

Kelly Meassick, PMP® / Candi Randolph, PMP Charter Performance Management Group, LLC



This is the 12th in our series of interviews with business executives, government officials, academics, and project managers published in the PMI NAC Newsletter.

Our goal is to present leading ideas and insights on the practice of project management for our readers.



Kelly Meassick

Candi Randolph

Kelly Meassick and Candi Randolph are the principals of the Charter Performance Management Group, LLC, a firm that specializes in earned value management (EVM) and project / program management.

In this interview – Kelly and Candi discuss the key factors that matter to customers in the government and private sectors when it comes to making hard decisions on how to initiate and execute compliant EVM programs required to satisfy government regulations on these practices in the current business environment.

Kelly and Candi were interviewed for the PMI-NAC Newsletter by Don Ross, PMP

Charter Performance Management Group specializes in earned value management and project/program management. The firm uses a comprehensive set of standardized methodologies, ANSI/EIA 748 compliant policies and procedures, and industry best practices to achieve repeatable success in every engagement.

Experienced, certified consultants work closely with clients to minimize implementation and maintenance costs by tailoring solutions to specific requirements and goals of the organization. The firm's consultants understand the unique requirements of government agencies. The Principals at Charter Performance have managed/supported projects for the Department of Defense, Federal Agencies, and government contractors for more than 20 years. In addition to government customers, Charter's clients represent a wide variety of private sector industries, including engineering, manufacturing, pharmaceuticals, product development, and medical.

Charter Performance is a Project Management Institute (PMI®) Registered Education Provider (R.E.P.®) offering a variety of publicly available earned value management and project management classes.

Visit <http://www.charterperformance.com/> for more about Charter Performance Management Group.

PMI-NAC: *For our readers who may not be familiar with Charter Performance and the work you do – can you give us a high-level description of your business and what you do in it?*

Randolph: Charter Performance is a management consulting firm specializing in Earned Value Management and Enterprise Project Management consulting and training services. Many of our clients face government mandates to implement Earned Value Management Systems. They come to us for help in responding to these requirements in their proposal responses. That is, defining what to do and how to do it.

Meassick: We also help companies determine their readiness for EVMS implementation by assessing their current project management capabilities in terms of people, processes, and technology. We then identify the gaps in the current capabilities as measured against the American National Standards Institute (ANSI) standard for Earned Value Management Systems.

We use the identified capability gaps to develop an EVMS implementation plan that includes a plan for training personnel, developing or modifying business processes and procedures, implementing new tools, and applying the resulting system against one or more pilot programs before a full roll out to their major programs. We also provide both short-term and long-term staff augmentation, when that's needed.

Randolph: We've found that many clients do not have a structured project management methodology in place at the time that the requirements for Earned Value Management are realized. Because Earned Value management is a project management methodology and plugs easily into the Project Management Institute's Project Management Framework, we strongly encourage clients to incentivize their project and program managers to become certified Project Management Professionals (PMP).

Charter Performance provides Project Management Fundamentals classes, Project Management Professional Certification Boot Camps and Microsoft Project Scheduling classes to our clients and the public.

PMI-NAC: *My first exposure to Charter Performance was in late 2007 in an Earned Value Management Seminar. For those of us who are not as informed about this subject – can you provide a short explanation of what EVM means to us?*

Meassick: Earned Value Management (EVM) is a methodology for determining cost and schedule performance of a project by comparing planned work with accomplished work in terms of the dollar value assigned to the work. It serves as an early warning system and helps Program Managers and customers address the cost and schedule risks inherent in projects of all kinds.

Randolph: EVM cannot be achieved by simply installing a commercial software product; instead, it requires end-to-end business process development and an implementation that integrates the company's people, processes and technologies.

PMI-NAC: *What do we need to know and plan to do regarding EVM in the months and years ahead?*

Meassick: More and more government agencies, both DOD and Federal civilian, are requiring EVMS. We see an increase in the number of RFPs that reference DFARS 252.242.7001 or FAR 52.234-4 which state that companies who do not have a certified EVMS – must submit a comprehensive plan for compliance with the EVMS criteria.

Randolph: In their proposal response, companies are required to describe the Earned Value Management System they intend to use during the contract; describe the “GAPS” between their existing management system and the proposed, compliant system; describe how their management system meets the intent of the ANSI/EIA 748 EVMS Standard 32 Guidelines; and describe how they will flow-down EVMS requirements to subcontractors.

Meassick: One of the biggest challenges that companies face is just getting started. We suggest companies do a gap analysis against the ANSI Standard and then prepare an implementation plan before the RFP is released – so they will know where they stand and can respond more effectively and efficiently to the RFP requirement.

PMI-NAC: *In your years running Charter Performance, are there lessons learned about how to manage people, projects, and technology you can share with our readers?*

Meassick: *Do not procrastinate.* Research your future business opportunities and determine if you are going to face requirements for implementing an ANSI-compliant Earned Value Management System.

If you work with the government on a cost-reimbursable basis, you should start planning now and, at a minimum, have a gap analysis done and implementation plan prepared so that you can be responsive when the requirements appear in your RFP.

Because the implementation plan is based on the gaps the company has in meeting the requirements of the ANSI EVMS standard, the timeline for implementation will differ but it typically takes 12-18 months to fully implement EVMS processes and procedures needed to satisfy the ANSI standard.

Randolph: *Get Educated.* If you know your company will be implementing Earned Value Management, get educated on the ANSI standard. Learn how to implement an EVMS, how to create a compliant Performance Measurement Baseline, how to analyze and report performance, and how to manage change on an EVM project.

Meassick: *Prepare the organization for change.* Organizational change management is the most difficult aspect of an EVMS implementation. This is true of any large process change within an organization. If the company has recently completed an organizational change initiative such as CMMI or ISO, the impact of the changes required for EVM may not be significant.

Randolph: However, if the organization operates in a stovepipe environment where each program follows its own informal processes, then the change could be significant and the organization should take measures to prepare the people affected for the change to come.

PMI-NAC: *Given your experience with and understanding of the project technical management frontier and your business supporting education in that area – what excites you most about the opportunities and challenges in the years ahead?*

Randolph: We feel that continued industry standardization of project management processes and industry adoption of these processes is vital to improving overall project management success rates. Earned value management is a standardized methodology that has been practiced by large defense contractors for more than 30 years – but it's still relatively new to the general project management community.

When Earned Value Management originated in the 1960s – it was based on the federal government's Cost/Schedule Control System Criteria. In the 1990s, ownership of the criteria moved from government to industry with development of the ANSI-748 Standard for Earned Value Management Systems.

The PMI Project Management Body of Knowledge (*PMBOK® Guide*) describes a solid project management framework which can be extended to incorporate the 32 guidelines found in the EVMS standard. Recently, PMI also introduced two new certifications for scheduling and risk – both are key components needed to manage projects effectively using earned value management techniques.

Meassick: The standardized approach is what makes EVM effective for the government to assess a program's true cost and schedule status and performance.

As with any standard, education is the paramount criterion to successful implementation and institutionalization – and certification ensures that a common understanding of the standards is achieved.

Candi Randolph is a Principal at Charter Performance Management Group, LLC. She has more than 20 years of Project Management and EVMS implementation experience. Candi began her career in the Aerospace and Defense industry where she was the project manager and lead engineer for the design, development and implementation of a custom EVMS.

In 1996, Candi began a 10-year consulting engagement with the Defense Finance and Accounting Service (DFAS) in Indianapolis where she managed large-scale IT programs. She currently provides consulting and training services to companies implementing EVM Systems. Candi holds a B.S. degree in Computer Science and is certified by the Project Management Institute as a Project Management Professional.

Kelly Meassick is a Principal at Charter Performance Management Group, LLC. She has more than 20 years of experience in the areas of program management, EVM, consulting and training. Kelly works with clients during proposals and after contract award to develop compliant, EVM-related artifacts, such as the Work Breakdown Structure, Organizational Breakdown Structure, Integrated Master Schedule, Control Account Plans, and the Performance Measurement Baseline.

Kelly also performs EVMS Compliance Assessments, develops and implements compliant EVM systems, and trains clients in earned value management. She has co-founded three successful businesses with core competencies in the areas of program and performance management, software development, security products, and consulting. Kelly is certified as a Project Management Professional (PMP) by the Project Management Institute. She holds an MBA from Auburn University and a Bachelor of Science degree in Management Information Systems from the University of Alabama in Huntsville.

Thanks to Kelly Meassick, PMP, and Candi Randolph, PMP, of Charter Performance Management Group, LLC, for discussing the work they do supporting clients related to earned value management and project management in this interview published in the PMI-NAC Newsletter.

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