Practice Symposia
Implementation Considerations Track

Coordinator: Dale Gillam

PS-25 SwRI: A Case Study in Developing a Role Specific Process Framework for Managing EVM, People and Data
   Bob Harbaugh, SwRI
   Tom Shanahan, ProjStream

PS-26 The CAM as “Mini-PM”—the Lynchpin of a Successful EVMS
   Michael Nosbisch, Hill International
   Shawna Jones, SMJ Consulting

PS-27 Integrated Subcontractor and Prime Program Planning
   Elizabeth Schloer, Booz Allen Hamilton

PS-28 PARCA: EVM Applicability – Why us?
   John McGregor, PARCA
   David Nelson, PARCA
   Karen Kostelnik, PARCA

PS-29 Integrated Program Management On Services Contracts: A Real World Example
   Patrick Moylan, United States Department of Homeland Security, PIADC
   Gordon Kranz, Enlightened IPM, LLC

PS-30 Over Target Baseline: Lessons Learned from the NASA SLS Booster Element
   Truman Carroll, NASA/SAIC

PS-25 Southwest Research Institute (SwRI): A Case Study in Developing a Role Specific Process Framework for Managing EVM, People and Data

Brief Session Summary:
This session will discuss SwRI’s experience in implementing role based work flow to improve efficiency and accuracy of the planning, change control, work authorization process as well as a process for improving estimated actuals traceability, accuracy and efficiency.

Expanded Session Description:
Southwest Research Institute (SwRI) has implemented a role based workflow system that enables management of processes such as creating and finalizing a basis of estimate, initiating and finalizing a baseline change request (BCR), initializing and releasing a Work Authorization Document (WAD). In this process, a BOE is initiated by the CAM who is assigned responsibility to estimate an area of the
project. Once the CAM completes the estimate, a BOE form that contains time-phased budget data as well as other BOE type info is signed off by the CAM electronically and routed to his or her Functional Manager. The Functional Manager can either approve or disapprove the BOE. If the BOE is approved, it gets routed to the next role for approval or potential rework. If the BOE is rejected, the Functional Manager completes a description area for why the BOE was rejected and this gets sent back to the CAM. Each step in the workflow approval is captured in the database and each revision gets sent to a smart folder repository by Project, by CAM, by process (whether it’s a BOE, BCR or WAD). This session will further describe how a process framework tied to actual EVM data leads to increased accountability, cuts down on errors and improves communication. SwRI will present any metrics it has during the session of reduced non-compliance discrepancy report (DR) rate, reduced number of errors, and improved process time for estimating, change and releasing work.

**Expected Key Takeaways for Participants:**

Attendees will understand 1) how SwRI was able to integrate process with program data to improve efficiency 2) how this system improved communication between CAMs, Functional Managers, Project Planners/Project Controls, Program Managers and the customer 3) why connecting process to the data system raises the level of accountability and cuts down on errors 4) SwRI’s process for estimating, change and authorizing work as well as the estimating actuals process and why this improvement greatly reduces the number of DRs.

Bob Harbaugh – Project Planning & Controls/EVM Manager  
Phone: (210)522-2789   Email: bharbaugh@swri.edu

Mr. Harbaugh is the Project Planning & Controls/EVM manager in the Space Systems & Engineering Division at SwRI and a recognized focal point on EVM within the NASA community. Bob has over 30 years of experience in project management, project controls, scheduling/planning, cost estimating and earned value management in the aerospace industry. Bob has supported multiple DoD programs and NASA/ESA space science missions over the years with an excellent track record of on time/on cost performance and mission success, and is currently spearheading the SwRI EVMS validation effort.

Tom Shanahan – President and CEO, ProjStream  
Phone: (407)575-0985   Email: tshanahan@projstream.com

Mr. Shanahan is the founder of ProjStream and is a recognized thought leader and visionary within the project management software industry. Mr. Shanahan has over 20 years of experience in project management, earned value management, bid and proposal development and strategy, cost engineering and software application development. Tom has a proven track record across multiple industries including Aerospace and Defense, Government, Energy and EPC. Tom has led many
successful EVMS implementations as well as many successful bid and proposal winning strategies.

**PS-26 The CAM as “Mini-PM”—the Lynchpin of a Successful EVMS**

**Brief Session Summary:**

The control account is the key component of an EVMS that complies with the EIA 748 Standard. As a result, the control account manager, or CAM, is absolutely the key role when implementing and maintaining an EVMS. This presentation will provide a unique perspective on the role of the CAM, but even more importantly will offer examples and recommendations that can help contractors assign CAMs that are empowered to succeed in the all-important role.

**Expanded Session Description:**

The control account is the key component of an earned value management system (EVMS) that complies with the EIA 748 Standard. As a result, the control account manager, or CAM, is absolutely the key role when implementing and maintaining an EVMS—responsible for defining, planning, directing, monitoring and controlling the work encompassed within the control account in order to take pressure off the overall project/program manager. The government’s recognition of the importance of this role is underscored during the validation and surveillance process, when CAMs become the main focus of the onsite interviews that are conducted by the government’s review team. In spite of this, however, government contractors still struggle to empower their CAMs sufficiently to be successful in the role. All too often, technical or finance personnel are assigned the collateral duty of CAM, not only without meaningful incentives to acknowledge the additional work but also without the requisite authority to act as the “mini-program manager” that they are intended to be.

**Expected Key Takeaways for Participants:**

This presentation will provide a unique perspective on the role of the CAM, but even more importantly it will offer examples and recommendations that can help contractors assign CAMs that are empowered to succeed in the all-important role, just like their program managers always have been.

**Michael Nosbisch, Hill International**

michaelnosbisch@hillintl.com; 562-896-0374

Michael has over 27 years of experience in project/program management and controls within both the government and private sectors. He has worked for several of the leading engineering, procurement, and construction (EPC) firms in the industry, to include URS Corporation, Jacobs Engineering, Kiewit, and Parsons.
Corporation. From 2009 to 2015, Michael managed successful EVM consulting practices for both SM&A and Project Time & Cost. He currently is a Vice President at Hill International, and is the project manager for several contracts providing project control and earned value management services to public agencies and private clients throughout the state of California.

Michael is currently a Director of the Orange County Post of the Society of American Military Engineers (SAME). He has been an active member of AACE International since 1999, earning numerous professional certifications as well as serving President of the Association from 2011 to 2012. Michael is also an adjunct professor at the University of Southern California, having taught graduate level courses in heavy construction estimating and scheduling.

Shawna Jones, SMJ Consulting
sjones@smjconsultinggroup.com; 504-655-4275

Shawna Jones is President of SMJ Consulting. She has over 17 years of experience in project management, EVM, and proposal solutions serving companies from the proposal phase through the program execution phase on various government contracts. These solutions include project management process design, business development, proposal management, EV best practices, EVM system implementation and process design, IBR preparation, ANSI/748 regulation and compliance, operational support, and industry leading earned value training.

Ms. Jones has extensive experience designing and implementing EVM systems for companies, developing and authoring EVM system descriptions, and creating program operating procedures. She is a skilled trainer. Ms. Jones has coordinated and developed comprehensive EVMS training curriculums for various companies. She has consulted for companies such as Honeywell, Lockheed Martin, CH2Mhill, Bollinger Shipyards, Aerojet Rocketdyne, Xerox, Northrop Grumman, and General Dynamics.

PS-27 Integrated Subcontractor and Prime Program Planning

Brief Session Summary:

Integrating subcontractor performance into the prime program for analysis and reporting is instrumental during planning and execution. Thoughtful integration lays the groundwork for success. During this session, we will explore several scenarios and approaches for planning, analysis, and reporting; address the unique factors to consider in regards to the program environment, contract type and size, and the subcontractor’s role and capabilities; and discuss compliance with agency-level policies and procedures.
**Expanded Session Description:**

Integrating subcontractor performance into the prime program for analysis and reporting is instrumental during planning and execution. Thoughtful integration of the prime contractor and subcontractor(s) activities lays the groundwork for success. During this session, we will explore several scenarios and approaches for planning, analysis, and reporting. There are unique factors to consider in regards to the program environment, contract type and size, and the subcontractor’s role and capabilities. We will cover variation in the program landscape to understand the pros and cons of dissimilar approaches. We will also touch on compliance with agency-level policies and procedures.

There is no one-size-fits-all approach to planning a program around the prime contractor and its subcontractor(s). Often times scope, timeline, constraints, strengths, and experience dictate the working relationship between a prime contractor and subcontractor. Let us admire some of these challenges together and empower effective integrated program management!

**Expected Key Takeaways for Participants:**

Attendees will learn about the prime-subcontractor relationship via discussion scenarios centered on prime-subcontractor partnered and individual scenarios. Discussions will cover logistics, challenges, and benefits during planning and execution.

**Elizabeth Schloer, PMI-SP, Booz Allen Hamilton**

Email: schloer_elizabeth@bah.com  Phone: (240) 314-5715

Elizabeth is the Deputy Earned Value Management (EVM) Focal Point at Booz Allen Hamilton. In her role, she monitors Booz Allen’s Earned Value Management and Purchasing Systems. Elizabeth leads the training programs, and analyzes laws and regulations to compose compliant policies and procedures for both systems. Elizabeth is conversant in project and portfolio management, including EVM implementation and analysis, schedule development and analysis, risk analysis, performance metrics and trend analysis, and process controls and training. She has extensive experience working with civil and defense agencies on multi-million and billion dollar programs.

Elizabeth is certified by the Project Management Institute (PMI) as a Scheduling Professional (SP).

**PS-28 PARCA: EVM Applicability – Why us?**

**Brief Session Summary:**
Performance Assessments and Root Cause Analyses (PARCA) in the Office of the Assistant Secretary of Defense for Acquisition is the Department of Defense focal point for all policy, guidance, and competency for Earned Value Management (EVM).

There are factors that influence the applicability of EVM that go beyond the requirements in the DFARS. This session will provide insight into the processes and situations of EVM applicability.

**Expanded Session Description:**

Performance Assessments and Root Cause Analyses (PARCA) in the Office of the Assistant Secretary of Defense for Acquisition is the Department of Defense (DoD) focal point for all policy, guidance, and competency relating to EVM. To facilitate consistent EVM implementation across the Department, PARCA is responsible for the development and communication of DoD EVM policy, guidance and interpretation, and for managing the EVM Central Repository as the authoritative source of EVM data for the Department.

Requirements for EVM and EVMS in DoD exist to provide Government PMOs the insight into contractor performance and to provide assurance that the systems that generate EVM data are sound. In that, there are factors that influence applicability of EVM that go beyond the requirements in the DFARS. This session will provide insight into the processes and review various situations of EVM applicability.

**Expected Key Takeaways for Participants:**

- Participants will learn the DFARS EVMS requirements
- Participants will learn about how to determine applicability of EVMS requirements
- Participants will learn EVM applicability in special situations

**John S. McGregor, Deputy Director for Earned Value Management PARCA**

E-mail: john.s.mcgregor2.civ@mail.mil  Phone (703)697-7727

Mr. John S. McGregor is the Deputy Director for Earned Value Management in the Performance Assessments and Root Cause Analyses organization in the Office of the Assistant Secretary of Defense for Acquisition.

During his nearly thirty year career, Mr. McGregor has held various military, contractor, and DoD civilian positions including mission support, program analysis and oversight throughout the entire DoD Acquisition Lifecycle, and policy development. His responsibilities have ranged from air vehicle maintenance and aircraft deployments to budget functions for ship operations programs, to planning, tracking, and control of performance data for major acquisition programs.
Mr. McGregor has established a track record of superior performance and leadership resulting in streamlined operations with increased efficiency and effectiveness.

Additional Speakers: Karen Kostelnik and David Nelson

**PS-29 Integrated Program Management On Services Contracts: A Real World Example**

**Brief Session Summary:**

Traditional practices for managing O&M services are insufficient to ensure contract performance management aligns with strategic intent and focuses on the highest priority efforts. PIADC has developed and implemented a new method to manage service contracts based on accepted industry standards. DHS will show the application of Integrated Program Management principles to service based contracts, and discuss plans for better integrating technical status, risk, and other PM principles to further improve the management of services contracts.

**Expanded Session Description:**

Historically Cost Plus Award Fee contracts have been used for Operations and Maintenance service contracts at the Department of Homeland Security’s (DHS) Plum Island Animal Disease Center (PIADC). PIADC has developed and implemented a new method for service contract monitoring and evaluation that are based on industry accepted management standards. PIADC refers to this effort as “Integrated Program Management” (IPM). IPM uses Earned Value Management (EVM), the Project Management Institutes Project Management Book of Knowledge (PMBOK®) and the International Standard ISO 9001:2008 Quality Management Systems – Requirements (ISO-9001)

As part of its continuous process improvement environment, PIADC is looking to further integrate and improve their management processes. In late October 2015 PIADC conducted a deep dive review of their processes and identified additional integration opportunities with technical status, risk, and practices to understand and reduce the impact to normal operations when emergency unplanned events occur such as weather or unplanned equipment failures. This workshop will present and solicit feedback on a variety of management techniques currently being used on PIADC contacts including the potential use of Agile principles to manage risk, normal operations, pre-planned projects, and emergency situations which interrupt the normal operations.

**Expected Key Takeaways for Participants:**
Audience will better understand: 1) Applying IPM to services contracts provides better situational awareness; 2) Industry standard best practices can be tailored to support any kind of contract;

**Patrick Moylan PMP, Program Manager at the United States Department of Homeland Security, Plum Island Animal Disease Center (PIADC); Gordon Kranz President of Enlightened IPM**

Patrick Moylan is the Program Manager for the Operations and Maintenance contract at the PIADC. PIADC is under the Office of National Laboratories, Science & Technology Directorate of the United States Department of Homeland Security. Moylan has more than 26 years of experience in Operations, Maintenance and Management of research facilities. He previously worked for Department of Energy’s Brookhaven National Laboratory at the High Flux Beam Reactor and the National Synchrotron Light Source. He held positions in research facility operations, management, engineering, project management, and training.

Gordon Kranz is president of Enlightened Integrated Program Management, LLC (Enlightened IPM), a program management, engineering, planning and control consulting company focused on transforming integrated program management practices across the enterprise. Gordon served as Deputy Director PARCA for Earned Value Management within the office of OSD/AT&L, where he was responsible for EVM policy and implementation across the Department.

**PS-30 Over Target Baseline: Lessons Learned from the NASA SLS Booster Element**

**Brief Session Summary:**

Goal of the presentation is to teach, and then model, the steps necessary to implement an Over Target Baseline (OTB). More than a policy and procedure session, participants will learn from recent first hand experience the challenges and benefits that come from successfully executing an OTB.

**Expanded Session Description:**

Few disciplines within Earned Value Management are as challenging as Over Target Baseline (OTB) implementation. The concepts, policy, and procedures are well documented but practical experience can be hard to come by. This is the situation I found myself in 2014 as our project prepared for an OTB on our prime contract. This session will teach, and then model, the steps necessary to implement an Over Target Baseline. More than a policy and procedure session, participants will learn from recent first hand experience the challenges and benefits that come from successfully executing an OTB.
Expected Key Takeaways for Participants:

Goal of the presentation is to teach, and then model, the steps necessary to implement an Over Target Baseline (OTB). More than a policy and procedure session, participants will learn from recent first hand experience the challenges and benefits that come from successfully executing an OTB.

Truman J. Carroll – NASA/SAIC

Truman.J.Carroll@nasa.gov; 256-529-8612

Truman J. Carroll serves as the Executive Vice President for the College of Performance Management Tennessee Valley Chapter (CPMTV). For the past 7 years he has been an analyst within the NASA Space Launch System Program Planning & Control office supporting the SLS Booster Element. Prior to this Truman was an IT Project Manager supporting various Marshall Space Flight Center programs and projects. Truman and his family also run a homestead farm on 26 beautiful Tennessee acres complete with pigs, sheep, and a milk cow named Maggie. Find us on facebook at RaisedRightFarmTN.

Education: Bachelors & Masters in Management Information Systems (MIS) – University of Alabama Huntsville (UAH)