



The Integrated Baseline Review (IBR)



The IBR management review is concerned more with the technical planning aspects and understanding how a contractor manages a project than past reviews that focused on audit and validation of a contractor's total system compliance with the EVM System Guidelines. These compliance reviews have been replaced by more streamlined EVMS reviews that give the contractor options on accomplishing compliance certification.

The intent of DOD leadership is to have its procuring agencies perform IBRs from a set of stated goals and objectives that are handed down through policy memos, letters and Service Component guidance documents. DOD guidance for the [IBR](#) process is contained in DOD Program Managers Guide to the Integrated Baseline Review Process.

The purpose of an IBR is to confirm that the contract **Performance Measurement Baseline (PMB)** covers the entire technical scope of work, that the work is realistically and accurately scheduled, and that the proper amount and mix of resources have been assigned to accomplish all contractual requirements. The assumption is a realistic PMB naturally leads to effective management of acquisition efforts. An IBR may produce disagreements, but the contractor cannot fail an IBR. When system concerns surface, the PM will refer them to the respective **Contract Management Office (CMO)** that has been delegated overall system surveillance responsibility.

At the conclusion of this lesson, you will be able to recall the purpose, objectives and team composition for an IBR.



IBR Policy

DODI 5000.2 (Operation of the Defense Acquisition System) Table E3.T2. (Regulatory Information Requirements) requires program managers to accomplish Integrated Baseline Reviews (IBR). The Defense Acquisition Guidebook, Para. 11.3.1.3 states that the purpose of the IBR is for PMs and their technical staffs to evaluate contract performance risks inherent in the contractor's planning baseline and it requires this evaluation be initiated within 6 months after contract award for all contracts requiring EVMS compliance.

The major change from past government management reviews was the shift of management systems review from the Comptroller/Finance area to the Program Manager and the technical staff. This had the effect of moving the review focus on cost/schedule system mechanics to a more pragmatic and integrated cost/schedule/technical management application based on the judgments of the ultimate information user, the Program Manager and the technical staff.



IBR Objectives and Benefits

IBR Objectives:

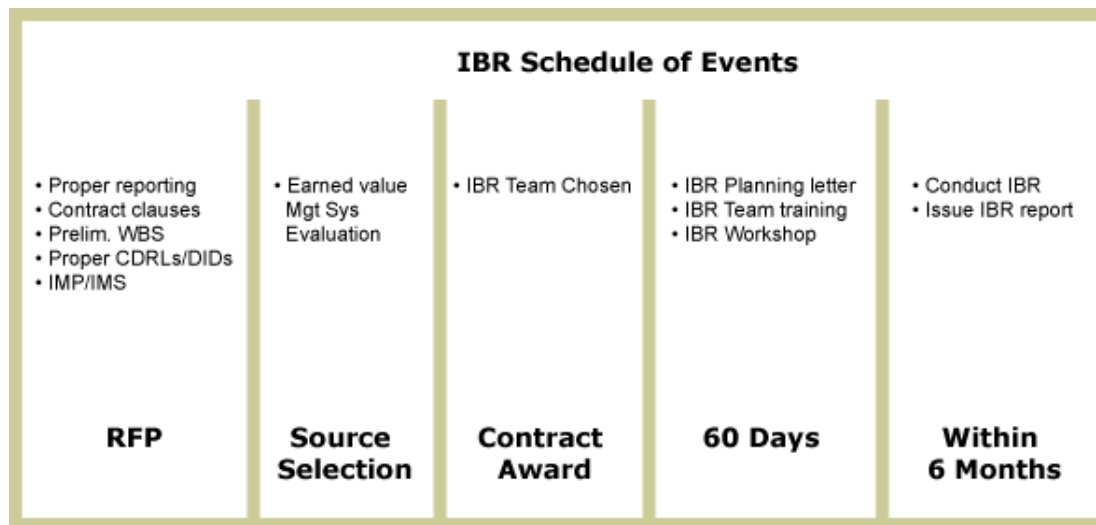
1. Technical scope of work is fully included and consistent with authorizing documents.
2. Key schedule milestones are identified.
3. Supporting schedules reflect a logical flow to accomplish the technical work scope.
4. Resources (budgets, facilities, personnel, skills, etc.) are adequate and available for the assigned tasks.
5. Tasks are planned and can be measured objectively, relative to technical progress.
6. Underlying PMB rationales are reasonable.
7. Managers have appropriately implemented required management processes.

IBR Benefits:

1. Lays a solid foundation for mutual understanding of project risks.
2. Provides an invaluable opportunity to compare PMs' expectations, and to address differences before problems arise.
3. Provides project management teams with a thorough understanding of the project plan and its risks, allowing early intervention and the application of resources to address project challenges.
4. Increases confidence in the project PMB, which provides a powerful, proactive, program management capability to obtain timely and reliable cost and schedule projections.



Figure 17-1: IBR Schedule (Flowchart)



What are some of the activities or events in the IBR process? **Figure 17-1** lists the events that lead to the IBR, including pre-contract events.

Long Description

Figure 17-1: IBR Schedule (Flowchart) is really a table that lists detail in the IBR Schedule of Events: RFP: Proper Reporting, Contract clauses, Prelim. WBS, Proper CDRLs/DIDs, IMP/IMS. Source Selection: EVM system evaluation. Contract award: IBR team chosen. 60 days: IBR planning letter, IBR team training, IBR workshop. Within 6 months: Conduct IBR, issue IBR report.



IBR Preparation

IBR Preparation by the Government is critical. Pre-contract award activities include ensuring proper program and financial management reporting requirements are included in the request for proposal. The source selection evaluation factors should include an evaluation of the contractor's proposed earned value management system and how it will be used to manage the technical, schedule, and cost efforts of the procurement.

The IBR should occur as soon as the performance measurement baseline is in place. Every effort should be made to initiate the IBR Process not later than six months after contract award. Initial planning for the IBR includes team selection and an IBR planning letter to the team and contractor prior to the start of the review.

The IBR requires "up-front" involvement of the Program Manager and technical staff with training support from the staff support organizations. Program Office technical staff and other team members should be trained in the basics of earned value management, the contractor's management control system, including live data examples, and an IBR preparation session prior to the contractor plant visit. Adequate preparation is essential to ensuring a successful IBR.

Control Account Managers (CAMs) and other senior managers meet with IBR team members to discuss their detail planning of work, with team members noting their findings and concerns as each day progresses. As the Team Chief, the Program Manager assesses the review progress with the team and contractor on a daily basis.



IBR Team Composition

IBR team members should be identified based on their programmatic or technical expertise, as required for the review. Disciplines include program management, business management, subcontract management, and technical management (e.g., system engineering, software engineering, manufacturing, integration and test engineering, and integrated logistics support). When appropriate, the team should include subcontractor personnel. The resulting size and composition of the team should reflect the PMs' objectives, expectations, and risk assumptions. A typical IBR team would include:

- Program Manager or Deputy PM as Team Leader
- Senior Staff EVMS specialist as Deputy Team Chief
- Program Office technical staff or IPT (i.e. eng, mfg, quality, log, other)
- Program Office and EVMS specialists (as required)
- Contractor representative(s) (Program Manager's discretion)
 - DCMA personnel
 - DCAA personnel



Pre-IBR Tasks

The following actions should take place prior to the start of the review.

1. The Team Chief and Deputy Team Chief should meet, shortly after contract award, with the contractor program manager and key staff to discuss the IBR strategy including tentative dates for the IBR
2. Collect contract information including contract/program name, period of performance, contract number, contractor address, award date, contract price/cost, contract type, subcontract information and other pertinent information
3. Team Members should be identified including program office technical and financial personnel, local DCMA and DCAA personnel, and key contractor focal points
4. Contact DCMA and DCAA to determine if there are any outstanding earned value management system problems
5. Request copies of the contractor's system documentation and start tailoring training material with this information
6. Prepare an IBR notification letter for the team members and the contractor, that includes review dates, team members, review conduct, documentation required and any other pertinent information
7. Conduct IBR training and workshops to prepare the team before the review start. Review the initial submittals of the Cost Performance Report (CPR) or Cost/Schedule Status Report (C/SSR) (if available)



Review Unique Information

The individual team member can benefit by collecting information and documentation that will be used to conduct a specific IBR:

1. The Integrated Master Plan/Integrated Master Schedule (IMP/IMS)
2. The Work Breakdown Structure (WBS)
3. IPT or CAM Specific Information
 - o SOW Extract
 - o Schedule Extract
 - o WBS Dictionary Extract (if applicable)
 - o Control Account Plans
4. Agenda for the Review including CAM Discussion schedule

SUMMARY: The key to the success of the IBR is the enthusiastic involvement and support of the Program Manager from the outset. When properly implemented, the IBR should result in resolving baseline problems early in the contract. This early resolution of baseline problems could also eliminate the need for some EVMS compliance reviews (SAR or Baseline Reviews only). Program Manager "ownership" of the IBR will improve the use of contract Earned Value Management data by government and contractor managers.

See further guidance on IBRs at the following link:
<http://www.acq.osd.mil/pm/ibrmats/ibrmats.htm>



Integrated Baseline Review Knowledge Review

The IBR process:

- Was approved as appropriately representative of both the MIL-STD 429 and TPM
- Is consistent with the prime contractor's corporate profit goals and cost sharing
- Was approved as combining shareholder interests with corporate profit goals
- Was implemented to ensure that the technical content of work packages and cost accounts is consistent with the contract scope of work, the CWBS, and the CWBS dictionary

Correct. The IBR process was implemented to ensure that the technical content of work packages and cost accounts is consistent with the contract scope of work, the CWBS, and the CWBS dictionary.



End of Lesson

You must click the **Next** button in order to receive credit for this lesson.