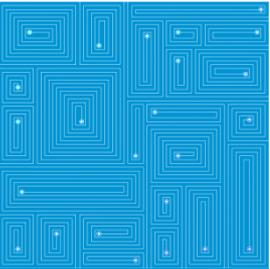
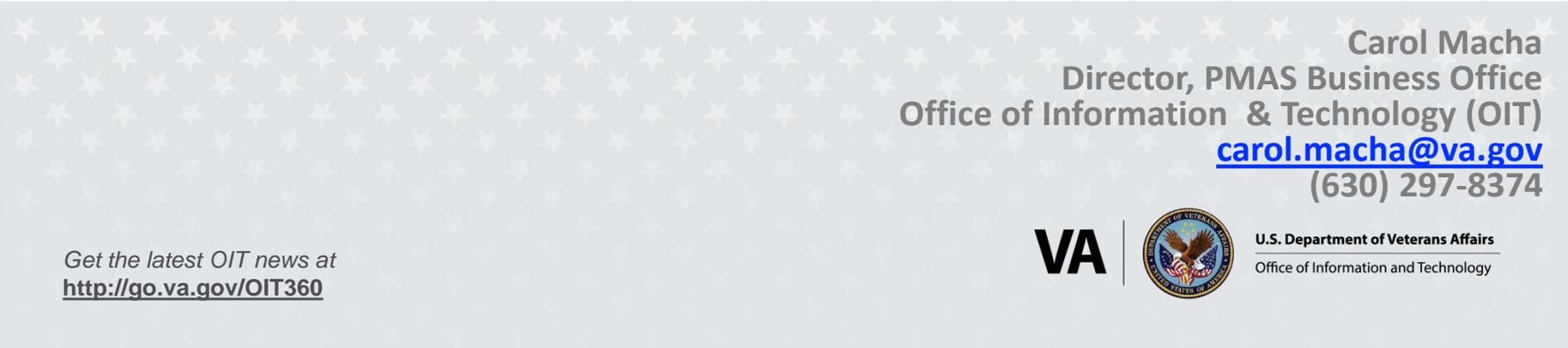




OFFICE OF
INFORMATION
AND TECHNOLOGY



Project Management
Accountability System (PMAS)
Guide
4.0 Webinar



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VA



U.S. Department of Veterans Affairs
Office of Information and Technology

Live Meeting Logistics

- To benefit from the presentation as much as possible, please do the following:
 - Download a copy of the PMAS Guide 4.0 from the handout feature of this LiveMeeting
 - Mute your phone
 - Plan for an hour and a half of training
 - Turn off your screen saver or move your mouse periodically during the presentation
 - Email any questions to VAPMAS@va.gov

Welcome and Introduction

- **Presenter**

- **Carol Macha**

- Director, PMAS Business Office

- Office of Information and Technology (OIT)

- **Purpose**

- To introduce *Project Management Accountability System (PMAS) Guide 4.0* to the user community

What's New in PMAS 4.0

- Clarification of all PMAS principles
- Creation of PMAS States Life Cycle
- Creation of Milestone 0, 1, 2, 3, and 4 Reviews
- Clarification of the Active state
- Addition of reporting requirements by PMAS state
- Addition of required reviews by PMAS state
- Addition of Green Flags
- Addition of Yellow Flags
- Clarification of definitions: moved execution information out of the definitions section
- Addition of tables for all Artifacts required by State

Targeting Value Through On-Time Delivery

- PMAS achieves value through the execution of two processes:
 - *Ensure Readiness* process via Milestone Reviews
 - *Ensure Performance* process via Risk Management
- Accountability throughout the PMAS life cycle enables the *Ensure Readiness* and *Ensure Performance* processes to reach the target goal of on-time delivery of IT capabilities



PMAS Is Mandatory VA Policy

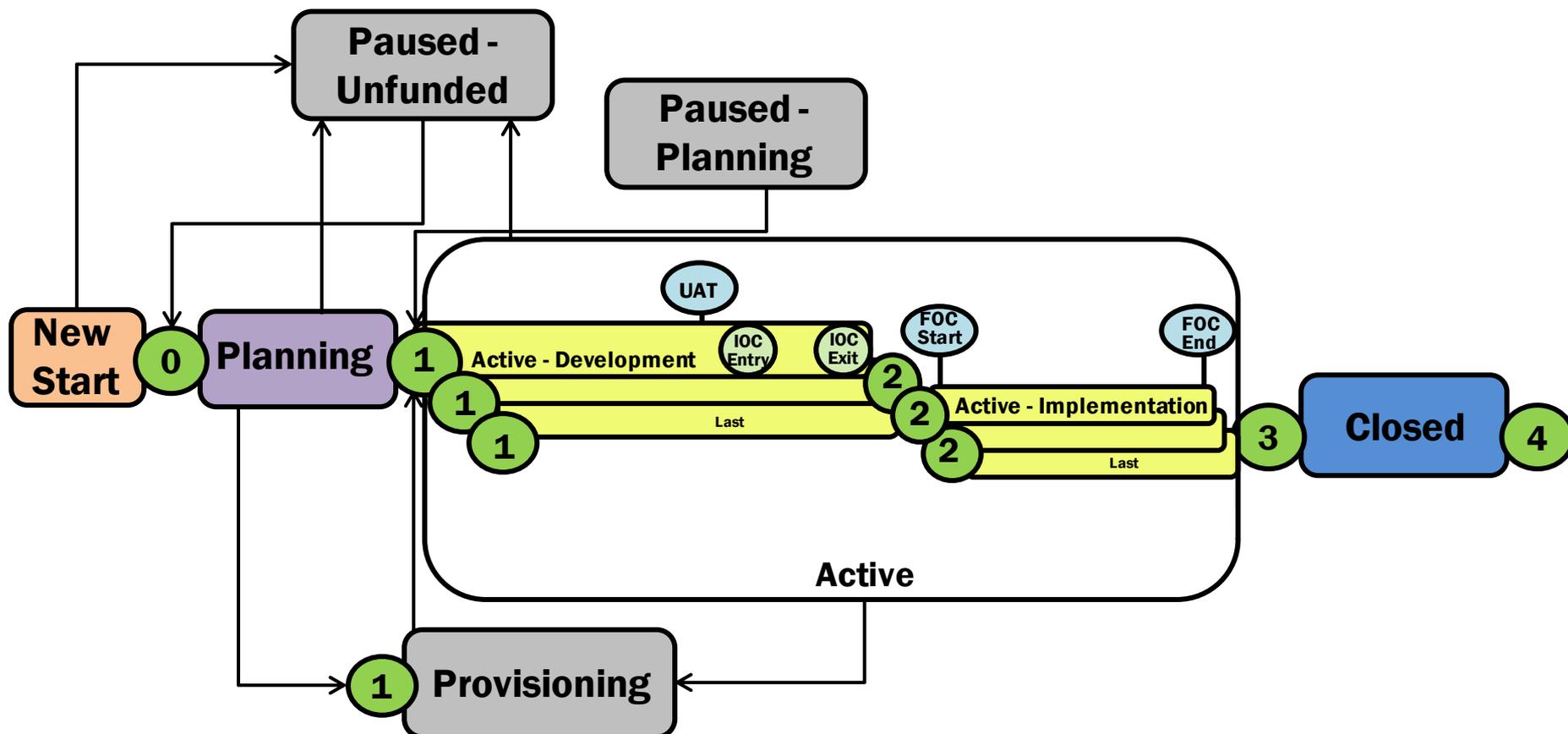
- *PMAS Guide 4.0* was signed by Stephen Warren on November 7, 2012
- This guide is the single standard and source for protocol on managing IT development projects under the PMAS methodology, and its use is ***mandatory***

PMAS Principles

- PMAS projects are built on incremental development
- PMAS relies on integrated teamwork
- PMAS emphasizes resource management
- PMAS enforces accountability
- PMAS enables transparency
- PMAS directly engages senior leadership
- PMAS requires direct and continual participation by the customer community
- PMAS emphasizes Agile practices

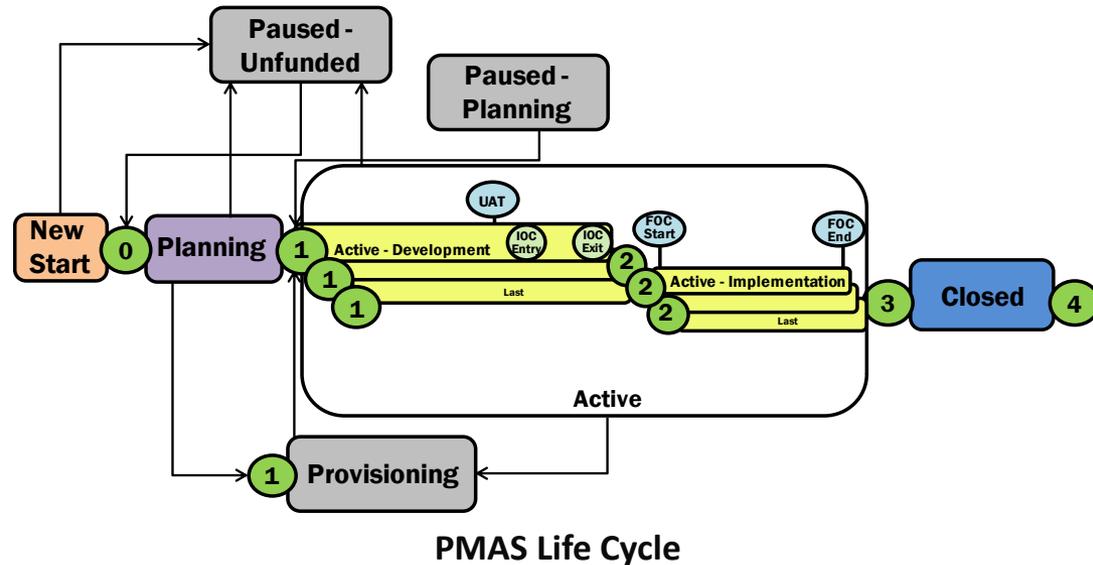
PMAS Life Cycle

- The state of a project is determined by position it currently holds in the PMAS life cycle

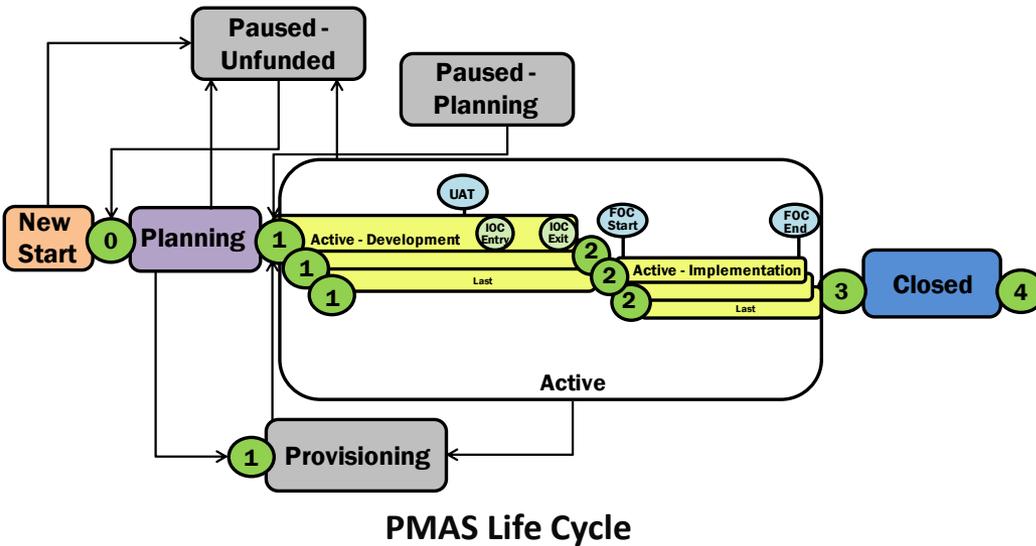


Definition of the PMAS Life Cycle

- PMAS Life Cycle begins at New Start and ends at the end of the Closed state
- Arrows show entry and exit from standard to conditional PMAS states



Active State



- There are two types of increments in the Active state:
 - **Active Development** = development and initial delivery
 - **Active Implementation** = full deployment or national rollout
- Projects enter the Active state via a Milestone 1 Review.
- Projects enter Active Implementation (or deployment) via a Milestone 2 Review.
- Projects enter the PMAS closed state via a Milestone 3 Review.
- Increments apply to the Active state only.

Increment Development and Implementation

- Increments must:
 - Be six months or less
 - Have milestones defined by the project team
 - Have a customer-facing increment deliverable at the end of the increment
 - Introduce new or enhance existing IT capabilities within the VA
 - Exist only in the Active state

Required Artifacts Tables

- *PMAS Guide 4.0* includes tables in Sections 5.3 to 5.6, that list the artifacts required to/for:
 - Enter the Planning state
 - Enter the Active state
 - Complete an increment
 - Enter the Closed state.
- Tables list the required documents and identify who must approve/sign them.

Purpose of Milestone Reviews

- Provides a mechanism for the senior leadership of each Office of Responsibility (OOR) to verify and validate that a project is ready to move forward
- Ensures the OOR is ready to commit the resources necessary for project success
- Validates the completion of required PMAS artifacts
- Assures the commitment of all of the OIT to the projects success

Types of Milestone Reviews

- Milestone 0 Review (MS 0)
 - Project enters into Planning state
- Milestone 1 Review (MS 1)
 - Project enters into Active State (from Planning, Paused, or Provisioning)
 - For subsequent increments
- Milestone 2 Review (MS 2)
 - Product is ready for deployment
- Milestone 3 Review (MS 3)
 - Project finishes all product deployment and enters into the Closed state
- Milestone 4 Review (MS 4)
 - Project has completed all close out activities

Milestone 0 Review

Milestone 0 Review (MS 0)

- Required for Project to enter into Planning state
 - Enter from the New Start state or Paused-Unfunded

Approval granted by the Assistant Secretary for Information Technology (AS/IT) or designee

Milestone 1 Review

Milestone 1 Review (MS 1)

- Required for Project to enter into Active state
 - Entry from the Planning, Paused, or Provisioning state
- Required for each subsequent increment

Approval granted by the AS/IT or designee for the initial increment

Milestone 2 Review

Milestone 2 Review (MS 2)

- Required for increments to begin national deployment
 - Entry occurs after the increment has finished all development work, IOC testing and/or user acceptance testing (UAT)
 - Must have a Milestone 2 review for every increment deployed or you may have one Milestone 2 Review if all parts of the product deploy at the same time

Approval granted by the AS/IT or designee

Milestone 3 Review

Milestone 3 Review (MS 3)

- Required for projects that have completed full product deployment and are entering the Closed state
 - Review is held at the project level to certify that the product has fully deployed and is transitioning to sustainment

Approval granted by the AS/IT or designee

Milestone 4 Review

Milestone 4 Review (MS 4)

- Required for projects that have completed the Closed state
 - Review must occur 30 days after completion of the Milestone 3 Review
 - Certifies that the project has completed all close out activities

Approval granted by the AS/IT or designee

Scheduling a Milestone Review

- The Project Manager is responsible for scheduling with the PMAS Business Office (PBO) via an email to PMAS Reviews mailbox (VAPMASReviews@va.gov). The email should include:
 - Name of the Project
 - Type of Review requested
 - Current PMAS state
 - Name of Project Manager.
- Requests for a review should be submitted as far in advance as possible.
- The Project Manager is responsible for completing the MS Review template and send to VAPMASReviews@va.gov no later than two business days prior to review.

Scheduling a Milestone Review (continued)

- The PMAS Business Office is responsible for the following:
 - Coordinating with the Project Manager to schedule the Milestone Review
 - Sending the template to the Project Manager
 - Setting up the meeting logistics
 - Sending out the meeting invitation
 - Running the Live Meeting
 - Capturing the Action Items and Observations during the Review

Keep in Mind...

- Schedule Milestone Reviews with the PMAS Business Office via VAPMASReviews@va.gov
- Plan ahead to ensure a timely review date
- Send Required Template to PMAS Business Office via VAPMASReviews@va.gov; no less than two business days in advance
- Read *PMAS Guide 4.0* to ensure you are PMAS compliant
- Invite all necessary personnel, such as your Business Sponsor and key Integrated Product Team (IPT) members (esp. those from Architecture, Strategy, and Design (ASD) and Service Delivery and Engineering (SDE))

Keep in Mind...

- Ensure all project information has been loaded into the PMAS Dashboard prior to your Review
- Upload all required documentation into the proper document repository (TSPR or WITS)
- Make sure your project schedule is current, and information in the dashboard matches your quad chart (e.g.,. Project Cost, Sponsor, schedule, etc.)
- Arrive prepared to respond to any questions senior leadership may ask. Be prepared to explain Risk Mitigation strategies

Flag and TechStats Overview

- The system of colored flags and the TechStat meetings provide management visibility and/or the opportunity to timely resolve issues before a milestone or Increment is missed.
- TechStat meetings provide management visibility into the root cause of a missed milestone or increment delivery.
- The PMAS Business Office acts as the facilitator.

Flags and TechStats Overview (continued)

- Green, Yellow, and Red Flag Project Review meetings are scheduled weekly, pending senior leadership availability.
- Generally, Green, Yellow and Red Flag Project Review meetings are scheduled for an hour on Wednesdays at 10 AM.
- TechStat Meetings are scheduled as requested pending senior leadership availability and project issue urgency.
- Generally, TechStat meetings are scheduled for an hour or more as needed and requested.

Flags and TechStats Overview (continued)

- The OIT AS/IT Assistant Secretary or the Principal Deputy Assistant Secretary (PDAS) will be present at all meetings.
- All members of the IPT for any highlighted project should be invited to the meeting; (*Phone conferencing and Live Meeting is available*).
- All meetings are facilitated by the PMAS Business Office.
- CIO Action Officers are also be present to provide meeting minutes and action items from senior leadership.



Green Flags

A Green Flag identifies that a *significant achievement* of a milestone or increment has been met; Green Flags are shared during Green, Yellow and Red Flag Project Review meetings to promote communication of repeatable processes and best practices.

- Green Flag Criteria
 - Early completion of a milestone and/or increment
 - Significant and/or positive event that warrants visibility to the VA Secretary, e.g., monetary savings for the project
 - New or innovative approach to successful completion of milestone and/or increment that can be used as Best Practice(s) for other OIT projects
- Can be raised during all PMAS states
- Submissions must be sent by email to VA PMAS Flags distribution list (VAPMASFlags@va.gov).



Yellow Flags

Yellow Flags provide situational awareness to senior leadership of changes in the project environment that have the potential to increase the level of acceptable risk.

- A Yellow Flag can be raised by any member of the IPT.
- Yellow Flags may be raised in all PMAS states.
- Yellow Flags will be included in the weekly Green Flag, Red Flag, and TechStat Project Report as information only and will not be discussed during the weekly Green Flag and Red Flag Project Review.
- Submissions must be sent by email to VA PMAS Flags distribution list (VAPMASFlags@va.gov).



Yellow Flag Categories

Yellow Flag Category	Description
Critical Personnel Resources Turnover	Any changes to personnel resources that are critical to successful project execution such as Business Sponsor, Project Manager, Solution Architect, Business Analyst, Contractor PM
IPT Membership Change and/or Performance Issues	Any changes to the business SMEs; Lack of sufficient participation by IPT members; Lack of representation by any key stakeholder organization in the IPT
Requirements Changes	Any significant change to the business and/or technical requirements that can impact the successful project execution
Change in Acquisition / Contract Strategy	Changes to the contract type; modification to the existing contract
Change in the Funding Status	If project adjusted or lost future/current year's funding.
Change in Architecture & Technical Environment	Any need to change the solution architecture; technology platform used; the technology vendor; any new technical dependency; significant risks in the setup of technical (development, testing, or preproduction) environments; as well as changes to the hosting location, and CRISP impact.
Dependencies' Delay / Issues	Delay or issues impacting any project upon which your project is dependent.
Significant Change in Development Team Composition and/or Competency	Any significant change in the composition and/or competency of the development team (Government or vendor).
Missed Inter-Increment Key Milestone (UPMs)	Any missed inter-increment milestone date that does not threaten the increment 's completion date.



Red Flags

A Red Flag is an opportunity for senior leaders to resolve an issue or risk that jeopardizes a project from moving forward.

- Red Flags can be raised by any member of the IPT.
- Red Flags should be raised as early and often as possible.
- Red Flags will remain in Open or Paused status until an issue resolution is determined or the AS/IT or PDAS accepts the risk.
- Submissions must be sent by email to the Red Flag Mailbox. (VAPMASFlags@va.gov).
- All GF/YF/RF meetings will follow a Green Flag, Red Flag, and TechStat Project Report agenda that will be distributed to the invite NLT noon the day before the meeting.

X TechStat Meetings

A TechStat Meeting is a forum at which senior leaders are presented the root cause for a project's missed increment deliverable date or baseline date. TechStats only apply to Active state projects. Any member of the IPT may request a TechStat meeting.

- TechStat Meetings are held with the AS/IT or PDAS to present:
 - Major challenges and causes of variance from project schedule
 - Summary of risks, mitigation strategies, and clear accountability
 - Revised acquisition strategies for contracts, to include stronger controls for existing contracts
 - Corrective actions to move forward with the project
 - Impact on other dependent projects
- Submissions must be sent by email to VA PMAS TechStat distribution list (VAPMASTechStat@va.gov).

X TechStat Meetings Outcomes

- TechStat meetings result in either a **strike** or a **missed milestone** decision by the AS/IT or PDAS.
- A **strike** occurs at the increment level; it is caused by a missed increment deliverable date; strikes are issued only to projects in the Active state.
- Upon issuance of three strikes the AS/IT or PDAS will evaluate the project for entry into the Paused-Planning state or Closed state.
- A **Missed Milestone** is declared when the AS/IT or PDAS evaluates the project and decides that the missed milestone or increment was not due to the PM's fault and therefore should not receive a strike.



Scheduling a TechStat Review

- The Project Manager is responsible for scheduling with the PMAS Business Office (PBO) via an email to PMAS Reviews mailbox (VAPMASTechStat@va.gov). The email should include:
 - Name of the Project
 - Current PMAS state
 - Name of Project Manager.
- Requests for a TechStat should be submitted as far in advance as possible.
- The Project Manager is responsible for completing the TechStat Review template and send to VAPMASTechStat@va.gov no later than *two business days* prior to review.

PMAS Dashboard

The Project Management Accountability System (PMAS) Business Office and Systems Made Simple (SMS) are developing the improved PMAS Dashboard (DB) for release in February 2013



UNITED STATES
DEPARTMENT OF VETERANS AFFAIRS

PMAS Dashboard Home
Project Management Accountability System

PMAS Dashboard PMAS Tools

Welcome

Welcome to the PMAS (2.0) Dashboard. Here you will find news and announcements from the PMAS Business Office.

PMAS system tools!

PMAS News

Title

[Product Development Television \(PDtv\) Focuses on PMAS Business Office](#)

This month, PDtv turned the spotlight on the Project Management Accountability System (PMAS) Business Office with a new episode in its ongoing series on the PD Business Office. View the new episode on the PDtv homepage!

Featuring Carol Macha, Director of the PBO, this episode explores the reasons for the creation of PMAS, and the challenges of product delivery. Carol also takes time to explain the PBO and some developments on the horizon.

Watch the New Episode!

As we continue to point the camera across PD, we look forward to hearing your feedback. We want your suggestions on all things PDtv. Please leave a comment on the PDtv homepage comments section.

[PMAS Business Office \(PBO\) Announces New Yellow Flag Categories](#)

The Project Management Accountability System (PMAS) Business Office (PBO) instituted Yellow Flags in May 2012 to provide early warning of project problems. Any project member can raise a Yellow Flag to provide situational awareness of changes in the project environment that have the potential to increase the level of acceptable risk. To support the...

DEFINITIONS
Yellow Flags (YF): A change in the project environment that indicates a danger likely to happen. The resulting risks will have significant impact on project execution.
Red Flags (RF): Significant issues that have happened or are about to happen whose proper management requires intervention by the S...

PMAS Dashboard—Our Data Engine

- PMAS Dashboard project data provides senior leaders with an enterprise perspective for PMAS execution.
- Senior leaders make informed decisions based on:
 - Available data
 - Accurate data
 - PMAS-compliant data.

New Dashboard Homepage

The screenshot shows the PMAS Dashboard homepage. At the top left is the Department of Veterans Affairs logo and the text "PMAS Dashboard Home Project Management Accountability System". Below this is a navigation bar with "PMAS Dashboard" and "PMAS Tools". A "Welcome" section features a globe icon and a message: "Welcome to the PMAS (2.0) Dashboard. Here you will find news and announcements from the PMAS Business Office, and links to PMAS system tools!". To the right, a "Dynamic Trending Analysis" widget shows "Projects Date Made %" with a "Last 12 Months Cumulative Average" of 84.2% and a "Change" of 3.3% (indicated by a green upward arrow). Below the welcome message is a "PMAS News" section with a "Product Development Television (PDtv) Focuses on PMAS Business Office" article. On the right side, there is a "PMAS Tools" sidebar with links for "Enter New Project", "Manage Existing Project", "Reports & Data", "Management Reviews", and "EPS". At the bottom, there is a "Yellow Flag Categories" table.

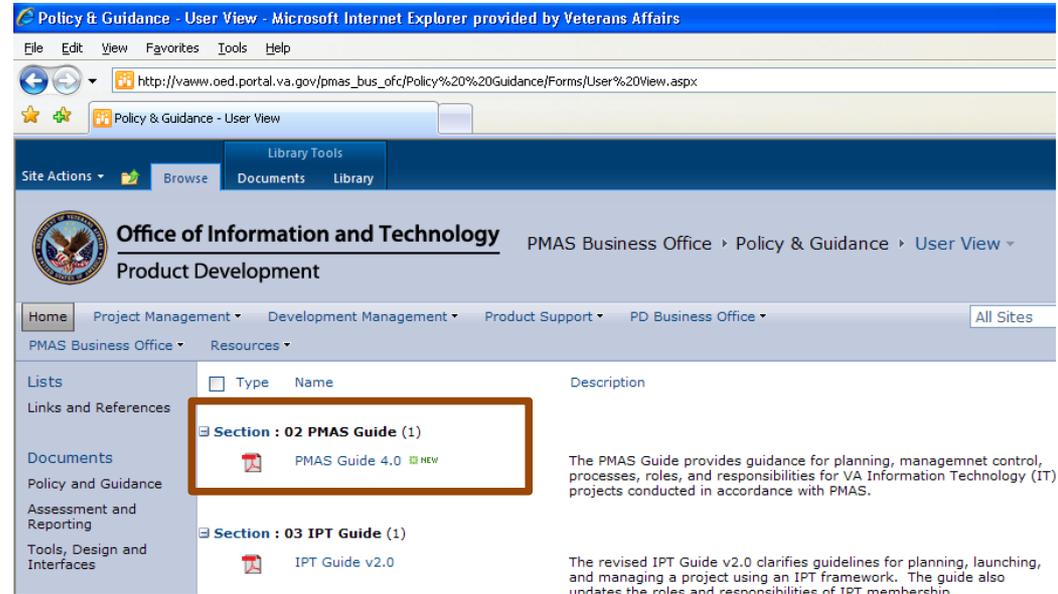
Dynamic Trending Analysis showing up to date project completion percentage

Home page announcements and news updated as needed

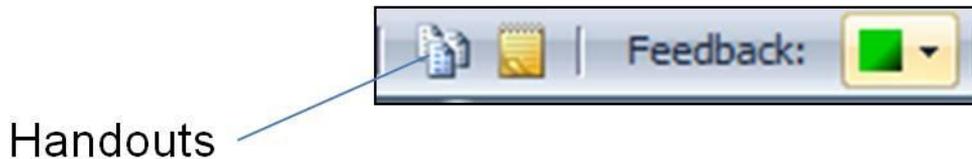
Yellow Flag Category	Description
1. Critical Personnel Resource Turnover	Any changes to personnel resources which are critical to successful project execution such as Business Sponsor, Project Manager, Solution Architect, Business Analyst, etc.

Where Can I Find the PMAS Guide?

- <http://go.va.gov/PBO>
- For any PMAS Guide 4.0 questions, comments or suggestions:
 - Contact: PMAS Business Office (PBO) at:
VAPMAS@va.gov



The screenshot shows a web browser window displaying the "Policy & Guidance - User View" page. The page is titled "Office of Information and Technology" and "Product Development". The main content area shows a list of documents under the heading "Section : 02 PMAS Guide (1)". The document "PMAS Guide 4.0" is highlighted with a red box. The description for this document is: "The PMAS Guide provides guidance for planning, management control, processes, roles, and responsibilities for VA Information Technology (IT) projects conducted in accordance with PMAS." Below this, another document "Section : 03 IPT Guide (1)" is visible, with the document "IPT Guide v2.0" listed. The description for this document is: "The revised IPT Guide v2.0 clarifies guidelines for planning, launching, and managing a project using an IPT framework. The guide also updates the roles and responsibilities of IPT membership."



Questions and Answers

