

# Origin of the Integrated Baseline Review <sup>1</sup>

**Wayne Abba**

In the early 1990s, the Department of Defense experienced a series of project management disasters. The Navy A-12 Avenger II stealth bomber and Air Force C-17 Globemaster transport and B-2 Spirit stealth bomber had huge cost overruns, all of which were foreseeable using standard EVM analysis. Yet all too often, my office, located in the Pentagon's Office of the Secretary of Defense, was the first to identify (or acknowledge) the performance problems despite the data having been analyzed by the contractors, their project management customers, and the military department oversight organizations.

As the two senior people responsible for Defense policy and implementation of contract cost and schedule performance management, my boss (the late Gary Christle) and I spoke often about the issue. The data reported to us every three months on the largest Defense contracts came from the contractors' EVM systems, which had been reviewed in detail by the military departments in accordance with our policy. I was the lead analyst and by this time had participated in a number of EVMS reviews with each Service and analyzed data from dozens of contracts on major projects.

The EVMS reviews provided assurance that the data were good. Why then was our office often the first to sound an alarm? We identified two main reasons:

1. The EVM specialists in the military departments were too far removed from the projects and had no stake in the contract outcomes. Their concern was compliance with checklists, and their own individual preferences. As years passed, they became more and more prescriptive rather than following the intent of the EVM guidelines. The EVMS reviewers set impossibly high standards of perfection – in one extreme case, the Navy EVM organization refused to review a shipyard until the contractor could produce an EVM system description that was acceptable to a Washington bureaucrat who had not visited the yard. It took four years. The resulting description was a generic document, produced by a consultant, that mirrored the policy but didn't reflect how the yard actually managed ship construction.
2. As a result, Defense project managers had no sense of ownership for the processes used to manage their contracts.

---

<sup>1</sup> How to cite this article: Abba, W. (2024). Origin of the Integrated Baseline Review, commentary, *PM World Journal*, Vol. XIII, Issue III, March.

Christle and I decided to use the Pentagon's program approval process to attack the problem. We had been moved from the DoD Comptroller organization to Acquisition, where we found support from our senior leaders. When Donald Yockey was appointed the Under Secretary of Defense for Acquisition in 1991, he quickly discovered that our office was a reliable source of information on contract performance.

A new Army program for Theater Air Defense was scheduled for a Defense Acquisition Board (DAB) review. We prepared an Acquisition Decision Memorandum (ADM) for the Milestone I approval, which would allow the Army to award a development contract. We included a provision for the project manager to conduct a "technical baseline review" within six months, with the expectation that it would change the focus of EVMS reviews from compliance to management, with reporting as a by-product. The goal was to achieve mutual understanding by contractor and customer of the contract scope and risk, as well as the schedule and resources needed to execute the contract. I alerted the late Bill Smart, the project controls specialist in the Program Executive Office (PEO), to what was coming.

When the ADM was ready for signature, we forwarded it to the Under Secretary's office. Christle was away when it reached the Principal Deputy, who summoned me to meet with him and the Director of Procurement. They questioned the term "technical baseline review," concerned that it would be too narrowly focused to achieve our objective. I suggested we use "integrated" instead, to emphasize the strength of EVM as the core integrating discipline for project and contract management. They agreed and so it was done.

A few years ago, the College of Performance Management interviewed several of us to capture stories of EVM's history and evolution. Here's Bill Smart describing his role in the creation of the IBR. He didn't know the detail about the IBR naming decision; he and I had initially agreed with TBR.

<https://www.youtube.com/watch?v=vBZz0a8XN3s>

The name and the process have stood the test of time. The IBR is codified in US government procurement regulation and was described by the former president of the National Defense Industrial Association as "the smartest thing you guys ever did."

## About the Author



### **Wayne F. Abba**

Michigan, USA



**Wayne Abba** is an independent consultant in program and project management. For 17 years before retiring in 1999, he was the senior program analyst for contract performance management in the Office of the Under Secretary of Defense (Acquisition & Technology). He was a volunteer expert advisor to the US Government Accountability Office team that published the “Cost Estimating and Assessment Guide: Best Practices for Developing and Managing Capital Program Costs,” and “Schedule Assessment Guide: Best Practices for Project Schedules.” He is (twice) Past President, College of Performance Management.

Semi-retired but still active, Wayne is currently a member of a Program Management Improvement Team advising the U.S. National Nuclear Security Administration’s Office of Safety, Infrastructure and Operations. He also serves on the board of the Graduate School Japan, a nonprofit organization that provides training and consulting services to Japan government ministries, including planning for management of the Fukushima nuclear plant decommissioning. His voluntary work with the National Science Foundation includes membership on several project review panels ranging from conceptual through final design reviews.

Wayne can be contacted at [wayneabba@aol.com](mailto:wayneabba@aol.com)