



# The Integrated Baseline Review

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# IBR Policy Story

DoD 5000.2-R - 10 June 2001

## 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.

**Who**

**What**

**Where**

**When**

**Why**

# **BMDO IBR Policy**

**BMDO 5004-H – May 1998**

**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

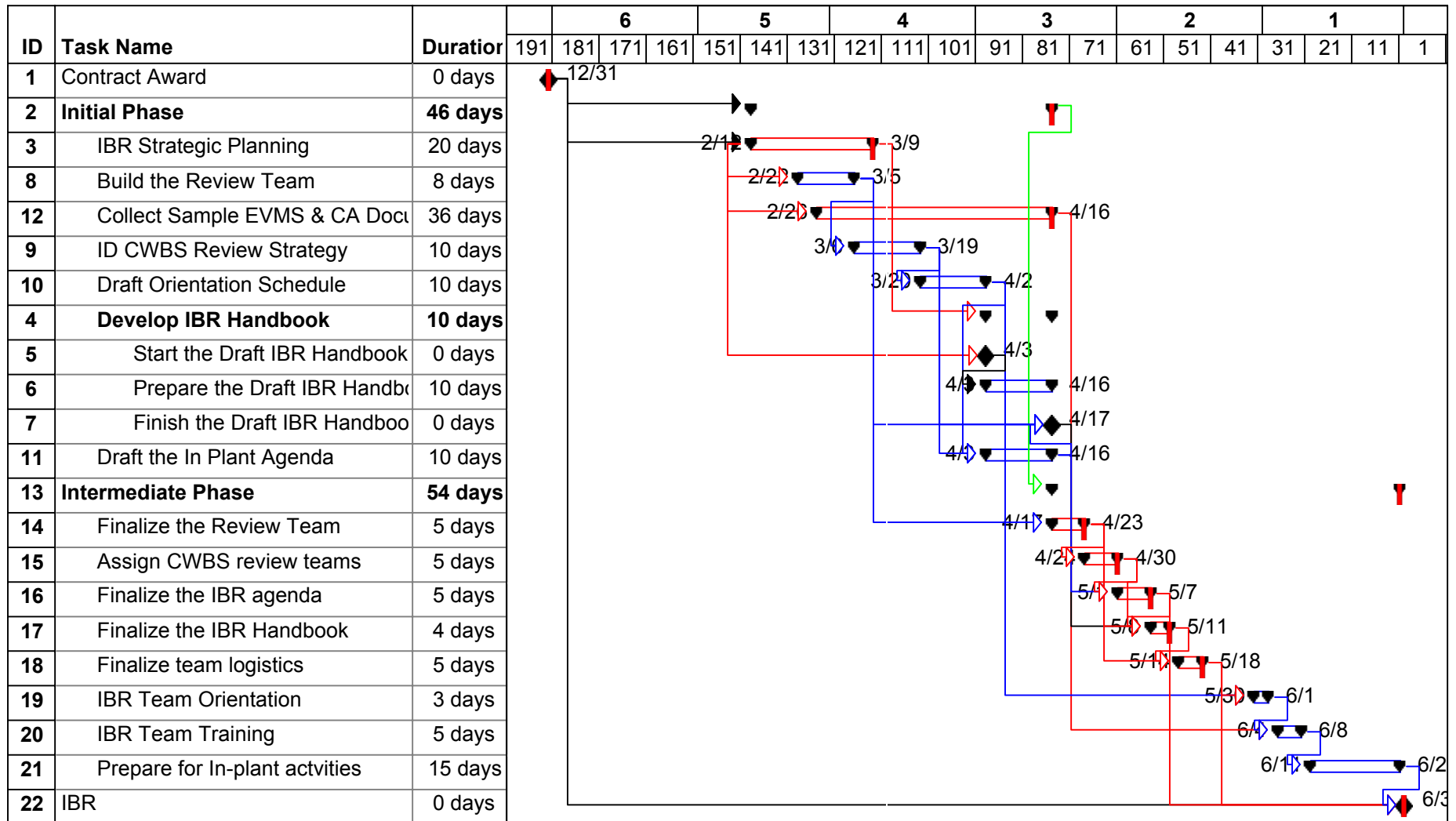
Intermediate Phase: Prepare & Train for the IBR

Review Phase: In-plant Activities

Final Phase: Using EVM to Manage

# Initial Phase - Planning & Team Building

## IBR Planning Schedule



# **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

<b>Team Leader:</b>	<b>Program Manager</b>
<b>Senior EVM Specialist:</b>	<b>IBR Subject Area Expert</b>
<b>IBR POCs:</b>	<b>Manages IBR Logistics</b>
<b>Review Group Leaders:</b>	<b>Conducts IBR</b>
<b>Technical Staff:</b>	<b>SOW Experts</b>
<b>EVM Staff Support:</b>	<b>Supports Review Group</b>
<b>Other Government:</b>	<b>DCMA</b>
<b>Support Contractors:</b>	<b>Integral IBR Team Member</b>



# 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

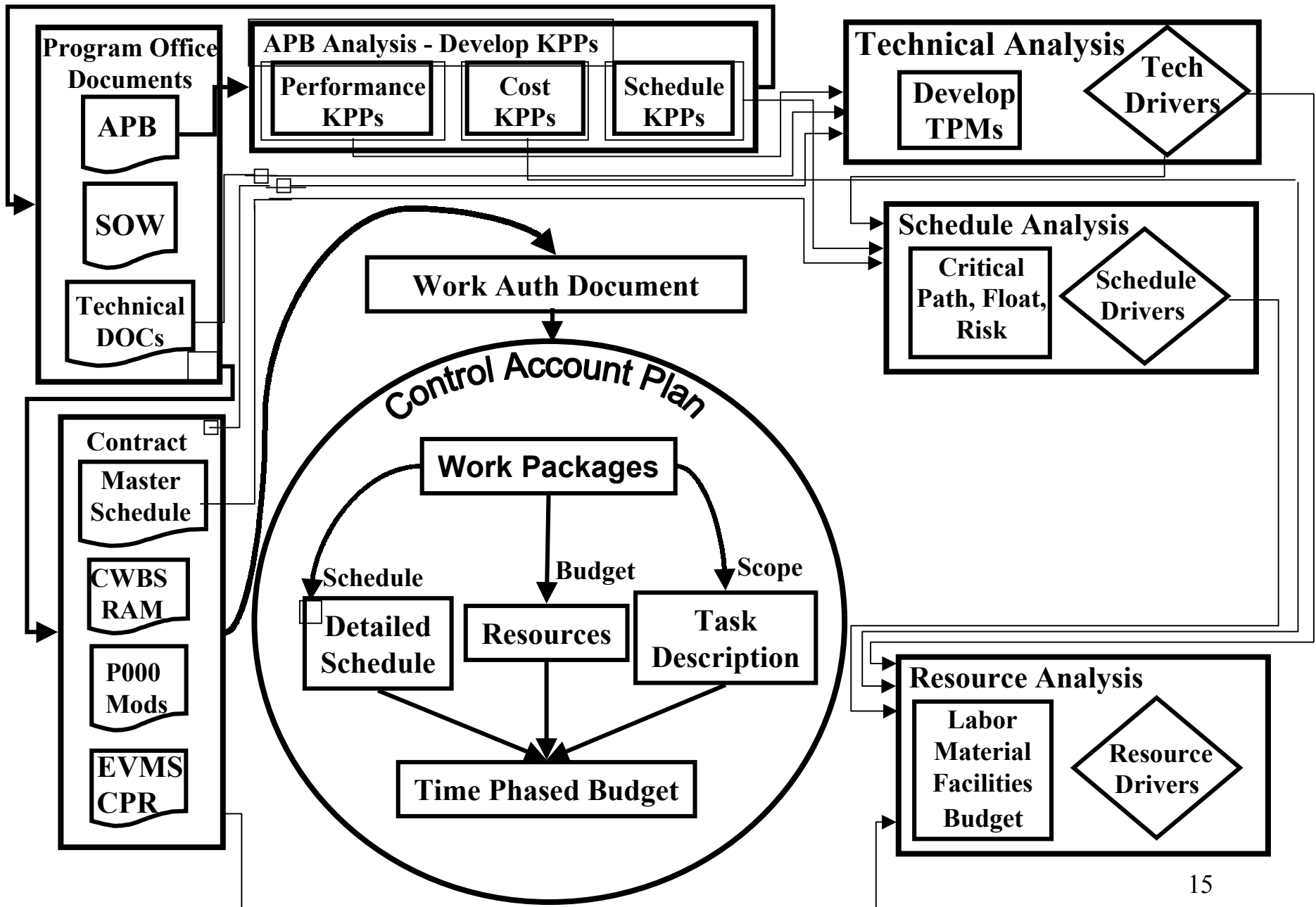
Initial Phase: Planning and Team Building

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**

# Document Review

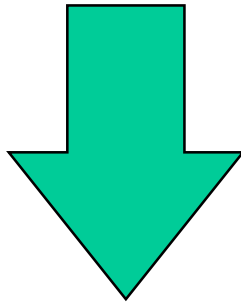


# Review Phase – In-plant Activities

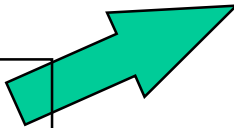
## Areas for Discussion

### • TECHNICAL ASSESSMENT

- What are the High Risk Areas?
- Conditions of Measurement ?
- What are the Technical Requirements?

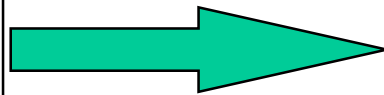


- WORK AUTHORIZATION
- Schedules
- Budget Authorization
- Control Account Plans(CAP)



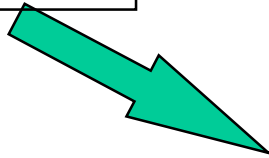
### • SCHEDULE ASSESSMENT

- 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?



# **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

