides a cross-sectional view of the most current EVM practice based on the experience and knowledge of more than six hundred project-management practitioners participated in the survey. EVM users are classified into groups according to industry sector, motivation for EVM usage, organization role, and geographic location. Their EVM practice is compared in terms of the business environment surrounding EVM application, its implementation and usage, and its contributions to project outcomes, barriers that hinder its use, as well as critical success factors for EVM implementation. The user classification scheme and the broader review of EVM practice are expected to provide practitioners with a holistic view of the current status of EVM practice.

The presentation will discuss the following major areas: (1) Comparison of the current EVM practice in different industry sectors and countries; (2) Issues that hinder the acceptance and usage of EVM; (3) Practitioners' perceptions of EVM contribution to project outcomes; (4) Critical success factors for EVM implementation.

This study was funded by Project Management Institute (PMI) and PMI's College of Performance Management (CPM) during 2008 and 2009.

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Dr. Lingguang Song is an Assistant Professor of Construction Management at the University of Houston. He teaches construction management, scheduling, quality management, and computer applications at the undergraduate and graduate levels. His primary research interests include project planning and control, process simulation and visualization, productivity measurement and improvement, lean construction, and IT applications in project management. For more than ten years, he has been involved in research funded by various grants from Project Management Institute, U.S. Department of Commerce, National Science and Engineering Research Council of Canada, and several construction companies. He has published more than 25 journal and conference papers on his research in the area of construction project management. He is the winner of the 2009 *Best Paper Award of the Journal of Management in Engineering* from the American Society of Civil Engineers (ASCE).

PS 17 - Using EVM and ITIL Together to Better Manage Enterprise-wide IT Services

This presentation will discuss the differences between project management using EVM and service management using the ITIL framework. It will then suggest a method for combining the best aspects of both in a single management system that can be efficiently applied to major mixed life-cycle IT programs.

Federal IT managers are expected to deliver IT projects and services using industry best practice management approaches, which include EVM and ITIL. These approaches are traditionally segregated, with EVM used to manage development contracts while ITIL is applied to O&M contracts. Where development and O&M services are provided on the same contract there can be disagreement over which approach is the most applicable. Ideally, a manager would be able to apply either framework as needed to support the program. This presentation suggests a method for supporting both management approaches simultaneously in a way that is simple to execute and inexpensive to operate.

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Eric Christoph, PMP, EVP, is the Director of the Center for Performance Management at L-3 Enterprise IT Solutions (EITS). L-3 EITS is a division of L-3 Communications Corporation (L-3), a leading provider of high-technology products, services, systems, and sub-systems, with over 64,000 employees, and reported 2008 sales of \$14.9 billion. EITS specializes in providing IT service management solutions to Federal, State, and local government organizations. The Center provides consulting on project planning and controls to L-3 business units. The Center also administers an ANSI-748 Earned Value Management System for use by programs throughout L-3. Mr. Christoph is one of approximately 200 Earned Value Professionals certified by the Association for the Advancement of Cost Engineering, and was one of the contributors to PMI's 2005 Practice Standard for EVM. He also represents L-3 on the National Defense Industrial Association's Program Management Systems Committee, where he serves on the EVM for Services working group. Mr. Christoph can be reached at eric.christoph@L-3com.com.

PS-18 - EVMS Adoption Challenges: How to Avoid or Overcome Them

The end goal of an EVMS implementation is to have the carefully (and sometimes painfully) designed project management framework (people, processes, and use of technology) become institutionalized in the organization so that the discipline required to effectively manage programs using earned value management becomes second nature to the teams implementing it. However, most organizations struggle with the post-implementation/pre-institutionalization phase known as the adoption phase. In this presentation, common challenges that organizations face during the EVMS adoption phase are presented with tips and tricks of avoiding or overcoming them.

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Candi Randolph is co-founder of Charter Performance Management Group and has over 20 years of Project Management and EVMS implementation experience. Candi began her career in the Aerospace and Defense industry where she was the Project Manager and lead engineer for the design, development and implementation of a custom EVMS used on many large aerospace and defense programs. In 1996, Candi began a 10-year consulting engagement with the Defense Finance and Accounting Service in Indianapolis where she managed large-scale IT programs. She currently provides EVMS and project management consulting and training services. Candi holds a B.S. degree in Computer Science and the Project Management Professional (PMP) credential.

PS 19 - EAC Best Practice

NAVAIR's comprehensive EAC process involves many levels of the organization to help improve accuracy and quality of our estimates. This process is not a strictly a Parametric or Statistical estimate. This estimating process is combining EVM, Programmatic and Technical inputs and verifying through a review board.

EVM Trend indicators are a key component to providing a basis when updating the Independent EAC. NAVAIR has always consulted with the technical community to ensure the risk has been captured. The ever changing technical requirements, DOD budgets and the rotation of personnel in key technical areas has created a need to have Senior level reviews to ensure the baseline and cost estimates represent the baseline for a DOD acquisition. NAVAIR is seeking to ensure a unified Command position on estimates and IBRs through collaboration with the technical community and by obtaining concurrence at all levels. The Engineering Technical Assurance Board (ETAB) was created to seek the unified position.

The EAC process begins with a POA&M outlining the steps needed for an EAC update. Key POA&M milestones are reviewing the EVM (CPR and IMS) trend data, planning conduction a Schedule Risk Assessment (SRA), reviewing the LRE with the contractor, developing a cost model, scheduling time to review LRE assumptions with the Government IPTs, developing three point estimates, running Monte Carlo simulations and briefing the EAC results. NAVAIR uses the EAC results to identify potential cost risks and allows the Program Manager to mitigate future pressures.

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Andrea Mozzo is the Integrated Project Management Deputy Branch Head for the NAVAIR PEO ASW and Special Missions Branch. She has nine years of experience with the Department of the Navy- two years as a cost analyst for the Naval Center for Cost Analysis, four years as a cost team lead for the NAVAIR Cost Department, and three years as an IPM team lead with the NAVAIR Cost Department. Andrea has mainly been involved with SDD and Production efforts to include MH-60S, E-2D Advanced Hawkeye, E-2C Greyhound, Joint Strike Fighter, and CH-53K Heavy Lift. While in the IPM division, Andrea has developed two Comprehensive EACs and led quarterly Schedule Risk Assessments. Andrea just finished an Integrated Baseline Review for the CH-53K program. Andrea received her B.A in Mathematics from West Virginia University and is presently working towards an M.S in Management from Florida Institute of Technology. Level III DAWIA Certification in Budget, Cost Estimating and Financial Management.

PS 20 - NAVAIR SRA Process

NAVAIR's presentation on a Schedule Risk Assessment (SRA) summarizes a process which uses statistical techniques to identify technical, programmatic and schedule risk in a program and quantifies the time impact of those risks on the program's schedule. Program schedules typically only show what will happen in the program if everything goes according to plan. All programs contain some unknown risk and uncertainty. A Schedule Risk Assessment provides a means to identify and then quantify risk in a project and determine a range of probability if the risks are not mitigated. The SRA measures the technical risks in terms of remaining duration associated with schedule delays, resource challenges, and improper or inadequate schedule construction.

Since all programs contain risk and uncertainty, the SRA helps quantify the risk in a project, and allows the program manager determine the extent of any impact. It is important for the Program Manager and Integrated Product Team leader to realize the added value an SRA can bring to the technical, cost and schedule management decisions they make every day.

This process also provides key inputs to the development of an Estimate at Completion.

In most cases and especially on new contracts, the Integrated Master Schedule Contract Data Requirements List (CDRL) mandates that the contractor will periodically actively participate in a government lead SRA.

EILEEN LANG, NAVAIR, Scheduling Process Owner

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As the process owner for Scheduling, Ms. Lang is responsible for developing and maintaining processes, toolkits, and training as well as ensuring the quality of products produced with respect to Schedule Development and Analysis. Prior to her current position, Ms. Lang has held various positions within NAVAIR's Cost Department including Schedule and EVM analyst, Schedule Process Group Subject Matter Expert (SME) and EVM Branch Head position. Prior to joining NAVAIR, Ms. Lang was employed with a Defense Contractor providing scheduling and earned value support. Ms. Lang has seventeen years of experience in scheduling and earned value management. Ms. Lang received her Bachelor of Science in Technology & Management from University of Maryland.

PS 21 - EARNED VALUE IN SOFTWARE

This presentation will explore the use of software metrics and measures for Earned Value Management of software intensive systems. For more and more government procured systems, software development will consume the majority of resources, schedule and cost while generating the bulk of program risk. Earned Value Management (EVM) can be significant tool for Program Managers in helping to identify and mitigate cost, schedule and technical risk associated with software development. However, the application of EVM to software intensive projects has unique challenges relative to its application to hardware development. Based on NAVAIR'S "Using Software Metrics & Measurements for Earned Value Toolkit", this talk discusses some of the current issues and challenges using EVM for software development and evaluates commonly used software measures in terms of effectiveness as an EVM measure. Practical solutions for addressing rework and the Work Breakdown Structure are also provided. The talk presents scenarios and examples to clarify the concepts.

Brenda Bizier, NAVAIR

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As the process owner for Earned Value Management (EVM) Analysis, Ms. Bizier is responsible for developing and maintaining processes, toolkits, and training as well as ensuring the quality of products produced with respect to IPM analysis. Prior to her current position, Ms. Bizier has held various positions within NAVAIR's Cost Department including cost and EVM analyst, EVM Team Lead and several EVM Branch Head positions providing a broad range of cost estimating and program performance related experience on a significant number of the Command's major and non-major contracts. Ms. Bizier's non-DoD experience includes over seven years of Cost Analysis support to the United States Postal Service and nearly three years of Customer Risk Analysis for a U.K. based Savings and Loan. Ms. Bizier received Master's of Business Administration from Virginia Polytechnic Institute and her Bachelor's of Arts from the University of Virginia. Level III DAWIA Certification in Budget, Cost Estimating and Financial Management.

PS 22 - Assessment of Project Control Processes for Successful Earned Value reporting

This session provides guidance for implementing sound project control processes. The principles and methodologies that are introduced in this session are representative of Federal and Industry best practices.

The DoD has instituted regulations and guidelines that focus on the continual measurement of contract performance in achieving project success. With the MIL-HDBK-881A, DoD 5000.2 Series, CWBS DID (DID number DI-MGMT-81334C) and ANSI/EIA-748B standards, the Government has outlined the importance of using best practices in project management and performance measurement to ensure delivery of products and services within budget and schedule constraints. To measure project performance, the use of Earned Value Management (EVM) is highly recommended. EVM integrates cost, schedule, and project scope to objectively measure project progress and determine end costs and duration.

While using EVM is the end state for performance management, there are several **project control processes** that must be implemented in order to satisfy EVM requirements as identified in the ANSI/EIA-748B standards. In addition, with the growing requirement of EVM it is critical for portfolios, programs, and projects to implement necessary project controls to ensure baseline management. These project control elements include an integration of a product-oriented work breakdown structure, integrated master schedule, work packages and project management processes such as risk management, baseline change control, and cost estimating.

Project controls ensure that project requirements are defined, time phased, budgeted, and managed. An initial assessment of project management processes will allow for the understanding of a program's performance measurement capabilities. The assessment results will identify program needs and support formulation of the project control processes.

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Mr. Darrell McGraw is certified program management professional (PMP) and schedule management professional (PMI-SP) with over twelve years of program management expertise in the areas of project controls, earned value management, risk management, and integrated master scheduling. He has been instrumental in supporting Department of Defense agencies (e.g Defense Information System Agency -DISA, and Defense Advanced Research Projects Agency - DARPA) in implementing tailored and ANSI standard earned value management processes and procedures. Mr. McGraw has led multiple training sessions for DISA senior leaders instructing them on best practices in project management and performance measurement to ensure the delivery of products and services within budget and schedule constraints. Mr. McGraw also co-authored the DISA Project Control implementation guide. Mr. McGraw is currently a senior associate at Booz Allen Hamilton and holds a BA in Economics from the University of Maryland at College Park and a MS in Informations Systems Technology from George Washington University.

PS 23 - Emerging Earned Value Management Technique: Earned Schedule

Earned Schedule, a methodology created by Walt Lipke, is an emerging practice for projects performing ANSI-748-compliant Earned Value Management, and is sited in the latest DoD Guide to Analysis of EVM and Cost Data. Although calculating Earned Schedule requires no data above and beyond what is necessary for ANSI-compliant EVM, it delivers a new metric, in days and dates rather than in dollars and percentages. The technique provides a new perspective for schedule analysis because uses performance trends to forecast task and project duration. Earned Schedule is a useful supplement to Critical Path Method scheduling, because it provides an independent estimate of the completion date, which can be used to assess the risk of the current planned date. This workshop will provide an introduction to the Earned Schedule technique, provide two case studies of its application, and instructions/resources for implementing Earned Schedule on your project.

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Ms. Jones, a certified Earned Value Professional, brings ten years of experience in project management, including scheduling, earned value management, acquisitions, and risk management. She has set up and maintained, and evaluated earned value management systems at the project and agency level, developed solicitation documentation and conducted source selections, and performed financial and project management process analysis for a wide range of government agencies. She has implemented earned value management for clients including Environmental Protection Agency, General Services Administration, and Office of the Comptroller of Currency.

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Mr. Meyer brings two years of Project Management experience including scheduling, Earned Value Management, and acquisitions. He has maintained and analyzed the Earned Value and Integrated Master Schedule data from multiple acquisition projects in the United States Coast Guard while helping the Coast Guard develop and mature the way Earned Value is utilized in the agency as a project management tool. Mr. Meyer is the lead analyst of multiple high profile Coast Guard projects and helps ensure that the contractors are delivering assets to the Coast Guard that are on time, on schedule and on scope.

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Mr. Flanagan has two years of professional experience implementing Earned Value Management and performing project scheduling. Mr. Flanagan currently supports an EVM implementation at the Environmental Protection Agency, maintaining the integrated master schedule and delivering earned value management status reports. He played a key role in developing the performance measurement baseline and in analyzing project health and contractor

PS 24 - Case Study: Implementation on an Earned Value Contract

Overview

Large-scale EVMS Programs often include contractual requirements for the IMP and the IMS. Integrated Master Plan (IMP) method is a structured technique for decomposing project scope into contractually binding events and accomplishments, and utilizing specific criteria to assess the completeness of these accomplishments and the Integrated

Master schedule (IMS) provides the time phasing of the IMP information. This presentation will provide an overview of the IMP/IMS concept and lessons learned when implementing the IMP/IMS on an earned value contract.

Topics of Discussion

The IMP/IMS approach has been gaining recognition as a means of organizing projects for its ability to facilitate synergies between solicitation documents, contractual documents, and other project management artifacts in project execution. It is becoming more common for major acquisition solicitations to require implementation of the IMP/IMS discipline. In these cases, the IMP/IMS approach permeates all aspects of the management of the project and presents implications for the implementation of other project management tools, such as the Work Breakdown Structure (WBS) and Earned Value Management System (EVMS).

The objective of this discussion is to provide an overview of the process of implementing the IMP/IMS approach from contract solicitation throughout execution, with an emphasis on the benefits and obstacles to IMP/IMS from the perspectives of the client and the contractor. This discussion will examine the challenges posed by the IMP/IMS approach and provide proven solutions for integrating the IMP AND IMS with the WBS and CWBS. This discussion will further detail the process of constructing an IMS based on the IMP with a special emphasis on industry standard best practices of IMS development and tracking. This discussion will further provide guidance for managing projects according to Earned Value Management (EVM) principles on projects where the IMP/IMS approach is implemented.

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Tai Okwesa has been performing Earned Value Management, Scheduling and Project Controls implementation and consulting services for the past ten years. He is a certified Project Management Professional (PMP), Earned Value Professional (EVP) and Project Management Institute Scheduling Professional.

Mr. Okwesa has demonstrated a high level of competency in the areas of scheduling and Earned Value Management (EVM) planning, schedule development, EVM implementation, integrated baseline review design and execution, and project management and controls. Mr. Okwesa has a wealth of knowledge in these areas honed as a result of his broad experience working in commercial and government environments on hardware/software system integration, construction, weapon system and transportation projects. A rising leader in project management practice at consulting firm Booz Allen Hamilton, Mr. Okwesa was the eighth professional in the United States to earn the prestigious Earned Value Professional (EVP) certification from the Association for the Advancement of Cost Engineering (AACE). The EVP recognizes competency in the development and implementation of earned value management systems. Mr. Okwesa was one of the core authors of the 8-hour intensive EVP exam.

Mr. Okwesa has a BA in International Affairs and a MBA in Finance both from the George Washington University.

PS 25 - NDIA PMSC: State of EVM in Industry and Government

This presentation will cover the current state of EVMS policy, implementation, communications, and opportunities for collaboration. A brief history of how industry and government got to where we are today will be provided. We will also talk to the charter of the NDIA PMSC, and the path forward to government and industry improvement of this critical program management process.

We will talk to both the Industry viewpoints, concerns, actions, and ownership. We will also engage the audience to address the challenges that we collective face in terms of people, processes and tools.

Current OSD policy ownership, NDIA PMSC actions, and current state of affairs will be discussed. A lively question and answer period will ensure following the presentation. Be prepared to be engaged and involved.

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

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Joe Kusick is the Director of the Raytheon Company Earned Value Resource Center and is the Raytheon Company focal point to the Government Community for all matters relating to the Earned Value Management System Process. He chairs the Raytheon EVMS Management Team. His past experience includes management positions in Industrial Engineering, Manufacturing, Program Management, Subcontract Business Management, Production Scheduling, Business Management, and Material Pricing and Analysis. He has 25 years of management experience in his 33 year career in Aerospace where he spent 17 years with Raytheon, 2 years with Hughes Aircraft, 12 years with Northrop Grumman Electronics and 2 years in contract management with the US Navy. Joe Kusick has presented many papers at Industry conferences on the topic of Program Management and is a recognized Industry leader on the process of Earned Value Management. Joe Kusick holds a Masters in Business Administration from California Polytechnic State University, in San Luis Obispo California as well as a Bachelor of Science in Business from this same school.

PS 26 – Earned Value management System (EVMS) Reviews – Current State of Affairs

EVMS reviews have evolved over the years along with the evolution of the EVMS philosophy. We need to ensure that management systems are providing the data necessary to help management on both sides make sound business decisions, and to help the programs become the success stories we would all like to enjoy. As the review approach evolves organizations are faced with increased challenges in preparing their systems and Managers for the EVMS reviews they will undergo. In this session, the presenter will give the audience a quick historical perspective of that transition from the old C/SCSC, through the Industry Consolidation, and the customers' approach to reviews of contractors' systems. The bulk of the discussion will address what is happening today with regard to EVMS reviews, focusing on customer reviewers' expectations. Actions by contractors prior to and during the reviews are very important to prepare to undergo those reviews. The intent is to highlight the need for the customers and contractors to continue to communicate about the review process in order to avoid unnecessary proliferation of reviews. This is particularly important in light of the limited resources available for review teams.

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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. Gary is a recipient of the David Packard Excellence in Acquisition Award. He has earned a B.S. Business Administration: University of California Berkeley, M.B.A. Business Administration: University of Southern California.

PS 27 - NDIA PMSC Update of the Integrated Baseline Review Guide

The NDIA PMSC is in the process of updating the "Program Managers' Guide to the IBR Process". This presentation will overview the process and timeline for updating the IBR Guide and other NDIA guides. Additionally, we will summarize comments on the IBR Guide received to date and solicit from the audience other items/topics to address as well as ongoing participation in the update process. A signup will be provided for people wishing to receive the next update for one additional comment cycle. The updated guide is targeted for release in 2010.

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Matt is the Lead Project Control Manager for Battelle, and has 17 years of project and financial management experience, including 13 years of applied EV experience. Matt holds active certifications as a Certified Public Accountant (CPA), Project Management Professional (PMP), and Earned Value Professional (EVP). Matt's educational background includes a Bachelor of Business Administration in Accounting and a Master of Business Administration with concentration in Finance. Matt is a member of the NDIA PMSC and participant of the Guide Subcommittee working to update and enhance the PMSC industry guides.

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Dave is a Managing Consultant in the Government Contractor Services practice of Navigant Consulting. He has over 27 years of experience in the Aerospace and Defense industry, working for major government contractors, including McDonnell Aircraft Company, The Boeing Company and Bell Helicopter. He has most recently worked for KPMG and Navigant Consulting supporting their government contracting services groups. He has been a member of the NDIA PMSC since 1997. Dave holds the Earned Value Professional (EVP) certification, and has extensive experience with Earned Value Management System (EVMS) processes and tools. Dave has a Bachelors and Masters degree in Engineering Management from the University of MO – Rolla

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Robert is the NDIA PMSC Subcommittee leader for the Guide Subcommittee. Specific responsibilities include maintenance and updates to all of the NDIA PMSC Guides. He is a former chair and a current officer of NDIA PMSC. He works for Lockheed Martin Information Systems & Global Services and has 25 years of program implementation and practical experience with EVM. At Lockheed Martin, he holds two level 3 (Master) certifications, one in EVM and the other in Planning.

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

PS 28 & 29 – Development of MIL-STD-881 (Part 1 & 2)

*"Insight into the Current Update of Military Handbook 881A –
Work Breakdown Structures for Defense Material Items"*

The Office of the Director of Acquisition Resources and Analysis (ARA), within the Office of the Under Secretary of Defense for Acquisition, Technology and Logistics (OUSD(AT&L)), has responsibility for maintaining the currency and accuracy of the Work Breakdown Structure (WBS) Handbook. The WBS is a product-oriented family tree composed of hardware, software, services, data, and facilities. It provides a consistent and visible framework for defense materiel items and contracts within a program. The WBS is an integral management tool for the program management, earned value management, systems engineering, and cost estimating disciplines. The WBS Handbook presents mandatory requirements for Government program managers for preparing and presenting work breakdown structures. It offers

uniformity in definition and consistency of approach for developing the top three levels of the WBS (program and contract). The benefit of uniformity in the generation of work breakdown structures and their application to management practices is realized in improved communication and increased understanding of acquisition cost, schedule, and technical objectives, impacts, processes, and outcomes.

The WBS Handbook was last updated in July 2005. Since that time, DoD acquisition and cost data reporting policy and guidance have been revised. The revisions to the policy and guidance documents and new applications of the acquisition process need to be incorporated. Moreover, to be more effective in prescribing a standard WBS by major commodity for program and contract data collection and analysis, the existing Handbook requires conversion into a Military Standard. This presentation will provide insight into the proposed changes to the Handbook including its conversion to a Military Standard. As a minimum, the presentation will describe:

- The business case for converting the Handbook to a Standard
- What changes are being made to reflect DoD acquisition and cost data reporting policy and guidance and new applications of the acquisition process
- The importance of the WBS as an acquisition tool, which properly structured can support cost, budget, schedule, technical, contractual, and performance management, and
- How the WBS integrates with program management documents (statement of objectives), systems engineering documents (design, development, specifications), contracts (CLINS), other acquisition artifacts (integrated master plan, integrated master schedule, etc.), and cost estimating documents (CSDR plans, etc.), and
- What commodity definitions have been added/improved with draft examples of specific structures

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

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

PS-30 EVM On Service Contracts (PMSC)

Facilitated by a panel including Eric Christoph (L-3), John Duval (CSC), Gay Infanti (Northrup Grumman), David Muzio (MCR), Craig Whittaker (MCR)

The FAR makes use of EVM mandatory on major acquisitions for development. The FAR also says that the Government may require EVMS for other acquisitions, in accordance with agency procedures. Some Contracting Officers have interpreted the FAR very broadly and are routinely including the EVMS clause in large service contracts containing CPFF, T&M and LOE components and requirements for major amounts of recurring effort. Since there is no specific guidance or policy on how EVMS should be implemented and used to effectively manage services, the NDIA Program Management Systems Committee chartered a working group to develop and recommend policy, process guidance, and/or training to support the implementation of EVMS on services type work.

The working group prepared, and will present in this workshop, a draft White Paper to document its findings and recommendations. The scope of this white paper, broader than its initial charter, includes guidance for selecting the management technique(s) best suited to the acquisition based on the characteristics of the work and the contractual elements present. There are two management techniques that could be used EVM and Performance-Based Services

Acquisition (PBSA). In many cases, EVM is not the optimal choice. Sometimes a combination of the two is the best approach. The discussion will summarize major findings and present a decision matrix, which is included in the white paper to assist in the selection of the appropriate management technique(s) for major acquisitions. The working group made recommendations for changes to the FAR, which are needed to eliminate many of the management challenges associated with services contracts and EVM that were traced directly to policy or contractual issues.

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Eric Christoph, PMP, EVP, is the Director of the Center for Performance Management at L-3 Enterprise IT Solutions (EITS). L-3 EITS is a division of L-3 Communications Corporation (L-3), a leading provider of high-technology products, services, systems, and sub-systems, with over 64,000 employees, and reported 2008 sales of \$14.9 billion. EITS specializes in providing IT service management solutions to Federal, State, and local government organizations. The Center provides consulting on project planning and controls to L-3 business units. The Center also administers an ANSI-748 Earned Value Management System for use by programs throughout L-3. Mr. Christoph is one of approximately 200 Earned Value Professionals certified by the Association for the Advancement of Cost Engineering, and was one of the contributors to PMI's 2005 Practice Standard for EVM. He also represents L-3 on the National Defense Industrial Association's Program Management Systems Committee, where he serves on the EVM for Services working group. Mr. Christoph can be reached at eric.christoph@l-3com.com.

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John Duval is the Director of Earned Value Management Systems for Computer Sciences Corporation's (CSC) North American Public Sector (NPS) Headquarters. He is primarily responsible for supporting government contracts with formal EVM requirements through all phases of EVMS deployment including: proposal support, tool setup and training, CAM and EVM methodology training, IBR preparation, and annual contract surveillance. He has been responsible for the development, implementation and sustainment of an enterprise EVMS which integrated detailed performance data for over 600 concurrent projects. As an EVM Specialist for many years, he has performed thousands of project integrated baseline reviews and monthly performance reviews on services projects. His career has been focused on quantifying and tracking IT services projects on large multi-project government cost-plus award fee contracts.

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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 experience 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 the CPM's Driessnack Award in 2006. He is an Officer at Large of the NDIA Program Management Systems Committee and Chair of the Subcommittee on Service Contracting.

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As Deputy to the Northrop Grumman Corporate Director, Pricing, Estimating and Program Control, Gay works in concert with the Corporate Pricing and Estimating (P&E) Council to develop P&E policy and processes. In addition, Gay works with the Corporate EVM Council to share best practices/lessons learned, discuss/resolve common issues, and jointly work initiatives to enhance and improve the company's use of EVM. Gay is an Officer-at-Large of the NDIA Program Management Systems Committee (PMSC) and chaired the NDIA PMSC's Risk Management working group, leading the development of a white paper on the Integration of Risk Management (RM) and Earned Value Management (EVM), as

well the development of process integration guidance, which was subsequently incorporated into the PMSC's EVMS Application Guide. In that capacity, Gay also conducted many workshops on the topic of RM/EVM Integration. Gay is currently an active participant in both the Contracts and EVM for Services working groups.

Gay joined Northrop Grumman in 1997 when Northrop acquired Logicon, Inc. At Logicon, beginning in 1981, and subsequently at Northrop Grumman, Gay progressed through numerous Business Management positions in finance, operational planning, contracts and pricing, overhead management/control, regulatory compliance, and program management. As EVM focal point at Logicon, and later at the Northrop Grumman IT Sector, Gay was responsible for initial EVMS development/validation, Advance Agreements, EVM training, and EVM compliance.

Gay is a graduate of the University of California, Los Angeles and the Executive Program in Management at the UCLA Anderson School of Business. She is a charter member of PMI-CPM.

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Mr. Whittaker is a Principal at MCR Federal, currently assigned as a Program Manager in support of the EVMS Revitalization initiative at the USAF Space and Missile Systems Center in Los Angeles. He has over 25 years of combined acquisition management experience supporting government and industry within Civil Space, DoD Space and Weapon systems acquisitions and O&M programs. Previous management roles include Program Business Management, Estimating and Pricing, Program Planning and Control, EVMS Project Manager and Focal Point for systems design, program implementation, EVMS surveillance and training. He has successfully led two previous EVMS system validation projects within industry and has been EVMS Task Lead at SMC prior to his current assignment at MCR Federal. Previously, as Director of Project Controls at Agility DGS, Taos subsidiary, a world-wide provider of logistics support services, Mr. Whittaker experienced first hand the inherent risks associated with executing PBA and Sustainment contracts, committing to a tailored EVM approach for managing transition, phase-in and overall program performance.

PS 31 - Current Issues and Initiatives in Air Force Acquisition Cost Analysis

The Air Force, in conjunction with the Department of Defense, is re-energizing cost estimating and analysis within major systems acquisition. During the past 10 years, historical data shows a dramatic increase in systems acquisition cost growth. In this session, the audience will consider this historical data as well as congressional efforts taken to improve the acquisition management and performance. Furthermore, the session will convey specific efforts the Air Force and DoD have and are taking to increase and strengthen the scope of cost analysis across the acquisition spectrum.

Ranae Woods, Associate Deputy Assistant Secretary for Cost & Economics, Office of the Assistant Secretary of the Air Force for Financial Management & Comptroller

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Mrs. Ranae Woods, a member of the Senior Executive Service, is responsible for assisting the Deputy Assistant Secretary of the Air Force for Cost and Economics in directing and supervising Air Force cost, economic and business case analysis. In addition, she assists in managing the activities of the Air Force Cost Analysis Agency and is Deputy Chair of the Air Force Cost Analysis Improvement Group.

Mrs. Woods began her career as a cost analyst and industrial engineer in the Navy Cost Analysis Intern Program where she supported the development of cost estimates for a wide variety of Navy weapon systems. Since 1993, she has held a wide variety of cost analysis positions within the Air Force as well as a career broadening position within the Office of the Deputy Chief of Staff, Strategic Plans and Programs. Mrs. Woods holds a B.S. degree in industrial engineering from Pennsylvania State University, a Master of Business Administration degree from Virginia Polytechnic Institute and State University, and a Master's degree in national resource strategy from the Industrial College of the Armed Services. She is a Department of Defense Certified Acquisition Professional, level III.

PS 32 - GAO's Cost Estimating and Assessment Guide: Best Practices for Developing and Managing Capital Program Costs

The U.S. Government Accountability Office (GAO) is responsible for, among other things, assisting Congress in its oversight of the federal government, including agencies' stewardship of public funds. Legislators, government officials, and the public want to know whether government programs are achieving their goals and what their costs are. The capability to generate reliable program cost estimates is a critical function necessary to effectively use public funds and to

support the Office of Management and Budget's (OMB) capital programming process. Without it, agencies are at risk of experiencing cost overruns, missed deadlines, and performance shortfalls—all of which are recurring problems that our program assessments too often reveal.

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

In this presentation, we will discuss the content of the *Guide* related to Cost Estimating and Earned Value Management. In addition, we will provide examples of recent GAO audits where the *Guide's* best practices criteria were used as an audit tool.

Karen Richey

Karen Richey is a senior cost analyst in GAO's Center for Technology and Engineering, where she is involved in performing cost analyses and technology audits on a wide range of systems. In the past few years, Karen has been responsible for championing the use of earned value management as an auditing tool at GAO. Certified by the National Defense University as a Chief Information Officer (CIO), Karen is also Level-III certified in the field of cost estimating and financial management. She has 19 years experience in the fields of cost estimating and technology auditing.

Before joining the GAO, Karen was a cost analyst for the Department of the Navy where she performed earned value management and developed independent cost estimates for major weapon and automated information systems. Karen holds a degree in Statistics and Mathematics from the University of South Carolina. In the past few years, she has developed and delivered a one day training class for auditors on EVM as well as co-authoring articles in *The INTOSAI IT Journal* and the *Navy Comptroller Magazine*.

In June 2009, Karen received an Award of Excellence from the Federal Capital Planning and Investment Control and an Award of Merit from the Association for the Advancement of Cost Engineering International for leading the development of the GAO Cost Estimating and Assessment Guide.

PS 33 - USAF RI3 Risk Identification Process Interface with EVMS

The newly developed Air Force Risk Identification, Integration and "ilities" process (RI3) is one of the initiatives flowing from the *Air Force Smart Operations for the 21st Century* (AFSO 21) initiative and the *Air Force Develop and Sustain Warfighting Systems* (D&SWS) effort. AFSO 21 is an expansion of previous continuous process improvement initiatives. The Air Force has a history of success in developing weapons systems technical baseline estimates, but there has been no similar success in identifying and quantifying integration, cost and schedule risks. We created the RI3 process as a *decision support system* where systems engineering processes were considered identified a strong correlation between cost, technology maturity and risk. The resulting 101 RI3 questions were classified into nine areas: Design Maturity and Stability; Scalability and Complexity; Integrability (from component level through System of Systems/Family of Systems; Testability; Software; Reliability; Maintainability; Human Factors; and People, Organization and Skills. Secretary of the Air Force directed RI3 to be used Program Sufficiency Reviews of the Air Force High Confidence Pathfinder Programs. It is now time for the EVM community to evaluate the RI3 methodology to determine if it has a place in the EVM practitioner's bag of tools.

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John Cargill's background includes Budget Officer for 2/3's of the Ground Forces and 7 major installations, Comptroller 1/9th and Deputy Comptroller 1/3rd of the Marine Corps. He spent 4 years in the AFCAA Space Division developing cost estimates for SBIRS, NPOESS sensors, GPS IIF and III, SR and TSAT and participated on the OSD CAIG for estimates of the AEHF satellite and the EELV launch vehicle. He is now with the AFCAA Aviation Division evaluating risk and estimating cost and schedules for air armaments at Eglin AFB to include JASSM, ATL, ADS, SDB I and II, FLM, QF-16

HTVSF. He helped author the Air Force Cost Risk and Uncertainty Analysis Handbook, and served on the Air Force AFSO-21 Develop and Sustain Warfighting Systems (D&SWS) TD 1-12 team (providing technology maturity and risk identification and integrability assessment products to for integration into service-wide Systems Engineering processes and guides), and participated on the update of the current GAO Cost Estimation and Analysis Guide. He has a special interest in risk adjusted EVM estimates and is working to combine EVM with technical, cost and schedule risk assessments to tailor performance factors for work remaining to predict future cost and schedule outside the range of traditional EAC methodology. John holds M.A., M.B.A., and M.S. degrees and is DAWIA BCEFM III certified.

PS 34 - MCR's Linked CREST Analysis and Assessment (LCAA™) **A Practical Implementation to Support Program Execution**

**By Wendy Freeman, John Driessnack, Pat Barker, Brian Evans, Andy Lovorn and
Dr. Bill Chadick**

During program execution, Cost Estimating, Risk Management, Earned Value Management, the Integrated Master Schedule and Technical Performance Measures form the basis of quantitative information in Integrated Program Management. MCR's LCAA™ Methodology links these program management disciplines for a complete quantitative program oversight picture and allows for the development of a comprehensive, risk-based Estimate to Complete (ETC). This presentation demonstrates the use of LCAA™ on Major Defense Acquisition Programs including the use of program performance data to produce a probability distribution around the cost estimate, to provide actionable intelligence to the Program Manager, and to support an Independent Cost Analysis (ICA).

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Wendy Freeman has 20 years of experience as a Department of Defense (DoD) and Federal Agency cost estimator/analyst earned while leading various investment program activities including Business Case Analyses, Independent Cost Estimates, Life-Cycle Cost Estimates, Software Intensive Estimates, Return on Investment Analyses, Analysis of Alternatives and Proposal Selection Teams. She teaches several cost estimating courses for both MCR employees and clients and has developed ACEIT courses.

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

Prior to joining MCR, Ms. Freeman spent 12 years supporting the Air Force at Electronic Systems Center, Hanscom AFB, MA where she led programs through DAB reviews, served as Cost Evaluation Team Lead during source selections, published the *Hanscom Air Force Base Economic Impact Study*, served as Chief of Cost Estimating for the Defense Information Infrastructure (DII) Directorate and the Strategic and Nuclear Deterrence Command and Control System Program Office, and served as joint program manager for an ACAT III program during a critical phase of its development.

PS 35 - New Approach to Project Analysis: Wave Model of WBS and Schedule Summaries

Reliable and defensible prediction of project outcomes is still more art than science. The project aggregation into Summaries and expert interviews creating consensus on Summaries Low, Most Likely and High values are a manual and time-consuming processes, relying on professional qualification of experts and analysts. One of the problems is that Summary asymmetrical distributions are difficult to describe by means of classical statistics. Though this looks like just an academic problem, it considerably complicates the project analysis.

The recently developed task wave model calculates asymmetric Summary distributions from “first principles” and provides assessments of systematic delays or cost increases without references to parametric or historical data. The model converts task durations or WBS element costs into frequencies and phases of waves propagating towards a milestone (or total cost) and calculates a wave correlation function emphasizing correlation between randomly delayed tasks or excessive WBS elements costs. The result depends on project maturity (degree of project detail); the model calculates strongly asymmetrical probability densities and compares maturity-based CoVs and risk values with those suggested by the experts. In a recent NASA PA&E/CAD-sponsored research project, the wave model and the conventional Monte Carlo model approaches were applied to a common schedule, and delivered very close results.

This presentation will explain how risk practitioners may use a subset of the current risk inputs required by traditional analysis to provide an alternative milestone or total cost probability in parallel with the conventional approach, to increase confidence in the final results.

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Dr. Fishman is a physicist with extensive background in the application of methods and techniques of modern physics to optical and solid state problems, as well as extending these techniques to the field of project management. After emigrating from Soviet Union in 1987 where he was Senior Scientist at Ioffe Institute in Leningrad, he worked as Senior Scientist at Stanford Applied Physics Department in 1989-1999. From 1995 to 1997, he was consulting for Sprint's Advanced Technology Lab in Burlingame before founding Optimight Communications in San Jose, where he served as President and CTO in 1999-2002. In 2004, he founded Ibico with the purpose to advance methodology and accuracy of project planning, risks and cost estimates.

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Before coming back to the Air Force Cost Analysis Agency, David worked at NASA HQ's in Washington DC from April 2003 – May 2008. Prior to his NASA assignment, he worked at the Aerospace Corporation for two years supporting the Intelligence Community Cost Analysis Improvement Group (IC CAIG). He began at the Space & Missile Systems Center (SMC), Los Angeles AFB, CA in Jan, 1979. He has held a variety of budget, cost performance, cost estimator, cost-risk and program analyst positions up to the present. His career has taken him from Los Angeles to Washington DC and back two times, coming back to where he started at SMC and living in the Redondo Beach area. His work includes earned value analysis, cost estimating, cost-risk analysis, cost as an independent variable (CAIV), Activity Based Costing, aircraft modification financial analysis and space launch range pricing. David is a SCEA Certified Cost Estimator, past president of the SoCal SCEA Chapter (1996-1999) and a former SCEA Board Member. David is looking forward to becoming the SoCal SCEA Chapter president again and reinvigorating the membership with a series of luncheon seminars on cost estimating, cost-risk and cost management tools.

PS 36 –AFCAA/FMS Schedule Data Base Upgrade Project

Author(s): Book, S.; Covert, R.; Menton, N.

The Air Force Cost Analysis Agency Space Programs Division (AFCAA/FMS) maintains databases of spacecraft and space instrument cost, schedule and technical data from which it has derived schedule- and phasing-estimating models. These models are used as program management tools and to support independent cost and schedule estimates. This presentation describes the effort undertaken to expand in both breadth and depth the existing AFCAA/FMS data base and the schedule- and phasing-estimating models derived from them. The data bases were enhanced with additional space-program schedule and phasing data from the United States Air Force (USAF) Space and Missile Systems Center (SMC), National Aeronautics and Space Administration (NASA), National Reconnaissance Office (NRO), and commercial programs. The additional program data were used to support both verification of the correctness and consistency of the existing data and expansion of the capability, range, and credibility of the existing models, as well as identifying directions for new analysis. While current spacecraft schedule-estimating models exist that estimate number of months from both contract Authority to Proceed (ATP) and Beginning of System Integration and Test (BST) to First-Launch Availability (FLA), this effort greatly improves model-estimating detail by collecting and including additional data and also developing new schedule-estimating models for additional spacecraft and space instrument schedule durations.

Although the Air Force Cost Analysis Agency (AFCAA) is the sole financial sponsor of this effort, the contractor, MCR Federal, LLC, and AFCAA consider it to be a collaborative research effort with the other Government organizations listed above, namely USAF SMC, NASA and the NRO. The authors, all of whom are key members of the contractor

team, have access to and several years of current experience working with the leadership and data of all three organizations.

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Mr. Nathan J. Menton is a Cost Analyst who joined MCR, LLC in 2005. With MCR he worked on cost model development and cost estimating in support of the NRO Cost Group from 2005-2006. He is currently developing cost estimates and performing data collection and research as a member of MCR's East Coast Space Division. In this capacity he has worked on a variety of cost estimates and other projects for NASA Headquarters, NASA Goddard Space Flight Center, NASA Langley Research Center, the Air Force Cost Analysis Agency (AFCAA), NOAA and the Marine Corps. Mr. Menton earned a B.S. in Statistics with a minor in Mathematics from The George Washington University in 2004. He is also currently studying for an M.S. in Statistical Science at George Mason University in Fairfax, VA and expects to graduate in December 2009.

PS 37 - Programs and the Future of Project Management

Every government agency is concerned about funding. Those able to make the wisest capital investments succeed while others fall behind in cost and schedule overruns. For contractors and suppliers, increasing globalization has resulted in widespread competition in what used to be domestic markets. Vendors and service providers now routinely bid against global companies, even for local business. In order to remain competitive, businesses are re-examining their management processes to ensure all operations demonstrably serve the larger goals of the organization.

Program Management is gaining prominence as a means of effectively aligning operations to these strategic goals. Government projects have relied on Earned Value Management for years as a means of tracking performance, but with a new groundswell of interest in program management, EVM is only part of the picture. Program Management encompasses not only EVM and project management, but also a product's progression into process management and the rest of its life-cycle, incorporating not only expense, but also funding metrics. The resulting approach to life-cycle management provides greater accountability, clearer project and program ownership definitions, greater operational efficiency, and critical cost savings.

For years, "project" and "program" have been used interchangeably by practitioners. While these terms are deeply related to one another, they are in fact distinct disciplines, and their key differences are gaining more attention. This session will discuss the three primary types of programs, how project, program, and process management relate to one another, and where Earned Value Management fits in.

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Simon Dekker is President and Chief Executive Officer of Dekker, Ltd., an industry leader in program and project management solutions. Mr. Dekker was the original author of the Dekker PMIS™ (Project Management Information System) software suite. Mr. Dekker is an expert on the implementation and integration of contemporary program and project management techniques. His diverse experiential background in scientific applications, business management and administration, program and technology management, and systems engineering projects has made him an invaluable partner to commercial enterprises, government agencies, and government contractors needing to streamline their project management systems.

Prior to co-founding Dekker, Ltd. in 1984, Mr. Dekker directed the business and engineering computer centers for the Ballistic Missile Program Office, and was a software engineer for scientific, satellite, and defense projects. He has published articles and given lectures for various trade associations, private enterprises, government agencies, and universities throughout the United States and Europe on the topics of Project Portfolio Management (PPM), Performance Measurement, and Earned Value Management (EVM).

PS 38 - New Earned Value Policy and Guides at AF Space and Missile Center

By Albert Shvartsman, John Driessnack, Wendy Freeman, Brian Evans, and Dr. Bill Chadick

AF Space and Missile Center at LA AFS has issue new EV policy and is developing new guidance, tools, and training in an effort to revitalize EV as a primary management tool for the Center. This presentation outlines the efforts to date and solicits industry feedback. Along with an expanded and more detailed policy, a new PM and Analysis set of guides are being developed that outlines a comprehensive linked analysis approach. Key to the effort is a focus on the program management team needs in analysis of not only the traditional EV cost data, but linking the information with the IMS, Risk, and Cost information. The new set of training being developed will also be discussed.

This session is for individuals who wish to understand the new policy direction at SMC and what analysis the Wings will be performing in the future under the new guidance and training.

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Albert Shvartsman is the Earned Value Management Chief of the Space and Missile System (SMC) Center under the Air Force Space Command. Mr Shvartsman is responsible for overseeing all SMC EVM functions including developing and maintaining EVM expertise, process, compliance, training necessary to execute Major Defense Acquisition Programs (MDAP) today and lead SMC's acquisition in the future. SMC Executive leadership designated him as a project leader for EVM revitalization initiative which includes development of state of the art infrastructure which will provide effective management techniques for managing contractors' efforts, with the ability to obtain accurate and reliable information on the progress of the performing organizations.

Prior to this position Albert serve in the GPS joint service program office as a Cost Estimating and EVM Lead for the for multiple MDAP , for which he was awarded in 2004 as a "Cost Analyst of the year" by the Air Force Space command.

Prior to joining the Air Force, Albert had over 10 years of Financial Management experience as corporate controller in private sector.

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John Driessnack is the Senior Director of the Executive Consulting Group. The group is responsible for Integrated Program Management support across MCR. As the Senior Director, John led consultant efforts and workshops for Industry, Federal Agencies, including DoD, FAA, and Intel programs. Efforts concentrate on improving customer integrated program management processes. He continues to lecture during executive courses at Defense Acquisition University (DAU) on Risk Management as well as writing and facilitating cases. An editor on the DAU Risk Management Community of Practice (CoP), he edited the Acquisition Review Quarterly special editions on Risk Management, Spring 2003. He recently co-chaired the NDIA PMSC's joint Industry/Government Risk Management Working Group and lead for the process team.

Prior to joining MCR, John had over 20 years experience in DoD leadership positions on various joint programs, including GBS, V-22 Osprey, Air Borne Self-Protection Jammer, and various other AF program. He retired as a professor at Defense Acquisition University. He has presented papers or lectured at various economics, Society for Cost Estimation and Analysis (SCEA), and various Program Management related conferences as well at Lockheed and Raytheon. He is currently an adjunct faculty member at American University teaching graduate level Program Management course.

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Wendy Freeman has 20 years of experience as a Department of Defense (DoD) and Federal Agency cost estimator/analyst earned while leading various investment program activities including Business Case Analyses, Independent Cost Estimates, Life-Cycle Cost Estimates, Software Intensive Estimates, Return on Investment Analyses, Analysis of Alternatives and Proposal Selection Teams. She teaches several cost estimating courses for both MCR employees and clients and has developed ACEIT courses.

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

Prior to joining MCR, Ms. Freeman spent 12 years supporting the Air Force at Electronic Systems Center, Hanscom AFB, MA where she led programs through DAB reviews, served as Cost Evaluation Team Lead during source selections, published the *Hanscom Air Force Base Economic Impact Study*, served as Chief of Cost Estimating for the Defense Information Infrastructure (DII) Directorate and the Strategic and Nuclear Deterrence Command and Control System Program Office, and served as joint program manager for an ACAT III program during a critical phase of its development

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

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

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

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Dr. Chadick is an extraordinarily successful educator, leader, and manager who has operated in a variety of industries: education, telecommunications hardware and software projects, logistics management, military command and control systems (C3I, C2, C4), crisis management and disaster recovery systems, and Air Force sensor systems. He has special expertise in developing and implementing processes in project management, earned value management, risk assessment/disaster recovery/business contingency operations, and Six Sigma process improvement. Dr. Chadick has significant experience in planning and supervising programs that require integration of hardware, software, and

operational infrastructure systems; logistical deployment of platforms; and command, control, and information systems. Dr. Chadick has exceptional leadership skills as a former Army infantry officer. He is an experienced educator in academic and corporate environments focusing on project risk management and quality management. Dr. Chadick is a capable and dependable self-starter who provides a variety of leadership and project/program management skills to meet customer needs.

At the present time Dr. Chadick is assisting with SMC's Earned Value revitalization process where he is authoring policy guidelines, leading analysis efforts, providing training, supporting IBRs and compliance reviews. Prior to his engagement with MCR, LLC, Dr. Chadick managed project management and earned value system implementations at ITT Systems, SI International, Colorado Springs Utilities, and MCIWorldcom. He is also an adjunct faculty member at Colorado Technical University teaching graduate level program management courses.

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