IGE Management Process

July 19, 2021
IGE Program Management provides a deliberate, consistent, repeatable, & transparent process to manage national-level IGE efforts ensuring we deliver impact and maximize use of available resources in the service of our National Security.
IGE Program Management Outcomes

- Drive accountability to deliver intended impacts and contributions to the Strategic Plan
- Provide clear delineation of roles, responsibilities and process
- Recognize and Support Post, Region and COI local IGE efforts
- Identify top national priorities that serve a wider impact
- Mobilize resources to enable collaboration
  - SAME Members
  - SAME National Office Staff
  - SAME Partners and other stakeholders
  - External resources (academic, etc) as required
- Measure and communicate: celebrate impact, support recruiting and retention, share perspectives
## IGE Program Management Plan Development

### Phase I: Governance

<table>
<thead>
<tr>
<th>Activity</th>
<th>Target</th>
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<tbody>
<tr>
<td>Project Management Matrix (Workload Management)</td>
<td>3 QTR 21</td>
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<tr>
<td>Executive Committee Role (Determine Priorities)</td>
<td>3 QTR 21</td>
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<tr>
<td>Executive Advisory Group (EAG) Role (Government Perspective &amp; Needs)</td>
<td>4 QTR 21</td>
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<tr>
<td>Industry Role (Industry Perspective &amp; Needs)</td>
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<tr>
<td>Operationalize COIs (Expand technical member support for XC Priorities,</td>
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<td>Stakeholder management)</td>
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# IGE Program Management Plan Development

<table>
<thead>
<tr>
<th>Phase II: Management</th>
<th>Target</th>
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<tr>
<td>National Industry-Government Engagement Plan (NIGEP)</td>
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<tr>
<td><strong>Responsibilities</strong></td>
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<tr>
<td><strong>Collection, Identification of Issues (Pressing, Project Delivery, Joint Engineering)</strong></td>
<td>3 QTR 21</td>
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<tr>
<td><strong>Selecting Priority Issues</strong></td>
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<tr>
<td>Determining Impact, Task Organizing, Assignment</td>
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<td>Task, Project &amp; Initiative (TPI) Management</td>
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<td>Metrics (measuring impact)</td>
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<td>Other IGE Programs (COI initiatives, Post support, webinars, education, etc.)</td>
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<td>Communications (Reporting progress, Sharing perspectives, Celebrating impact)</td>
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<tr>
<td>Resource Strategy</td>
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*DEDICATED TO NATIONAL SECURITY SINCE 1920*
Overall National IGE Program Management

IGE Governance
- Identify or Collect proposed issues (Pressing, Project Delivery, Joint Engineering)
- Validate Issues
- Prioritize Issues

IGE Program Management Office
- Publish National IGE Plan
- Manage the Plan
- Evaluate the Plan
- Refine the Plan

Other IGE tasks (COI initiatives, Post support, webinars, education, etc.)
IGE Project Management
Communications (Reporting progress, Sharing perspectives, Celebrating impact)
Resource Management
XC: First Steps

• Develop Governance Input for IGE Management Process:
  – National IGE Tracking document (IGE Matrix)
  – National IGE Pressing Issue proposal criteria and format
  – National IGE Pressing Issue validation criteria
  – National IGE Pressing Issue prioritization process

• Evaluate current slate of National IGE Issues and Projects
Issue Collection

EAG Submits Pressing Issue

JEOC Warfighter Submits Pressing Issue

COI Submits Pending Issue

CEO/Presidents Roundtable Submits Pressing Issue

Post IGE Workshop Submits Pressing Issue

Previously considered Pressing Issues

Aligns w/ Specific COI?

YES

IGE PgM adds Issue to IGE Matrix

NO

Route to COI for coordination

YES

NO

COI submits joint Issue w/ Initiator?

NO

YES

1

3
**Pressing Issue Validation**

**Issue Validation**

1. XC conducts National IGE Plan development Session / Event

2. National Issue?
   - YES: Pass to Region, Post or COIs for consideration
   - NO: Reject, notify Submitter

3. SAME particularly positioned to impact?
   - YES: Can SAME create a positive impact?
     - YES: Identify Strategic Partners, other resources needed
     - NO: Reject, notify Submitter
   - NO: Reject, notify Submitter

4. External resources needed?
   - YES: Identify Strategic Partners, other resources needed
   - NO: Reject, notify Submitter

5. XC Identifies Strategic Goal alignment
   - STILL timely?
     - YES: Pass to Region, Post or COIs for consideration
     - NO: Reject, notify Submitter

6. XC validates pending Pressing Issues
   - Aligns w/ Strategic Plan?
     - YES: Pass to COIs for consideration
     - NO: Reject, notify Submitter

7. XC revalidates active Projects & previously considered Pressing Issues
   - STILL timely?
     - YES: Pass to Region, Post or COIs for consideration
     - NO: Reject, notify Submitter
Issue Prioritizing; IGE Project Assignment

1. XC Members score Pressing Issues
2. Prioritize Pending Pressing Issues based on score
3. Resources available for all Pressing Issues?
   - YES: XC Approves Project Intent Statements
   - NO: Select highest priority Pressing Issues for action
5. Log non-select Pressing Issues for future consideration, notifySubmitter
6. Resourced Pressing Issues assigned as Projects
7. XC Approves Project Task Organization
8. XC Chair Approves XC PM
9. AOF?
   - YES: XC PM establishes oversight with AOF/COI(s)/TF Team Leader; accountable for Project progress
   - NO: Multiple COIs or TF?
   - YES: XC Approves COIs; Team Leader
   - NO: TF?
   - YES: XC Approves TF members, Team Leader
   - NO: XC issues Letter of Appointment to Project Team Leadership

Dedicated to National Security Since 1920
Pressing Issue, IGE Project Management

3

AOF/COI/TF develops TPI Action Plan for XC Approval → AOF/COI/TF Submits Action Plan for XC Approval → Approved?

YES

NO

Resubmit to XC

YES

TF / COI Reports Progress → Task Complete?

YES

NO

Report Progress to XC

IGE PgM updates IGE Matrix → XC reviews NIGEP for approval → Approved?

YES

NO

Resubmit to XC

IGE PgM drafts & submits National IGE Plan (NIGEP) for XC approval → XC Deploys NIGEP

IGE PgM compiles reports, updates IGE Matrix for presentation to XC

XC Deploys TPI Results

4

IGE PgM documents active TPIs, Work Plans
### SAME Industry-Government Engagement (IGE) Projects Matrix

#### As of: 8/25/21 (Includes 6/29/21 EAG Pressing Issues)

<table>
<thead>
<tr>
<th>Issue / Project</th>
<th>Manager</th>
<th>XC Champion</th>
<th>Lead</th>
<th>IGE Team</th>
<th>Resources</th>
<th>Schedule</th>
<th>PMS Plan</th>
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#### JOINT ENGINEERING OPERATIONS

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#### CONFERENCES / WORKSHOPS

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IGE Pressing Issue Proposal Criteria and Format

• Electronic submission, similar to webinar request
• Required information:
  – Submitter information
  – Willingness to champion (commitment statement and proposed Project Manager)
  – Issue description, scope of proposed project
  – Impact: advocacy or education
  – Contribution to the 2025 Strategic Plan
  – Involved or requested parties, proposed team members (industry, government, academic, SAME COI, etc.)
  – Issue development to date (attach white papers, minutes of workshops, etc.)
  – Required resolution date (if applicable)
  – Endorsement by one: EAG Member, BOD Member, COI Chair or Post President
  – Industry, Government, or both
IGE *Pressing Issue* Validation Criteria

- Submission complete?
- DIRECTLY advances at least one of the five objectives of the 2025 Strategic Plan?
- SAME uniquely positioned to impact at a national level or other association(s) addressing or better positioned?
- Lobbying effort or lobbying dependent?
- National-level issue or city/county/state issue?
- Primary Federal Government stakeholders/decision-makers at the Departmental level?
**IGE Pressing Issue Prioritization Process**

• Necessary when resources are limited

• All XC Members score each issue:
  – 5 = best
  – 1 = worst
  – Considers XC member diversity, viewpoint, expertise, knowledge

• Criteria:
  – National Security Impact / Benefit
  – Government Impact / Benefit
  – Industry Impact / Benefit
  – EAG Priority
  – Other?
## Prioritizing Process (example XC Member scoring)

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Prioritizing Process (example Scoring Summary)

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<th>Order of Merit</th>
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- Produces an Order of Merit List (OML)
- Applies if resources are limited
XC: First Steps

• Develop Governance Input for IGE Management Process:
  – National IGE Tracking document (IGE Matrix)
  – National IGE *Pressing Issue* proposal criteria and format
  – National IGE *Pressing Issue* validation criteria
  – National IGE *Pressing Issue* prioritization process

• Evaluate current slate of National IGE *Issues* and *Projects*
Responsibilities

• XC
  – Execute IGE Governance Tasks

• XC Champion
  – Keeper of the XC’s Intent: Ensures XC’s intent is clearly communicated, met
  – Removes obstacles
  – Holds IGE PM accountable for progress, impact
  – Note: XC Project Champion – opportunity for future National Leader Development

• IGE Project Manager
  – Team leader, manages the project effort
  – Accountable for progress, impact
  – Leads collaboration between executing entities
  – Often Pressing Issue Initiator

• IGE Program Manager
  – Provides program continuity
  – Manage collection, validation and prioritization process
  – Project timeline, history
  – Reporting to XC
  – Support projects as necessary