The Integrated Baseline Review

DAVID C. BACHMAN
Defense Acquisition University
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2.9.3.5. -- Integrated Baseline Reviews (IBRs)
PMs and their technical staffs or IPTs shall evaluate contract performance risks inherent in the contractor’s planning baseline. This evaluation shall be initiated within 6 months after contract award or intra-government agreement is reached for all contracts requiring EVMS or C/SSR compliance.
Ballistic Missile Defense Organization (BMDO) Directive No. 5000 series, “Integrated Baseline Reviews,” directs that an IBR be conducted no later than six months following a contract award, or a significant contract modification, on contracts with Earned Value Management Systems (EVMS) Criteria or Cost/Schedule Status Report (C/SSR) requirements. The IBR is conducted jointly by the government and the contractor.
BMDO IBR Goals

BMDO 5004–H – IBR Goals
Program Manager Ownership of the PMB.

- Foster the use of Earned Value (EV) as a means of communicating the cost implications of technical and schedule problems.
- Provide confidence in the validity of contractor cost/schedule reporting.
- Identify areas of risk (cost, schedule, and technical performance) associated with the PMB.
- Involve technical specialists and contract analysts in the IBR process.
IBR Phases

Initial Phase: Planning and Team Building

Intermediate Phase: Prepare & Train for the IBR

Review Phase: In-plant Activities

Final Phase: Using EVM to Manage
Initial Phase - Planning & Team Building

IBR Planning Schedule

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Contract Award</td>
<td>0 days</td>
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<tr>
<td>2</td>
<td>Initial Phase</td>
<td>46 days</td>
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<tr>
<td>3</td>
<td>IBR Strategic Planning</td>
<td>20 days</td>
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<tr>
<td>4</td>
<td>Develop IBR Handbook</td>
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<td>5</td>
<td>Start the Draft IBR Handbook</td>
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<tr>
<td>6</td>
<td>Prepare the Draft IBR Handbook</td>
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<tr>
<td>7</td>
<td>Finish the Draft IBR Handbook</td>
<td>0 days</td>
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<tr>
<td>8</td>
<td>Build the Review Team</td>
<td>8 days</td>
</tr>
<tr>
<td>9</td>
<td>ID CWBS Review Strategy</td>
<td>10 days</td>
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<tr>
<td>10</td>
<td>Draft Orientation Schedule</td>
<td>10 days</td>
</tr>
<tr>
<td>11</td>
<td>Draft the In Plant Agenda</td>
<td>10 days</td>
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<tr>
<td>12</td>
<td>Collect Sample EVMS &amp; CA Docs</td>
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<tr>
<td>13</td>
<td>Intermediate Phase</td>
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<td>14</td>
<td>Finalize the Review Team</td>
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<tr>
<td>15</td>
<td>Assign CWBS review teams</td>
<td>5 days</td>
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<tr>
<td>16</td>
<td>Finalize the IBR agenda</td>
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<tr>
<td>17</td>
<td>Finalize the IBR Handbook</td>
<td>4 days</td>
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<td>18</td>
<td>Finalize team logistics</td>
<td>5 days</td>
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<tr>
<td>19</td>
<td>IBR Team Orientation</td>
<td>3 days</td>
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<tr>
<td>20</td>
<td>IBR Team Training</td>
<td>5 days</td>
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<tr>
<td>21</td>
<td>Prepare for In-plant activities</td>
<td>15 days</td>
</tr>
<tr>
<td>22</td>
<td>IBR</td>
<td>0 days</td>
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</tbody>
</table>
IBR Phases

Initial Phase: Planning and Team Building

- Build the review team
- Identify CWBS review strategy
- Draft orientation schedule
- Draft the In-plant agenda
- Collect Contractor EVMS material
Initial Phase - Planning & Team Building

Building The IBR Team

Team Leader: Program Manager
Senior EVM Specialist: IBR Subject Area Expert
IBR POCs: Manages IBR Logistics
Review Group Leaders: Conducts IBR
Technical Staff: SOW Experts
EVM Staff Support: Supports Review Group
Other Government: DCMA
Support Contractors: Integral IBR Team Member
Initial Phase - Planning & Team Building

Collect Sample Contractor Data

- CWBS
- CWBS Dictionary
- Program Organizational Structure
- Responsibility Assignment Matrix
- Work Authorization Documents
- Master Schedule
- Control Account Plans
- Current CPR & CFSR
- Detailed Control Account Schedules
- EVM System Description
- Subcontractor Data
- Basic Contract
- POOO Mods
- EVMS Surveillance Reports
IBR Phases

Initial Phase: Planning and Team Building

Intermediate Phase: Prepare & Train for the IBR

- IBR Team Orientation & Training
- Assign CWBS review teams
- Prepare for In-plant activities
- Finalize team logistics
- Finalize the IBR agenda
Intermediate Phase - Prepare & Train

Preparing the Contractor

• Contractor’s experience with the IBR process?
• Have they been prepared for CAM discussions?
• Do CAMs understand the basis of estimate/agreed-to work scope, schedule, and budget?
• Is this the first meeting between the contractor and the government team?
• Has the contractor and the program office prepared for a successful IBR?
Intermediate Phase - Prepare & Train

Preparing Yourself

• Know your CWBS assignments
  – Be familiar with scope, schedule, budget

• Know your strengths and weaknesses?
  – How well do you know
    • the contract?
    • the contractor?
    • the CAM(s)?
    • How are your EVM skills?

• The multi-functional Team (Cost, Schedule, Technical) is an opportunity to transfer knowledge and experience
Intermediate Phase - Prepare & Train

Training

- IBR Policy and Process
- Fundamentals of earned value management
- Fundamentals of scheduling
- Performance Measurement Baseline & EV Techniques
- Contractor’s earned value management system
- Control Account’s work authorization documents, network schedule, and resource allocation
- CAM discussion dynamics
- Moot IBR CAM Discussions
IBR Phases

Initial Phase: Planning and Team Building

Intermediate Phase: Prepare & Train for the IBR

Review Phase: In-plant Activities
- Kick-off meeting
- Review IBR Objectives
- Document Review
- CAM Discussions
- Daily Out Briefs
- Document Results
- Follow-up as necessary
Review Phase – In-plant Activities

• TECHNICAL ASSESSMENT
  • What are the High Risk Areas?
  • Conditions of Measurement?
  • What are the Technical Requirements?

• WORK AUTHORIZATION
  • Schedules
  • Budget Authorization
  • Control Account Plans (CAP)

• SCHEDULE ASSESSMENT
  • Underdeveloped Logic
  • Illogical/Forced Sequencing
  • Lack of Experience
  • Consideration of Technical Risks

• BUDGET ASSESSMENT
  • Budget Validity/Risk
  • Distribution Logic
  • Management Reserve
  • Undistributed Budget

• WORK ASSESSMENT
  • Which tasks may be overstated?
  • Which tasks may be understated?
  • What has been left out?

Areas for Discussion

Review Phase – In-plant Activities
Review Phase – In-plant Activities

CAM Discussions – CAM Interview

• Interview Activities
  – In the CAMs work area
  – Confirm control account work packages accurately summarize assigned CWBS requirements
  – Data Traces – Scope, Schedule, and Budget
  – Identify and Document Risk

• Don’t
  – Provide Guidance, Debate or Disagree with CAM
  – Enter side discussions
  – Exceed allotted interview time – schedule follow-up sessions if needed
IBR Outcomes

• Improved technical understanding of PMB sufficiency (at all levels)
• A “documented” account of PMB review findings
• An “action list” to tackle near-term cost, schedule and technical concerns
• Improved communications between the Program Office, DCMA and the Contractor
IBR Phases

Initial Phase: Planning and Team Building

Intermediate Phase: Prepare & Train for the IBR

Review Phase: In-plant Activities

Final Phase: Using EVM to Manage
- Periodic PMB Analysis
- Identify Risk Areas
- Contract Baseline Changes
- Validity and Limitation Issues
- Subsequent IBRs
Final Phase - Using EVM to Manage

Rolling Wave Planning Concept

• Detailed planning of all of the contract tasks is usually not possible at the start of the contract.

• Detailed planning is done in increments or “waves”.

• Once the nearest term work is completed, the next “wave” of work is detail planned, and then the next, etc.

• Subsequent IBRs may be required as the contract matures and major efforts transition from summary level planning to detailed planning
Final Phase - Using EVM to Manage

Ongoing Baseline Validity and Realism

• Validity
  – PMB still represents goals and objectives
  – PMB points to valid variances
  – Variances result in management action
  – Timely Incorporation of Contract Changes
  – Use of MR and UB

• Realism
  – PMB changes made for management reasons not for reporting reasons
  – Use of Over-target Baselines
  – Use of Single Point Adjustments
IBR Benefits

• Early insight to technical sufficiency of the PMB
  – Tests the relationship between SOW/SOO and WBS
  – Assures planning and budgeting are accurate at the cost account level
  – Reviews available performance information to assure objective and meaningful reporting of technical status

• Preparatory activities provide value
  – government and contractor personnel meet for training
  – contractor briefs their system
  – government program managers improve their familiarity with contractor processes and earned value data