

## Program Review Process

The goal is to schedule yearly Program Review (PR) on JCTDs after a major event and the data from the event is available. Where possible, the event should be an operational or technical demonstration.

To begin the process on a specific JCTD Steve Munt will provide the most current DFAS and Field Obligation and Expenditure data available to Ada Ononiwu. Ada will forward this Obligation and Expenditure data to the Oversight Executive (OE) along with the PR template and the Candidate Decision Board (CDB) briefing at the start of the month the PR is scheduled. The CDB briefing will be used as the baseline for the PR. The OEs should work with their JCTD teams to complete the template and Obligation and Expenditure charts and return it to Ada who will oversee the review process. In general, the review will consist of the following:

- OE returns completed PR template and Obligation and Expenditure charts to Ada within 10 working days of request.
- Ada will review the PR input for completeness ensuring that all areas are filled out properly, and then she will forward the completed PR for review and comment to Dan Petonito (Programmatic), Dan Kowalski (Financial) and Denise de la Cruz (Transition) who will return the form back to Ada in approximately 1 to 4 days. Ada will consolidate comments and forward them to the OE.
- OE will revise PR as necessary within 1 to 5 working days and forward updated PR template and Obligation and Expenditure Charts to Ada who will do a final review and obtain final coordination from Dan Kowalski and Denise de la Cruz.
- Once PR is coordinated Ada will forward completed PR template form to Mrs. Hicks for her review and work with the OE to provide responses to any comments/questions from Mrs. Hicks.

The completed PR template should be no more than 6 pages long. Make sure statements are concise and self-explanatory and don't indicate a problem without providing impact, and remedial action. In addition, if there are disagreements or varying views among the members of the JCTD management team they should be identified.

Spell out acronyms.

# Program Review Template

Month and Year of Review

**JCTD Acronym:**

Click here to enter text.

**JCTD Start**

Month and Year

**Oversight Executive:**

Click here to enter text.

**Date of Final OUA:**

Month and Year

**Status of ID: (If not fully signed, provide explanation, remaining issues and expected date.)**

Click here to enter text.

**Event Preceding Review and Outcome: (Preferably an operational or technical demonstration.)**

Click here to enter text.

**Using the 10% deviation rule from the Candidate Decision Review (CDR) briefing, identify any changes in:**

**Scope: (Explain changes since CDR, impact and, if necessary, remedial actions underway or planned.)**

Click here to enter text.

**Funding: (Explain change since CDR, impact and, if necessary, remedial actions underway or planned.)**

Total CDR Funding: OSD \_\_\_\_\_, Partner \_\_\_\_\_; Total Current Funding: OSD \_\_\_\_\_, Partner \_\_\_\_\_

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**Schedule: (Explain change since CDR, impact and, if necessary, remedial actions underway or planned.)**

Final OUA Data: CDR \_\_\_\_\_, Current \_\_\_\_\_

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**Overall Performance:** (Performance is an indication of the expected success of the JCTD. Are original goals being met? Is JCTD on track to meet the needs of the warfighter? Also use the 10% rule for performance (e.g. 48 hours to launch has deviated by 10%) to identify issues.)

Click here to enter text.

**Transition:**

**Status of TTA(S):**

Click here to enter text.

**Overall Status of Transition and Funding:**

Click here to enter text.

**Any Issues that may Prevent Transition:**

Click here to enter text.

DFAS Obligations and Expenditures data will be completed by the JCTD financial office prior to the PR. The field Obligations and Expenditures data will be completed by the JCTD Management Team as part of the PR.

| FROM DFAS REPORT AS OF - (Date) |                  |        |     |      |     |      |                 |
|---------------------------------|------------------|--------|-----|------|-----|------|-----------------|
| FY12 - MIPR #                   | Date Issued      | AMOUNT | OBS | OBS% | EXP | EXP% | Funds Remaining |
|                                 |                  |        |     |      |     |      |                 |
|                                 |                  |        |     |      |     |      |                 |
|                                 |                  |        |     |      |     |      |                 |
|                                 | FY12 TOTALS      |        |     |      |     |      |                 |
|                                 |                  |        |     |      |     |      |                 |
| FY13 - MIPR #                   | Date Issued      | AMOUNT | OBS | OBS% | EXP | EXP% | Funds Remaining |
|                                 |                  |        |     |      |     |      |                 |
|                                 |                  |        |     |      |     |      |                 |
|                                 |                  |        |     |      |     |      |                 |
|                                 | FY13 TOTALS      |        |     |      |     |      |                 |
|                                 | FY12-FY13 TOTALS |        |     |      |     |      |                 |

| FROM FIELD REPORT AS OF - (Date) |                  |        |     |      |     |      |                 |
|----------------------------------|------------------|--------|-----|------|-----|------|-----------------|
| FY12 - MIPR #                    | Date Issued      | AMOUNT | OBS | OBS% | EXP | EXP% | Funds Remaining |
|                                  |                  |        |     |      |     |      |                 |
|                                  |                  |        |     |      |     |      |                 |
|                                  |                  |        |     |      |     |      |                 |
|                                  | FY12 TOTALS      |        |     |      |     |      |                 |
|                                  |                  |        |     |      |     |      |                 |
| FY13 - MIPR #                    | Date Issued      | AMOUNT | OBS | OBS% | EXP | EXP% | Funds Remaining |
|                                  |                  |        |     |      |     |      |                 |
|                                  |                  |        |     |      |     |      |                 |
|                                  |                  |        |     |      |     |      |                 |
|                                  | FY13 TOTALS      |        |     |      |     |      |                 |
|                                  | FY12-FY13 TOTALS |        |     |      |     |      |                 |

**Obligations & Expenditures: (Provide summary of obligations and expenditures as compared to benchmarks and an explanation of Specific MIPRS below Benchmarks. See Appendix #1 for benchmarks.)**

Click here to enter text.

**Overall Status:**

|                                                                                                                                   | Status                   |                          |                          | Explanation               |
|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|---------------------------|
| <b>Funding</b>                                                                                                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <b>Cost</b>                                                                                                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <b>Schedule</b>                                                                                                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <b>Transition</b>                                                                                                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <b>Performance</b>                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <b>Overall</b>                                                                                                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Click here to enter text. |
| <i>Notes: 1. Provide brief explanation if yellow or red; 2. Performance is an indication of the expected success of the JCTD.</i> |                          |                          |                          |                           |

**Coordination:**

Dan Kowalski \_\_\_\_\_ Date: \_\_\_\_\_

Comment:

Denise De La Cruz \_\_\_\_\_ Date: \_\_\_\_\_

Comment:

Appendix #1: The below table indicate the obligation and expenditure benchmarks JCTDs should be meeting. For example, if you receive FY12 funding by May FY13 you should have obligated 97% and expended 73% of the funding.

| RDT&E Obligation & Expenditure Benchmarks - Year One |     |     |     |     |     |       |     |      |      |     |     |
|------------------------------------------------------|-----|-----|-----|-----|-----|-------|-----|------|------|-----|-----|
|                                                      | Nov | Dec | Jan | Feb | Mar | April | May | June | July | Aug | Sep |
| Obligations                                          | 15% | 22% | 30% | 37% | 45% | 52%   | 60% | 67%  | 75%  | 82% | 89% |
| Expenditures                                         | 8%  | 11% | 15% | 19% | 23% | 26%   | 30% | 34%  | 38%  | 41% | 45% |

| RDT&E Obligation & Expenditure Benchmarks - Year Two |     |     |     |     |     |     |       |     |      |      |     |      |
|------------------------------------------------------|-----|-----|-----|-----|-----|-----|-------|-----|------|------|-----|------|
|                                                      | Oct | Nov | Dec | Jan | Feb | Mar | April | May | June | July | Aug | Sep  |
| Obligations                                          | 90% | 91% | 92% | 93% | 94% | 95% | 96%   | 97% | 97%  | 98%  | 99% | 100% |
| Expenditures                                         | 49% | 52% | 56% | 59% | 63% | 66% | 70%   | 73% | 77%  | 80%  | 84% | 87%  |