

Are you Prepared for an Integrated Baseline Review (IBR)?



Certification Training



Knowledge Sharing



Continuous Learning



Mission Assistance

Date: May 6, 2015
Presenter: Joel W. Little, EVP
Email Address: joel.little@dau.mil





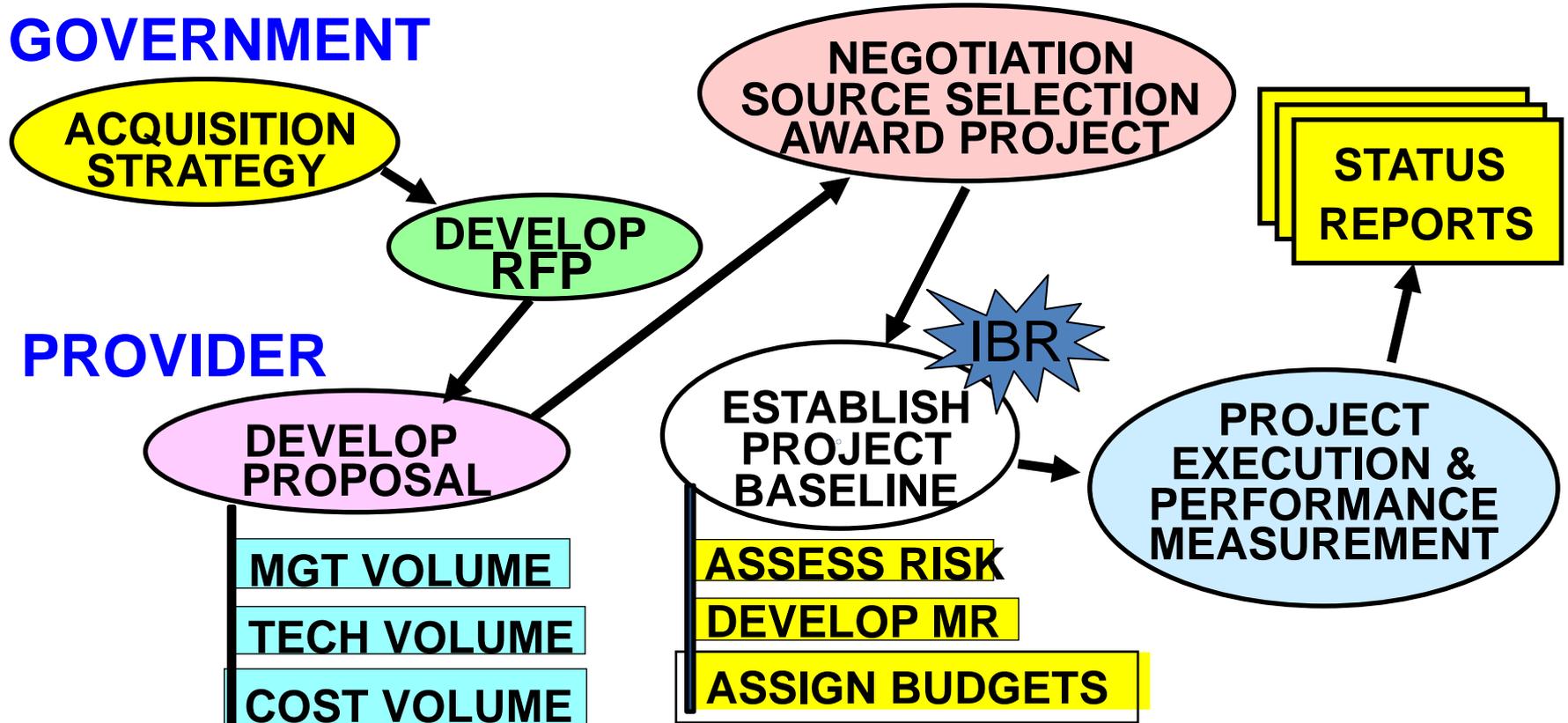
IBR:

- **Purpose/Objectives**
- **Process**
- **Preparation (Government & Contractor)**
- **Execution**



EARNED VALUE MANAGEMENT WITHIN THE CONTRACTING PROCESS

GOVERNMENT



PROVIDER

We jointly need to be able to answer this basic question...

Can we execute this contract
(technical work scope),
given the available
schedule and budget
resources?

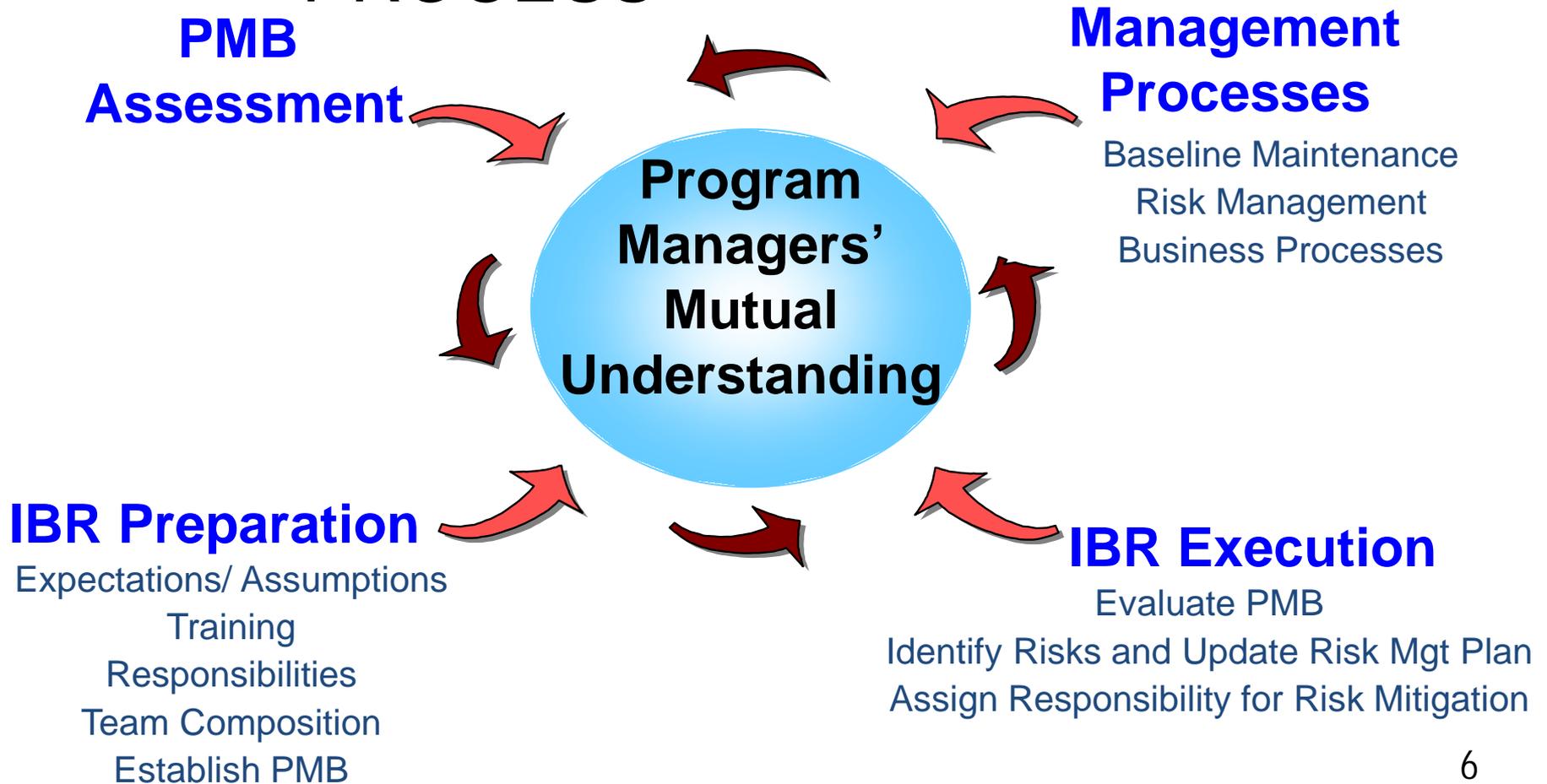


Supporting Objectives

- **Confirm compliance with the following business rules :**
 - **Technical scope of work is fully included and consistent with authorizing documents**
 - Key schedule milestones are identified
 - **Supporting schedules reflect a logical flow to accomplish the technical work scope**
 - **Resources (budgets, facilities, personnel, skills, etc.) are adequate and available for the assigned tasks**
 - Tasks are planned & can be measured objectively
 - **Underlying PMB rationales are reasonable**
 - Managers have implemented required management processes.
- **Assess MR with respect to project risk not in the PMB**
- **Assess overall how PMB achieves the above objectives**



INTEGRATED BASELINE REVIEW PROCESS





IBR PREPARATION - EXPECTATIONS

PMs should develop a plan for conducting the review:

- Define the objectives for the IBR
- Identify key responsibilities
- Identify documentation needs
- Plan & conduct IBR training
- Plan & schedule review dates
- Review work scope documents
- Identify required technical expertise
- Establish how IBR findings will be documented and resolved
- Establish risk evaluation criteria
- Identify procedures for risk identification, documentation, and incorporation into project risk management planning.

Who – What – When – Where - How



IBR Notification to Contractor



<Company Name>
<Company Address>

Ref: (a) Contract <Contract Number>

Dear <Company Contracting Officer>:

The <PMA Name> Integrated Product Team (IPT) plans to conduct an Integrated Baseline Review (IBR) on the <Program Name> in <Company City and State> <Review Dates>.

The purpose of the IBR is to achieve a mutual understanding of the Performance Measurement Baseline and its relationship to the underlying Earned Value Management (EVM) systems and processes. The objectives are to gain insight into cost and schedule risk areas associated with the remaining effort, as well as develop confidence in the program's operating plans. This will be accomplished by evaluating the performance measurement baseline to ensure it captures the entire remaining technical scope of work, is consistent with contract schedule requirements, and has adequate resources assigned.

Enclosed is a list of administrative and documentation requirements that need to be submitted electronically for government review prior to <Date Documentation Required>. Forward all electronic submissions to <POC email address>. Please note the IBR team requires non-escort badges, a working area with tables, access to a fax machine, printers, and telephones.

IBR team training is scheduled for <Training Dates>. <Company Name> personnel are invited. The location of the training, tentative agenda and the list of proposed team members will be provided under SEPCOR.

<Government IPT Lead's Name> will be the IBR Team Leader for this review. Questions concerning the IBR may be directed to <Government IPT Lead's Name> <Government IPT Lead's Phone Number>, or <EVMS Analyst's Name> <EVMS Analyst's Phone Number>.

If you have any questions pertaining to this notification, contact <Contracts Specialist's Name>, at <contracts Specialist's Phone Number>.

Sincerely,

<PCO'S Name>
Procuring Contracting Officer

Encl: Review Requirements

Copy to: PEO <>
DCMA HQ
DCMAC-C
DCAA Resident Office

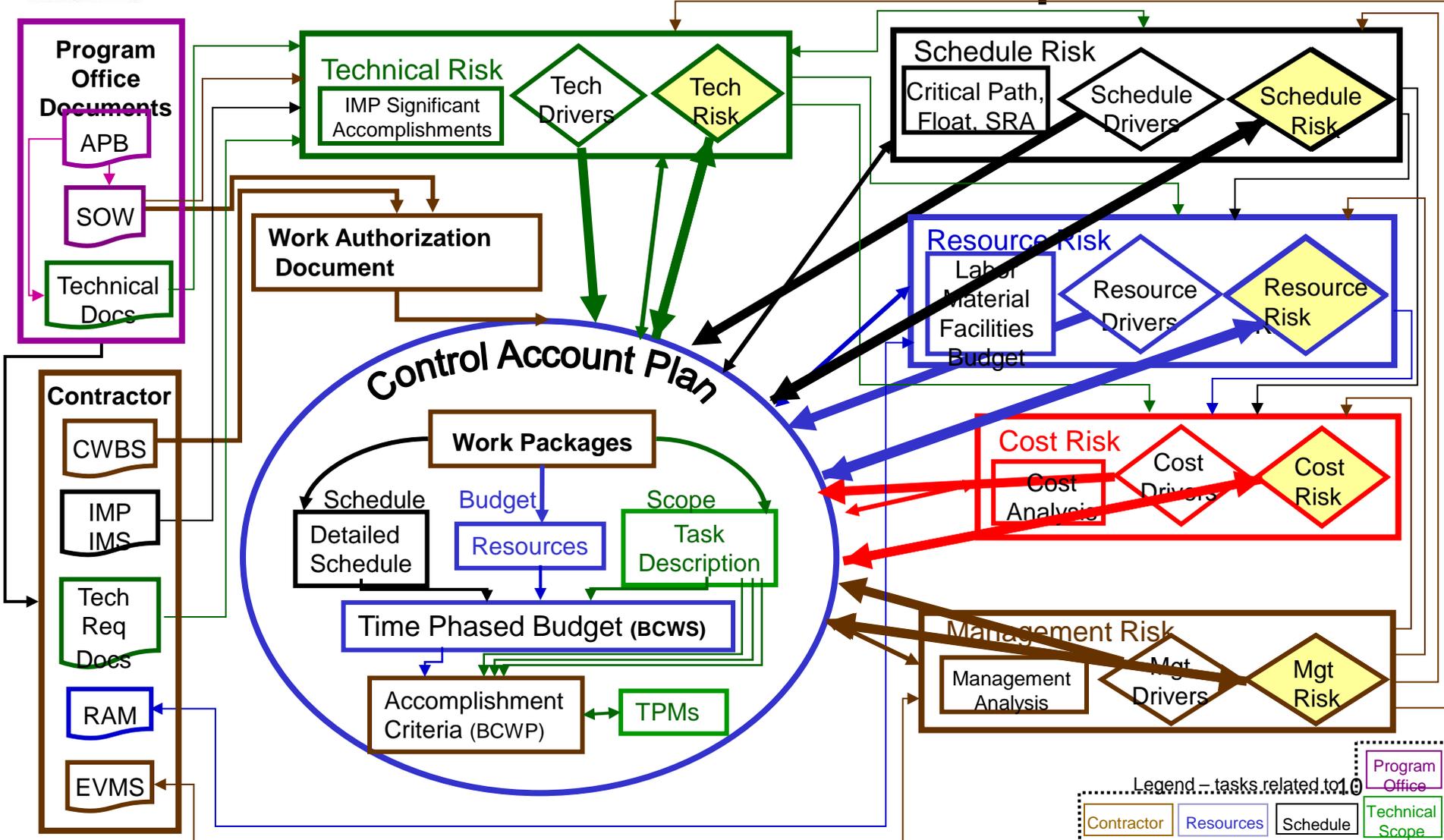


IBR PREPARATION – DOCUMENTATION

Identify Documentation Needs

- CWBS
- CWBS Dictionary
- Contractor's Organizational Breakdown Structure
- Responsibility Assignment Matrix
- Work Authorization Documents
- Integrated Master Schedule
- Risk Management Plan and Register
- Control Account Plans
- Current CPR & CFSR
- Detailed Control Account Schedules
- Schedule Risk Assessment (SRA)
- EVM System Description
- Subcontractor Data
- Basic Contract
- P000 Mods
- EVMS Surveillance Reports
- DCMA/DCAA findings (CAR)

PMB Assessment and IBR Preparation



Now what?

Execute!

- In-Brief
- Cam – Discussions
- Daily Wrap-ups
- Document Findings/Action Items
- Out-Brief
- Track Action Items



TYPICAL CAM DISCUSSION QUESTIONS

- **Show** me your latest work authorization document
- **Show** me the schedule you are working to and how it supports the master schedule
- **Show** me how your resources are planned in the schedule
- Explain how much of your budget is LOE and why
- **Show** me documentation assuring the resources in the schedule are linked to the budget dollars
- **Show** me what you consider to be your critical activities
- **Show** me an example of horizontal schedule traceability within your tasks
- **Show** me an example of vertical schedule traceability in support of the Component Master Schedule
- **Show** me how your subcontract effort is planned
- How is the work classified? What EVM Method did you use?
- **Show** me how your material and travel effort is planned

Where can I find...

Help!!!!!!



The PM's Guide to IBR Process



The Program Managers' Guide to the Integrated Baseline Review Process



ACQUISITION, TECHNOLOGY AND LOGISTICS

MEMORANDUM

SUBJECT: The P

In accordan

(s) n

Mar

of r

ontr

ent g

most

resul

ptio

y of

elinc

als,

ide i

line

durin

in an

re-
en

the use

resides on the

of the Secretary of Defense

(acq/pm)

Comments or questions on the IBR Guide

at ([703](tel:7036950707)) 695-0707.

While most IBRs generally conform to DoD policy, inconsistent policy interpretations resulted in the development of individual Service/Agency IBR guidebooks, differing perceptions of purpose and value, and inconsistent IBR execution. **To improve the consistency of the overall IBR Process, The Program Managers' Guide to the Integrated Baseline Review Process (TAB A).** This Guide clearly defines the objectives of an IBR. It also discusses a baseline review process that will lead to a better understanding of program risks.

To improve the consistency of the overall IBR Process, The Program Managers' Guide to the Integrated Baseline Review Process (TAB A).

This Guide clearly defines the objectives of an IBR. It also discusses a baseline review process that will lead to a better understanding of program risks.

This Guide should be used to improve discipline on an acquisition program.

encouraged to use this Guide during IBR training, when preparing for an IBR, and then again during the execution and conduct of the IBR. Attached at TAB A is a letter of endorsement from the former Under Secretary of Defense (Acquisition, Technology and Logistics) encouraging the use of the IBR Guide to improve the consistency of the overall process. The IBR Guide resides on the Office of the Secretary of Defense EVM web site (www.acq.osd.mil/pm/). Comments or questions on the IBR Guide may be directed to Ms. Debbie Tomsic, (703) 695-0707.

Comments or questions on the IBR Guide may be directed to Ms. Debbie Tomsic, (703) 695-0707.

Nancy U. Spruill
Director, Acquisition Resources and Analysis

Integrated Baseline Review (IBR) Guide

Revision 1

September 1, 2010



National Defense Industrial Association
Program Management Systems Committee

National Defense Industrial Association (NDIA)
2111 Wilson Blvd., Suite 400
Arlington, VA 22201
(703) 522-1820
Fax (703) 522-1885
www.ndia.org

© 2010 National Defense Industrial Association, Program Management Systems Committee (PMSC)
Permission to copy and distribute this document is hereby granted provided that this notice is retained on all copies, that copies are not altered, and that the NDIA PMSC is credited when the material is used to form other copyrighted documents.

Nancy U. Spruill
Director, Acquisition Resources and Analysis

Attachments:
As stated





Team Handbook as a Road Map

**INTEGRATED BASELINE REVIEW
TEAM HANDBOOK**

<PROGRAM NAME>
<CONTRACT NUMBER>
<COMPANY NAME>
<COMPANY CITY, STATE>
<IBR DATE>

TABLE OF CONTENTS

	Page(s)
Purpose.....	4
Program Background.....	4
Methodology.....	5
Review Agenda.....	6
Sample IBR interview questions.....	7
Discussion Guidelines.....	20
Documentation Guidelines.....	22
Discussion Assessment Form.....	24
Documentation Request Form.....	25
Concern Area Report.....	26
Risk Evaluation Criteria.....	27
Risk Assessment Form.....	30
Glossary of Eamed Value Management Terms.....	31



EVM Analysis Resources

- DCMA - Defense Contract Management Agency
 - Onsite contractor Surveillance & Expertise
 - Control Account Manager (CAM) Interviews
 - Verification of Policy Compliance
- DAU - Defense Acquisition University
 - Gold Card - Summary of EVM Techniques
 - Tailored Training and Recommendations
 - Acquisition Community Connection: <https://acc.dau.mil/>
 - Continuous Learning Modules (CLMs) – short online courses
- EVM Data Analysis Tools, such as wInsight –
 - Color Coded Variance Charts and Graphs
 - Electronic Interface with Contractor Data
- Schedule Analysis Tools – Critical Path
- PM's Guide to IBRs and EVM Implementation Guide
- ANSI Standard 748

OSD EVM Homepage: <http://www.acq.osd.mil/pm/>

DAU Quick Links Help

ACC Practice Center > Earned Value Management

BECOME A MEMBER
BENEFITS OF ACC MEMBERSHIP

Sign In
Login with your CAC
Insert your CAC now, and click this button.
Login with your CAC

Login with your Password
User Name:
Password:
Forgot your password?
Login
Benefits of ACC Membership

- Browse
- ACC Home Up one level
- Earned Value Management
 - DoD EVM Policy & Guidance
 - EVM Community Connection
 - EVM Contract Documents
 - EVM Research Library
 - EVM Tools
 - EVM Training Center
 - OMB Recommended References

Earned Value Management

Community

Conduct a Search Other Actions

Search

Content & Member Profiles All Communities

Main View All Contributions What's New Q & A

Welcome

Links of Interest

- Acqupedia
- Ask A Professor

- ### Popular Content
- EVMS forProject
 - DAU Gold Card - July 2012
 - I went through the learning on the website and there was an exam at the end of the lesson as...
 - Earned Value Management Implementation Guide - October 2006
 - Fundamentals of EV module 1 - Basics - Updated Mar 05
 - NDIA ANSI EIA, 748-A Intent Guide Outdated
 - Where is the DCMA Interpretive Guide (DIG)?
 - CPR DID DI-MGMT-81466A - MAR 30, 2005
 - NDIA ANSI EIA, 748 Intent Guide - Unrated November

Summary

- EVM is the most comprehensive program management tool
- Senior DOD and Congressional Leaders use it to make program decisions
- Management involvement ensures EVM data is used in a proactive manner to manage programs and make timely corrective action decisions
- **A well conducted IBR ensures the Government /Contractor team mutually understands the detailed plan to develop the system, the risks involved, and how to handle those risks.**

Questions?