Integrated Baseline Review

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IBR Spectrum

System Audit
“SAR”

“Check the Block”
IBR “SAR”

• At one end of the spectrum is the IBR “SAR”
• It carries the IBR name but:
  – It is run by the C/SCS cultists or consultants
  – It is System Description oriented
  – It is document oriented
  – It is trace oriented
  – It is a SYSTEM REVIEW
IBR “Check the Block”

• At the other end is the “Check the block”
• It carries the IBR name but:
  – There is no real check of the contract scope of work tie to the program plan
  – There is no real check of the schedule’s major interdependencies
  – There is no real check of the a realistic resource allocation
  – There is minimal reaction to identified risk
Current Status Against The Spectrum

SAR IBRs

Check the Block
What Is Needed

• IBR early in program
  – If there is a delay, it generally is a warning sign
  – Delays cost money
  – Contractor hasn’t had time to get ready
    • IBR approach incorrect
• Critical in-depth review of the plan
  – Good for customer
  – Good for contractor
  – Focus on content not grammar
Improvements - Possible Step Approach for IBR

- Identify plan (IMP)
- Identify schedule (IMS)
- Investigate resource loading
- Investigate performance measurement approach

- Investigate communication approach
- Investigate baseline control
- Investigate forecasting
- Risk identification
- Expectation leveling
Identify Plan

• What are contract requirements
• What are customer expectations based on proposal/negotiations
• How has contractor ensured the explicit and implicit requirements are met
• How has contractor integrated any subcontractors in the plan
• Where is the risk in the plan (technical)
Identify Schedule

• Are tasks identified to support the plan (including subcontractors)
• Are the tasks logical and provide continuity
• Are the tasks identified to an organization
• Are the needed interdependencies identified between tasks
• Where is the risk in the schedule
Investigate Resource Loading

- Are the labor and material estimates consistent with the associated tasks (including subcontractors)
- Is the organization staffing consistent to their tasks’ estimates
- Are the rates (labor, overhead, etc.) appropriate for the organization
- What resource (cost) risks are there
Investigate Performance Measurement Approach

- What portions of the plan are critical
- What techniques are used by the contractor and subcontractors to measure the performance on those portions of the plan
- What is the risk on the Performance Measurement approach
Investigate Communication Approach

• How does the contractor internally communicate programmatic items
• How is the contractor planning to communicate externally
  – Customer, vendor, subcontractor
  – IPTs, functionally, weekly, monthly, etc
• How does the contractor link cost, schedule, risk and technical
Investigate Baseline Control

• Funding, Contract Mods, Re-planning, and OTBs
  – What are the processes and controls
  – What is linkage to plans, schedules and resources
  – What is impact on performance measurement
  – How are they communicated
• What is the risk in the Baseline Control approach
Investigate Forecasting

- How, who and when
  - Techniques, detail, and risk incorporation
  - Engineering, manufacturing and subcontractors
  - How often, cycle time, and thresholds for updates
- What is the risk in the forecasting approach
Risk Identification

• Identify the risks from above
  – Technical
  – Schedule
  – Cost
  – Performance Measurement
  – Communication
  – Baseline control
  – Forecasting

• How can the risks be mitigated
Expectation Leveling

• Customer expectations
  – Wants a Lincoln, contractor should be able to make a Sable
• Contractor expectations
  – Knows how to build an Escort, might be able to make a Taurus
Challenge To All Of Us

• An IBR is a joint effort
• A good IBR expands that joint approach
  – Contractor gains insights on their customer and receives a free health check
  – Customers gain insights on their contractors and gain assurance that there won’t be any surprises
• Outcome can be a win-win situation for all