



DEFENSE CONTRACT AUDIT AGENCY



2004

FOREWORD

An Open Message from the Executive Steering Committee . . .

We, the undersigned, are pleased to issue the 2004 update to our Strategic Plan. Significant progress has been achieved in the objectives carried forward from the last publication, and while we take great pride in our accomplishments, we also recognize that the Strategic Plan is a continuous journey with unexpected challenges bringing forth new goals in the future. This update reflects our acknowledgement of these challenges as well as DCAA's commitment to customer satisfaction, professional competence, cost effectiveness, productivity enhancements, and a quality of work-life environment.

Over the years we have grown to rely upon our Strategic Plan in many ways. Internally, we value it as a means to keep management and employees focused on our overall Mission -- to provide the Department of Defense with high quality audit and financial advisory services. Externally, we use it to sharpen our awareness of customer needs and to keep pace with customer expectations. In addition, our Strategic Plan is used to supplement high level DoD initiatives such as the Department's Balanced Scorecard Report and the President's Management Agenda.

Our 2004 Strategic Plan update contains new objectives for each of our 5 Goals. These new objectives cover a broad spectrum of process improvements, some of which include:

- Better techniques for understanding Quality of Work Life expectations
- Encouraging innovative ideas from the workforce
- Increasing electronic submissions from contractors
- Improving the audit process at multi-segment contractor locations
- Alternatives for high quality training
- Improving the Reimbursable Program
- Integrating Leadership Principles into the Agency culture
- Feasibility of a "Single Forum" Suggestion Program
- Improvements to the Intranet site
- Maximizing computer support services

Underlying our strategy for the future is the belief that we will continue to make a significant contribution to our National Defense needs. Building upon the strengths developed over the past 39 years, we remain steadfast in our commitment to serving the Government acquisition community and look forward to meeting the challenges before us.

William H. Reed, Chairman

Michael J. Thibault

Robert DiMucci

John M. Farenish

Edward F. Nelson

Earl J. Newman

Barbara C. Reilly

William R. Serafine

Michael E. Steen

April G. Stephenson

Francis P. Summers, Jr.

Jody A. Trenary

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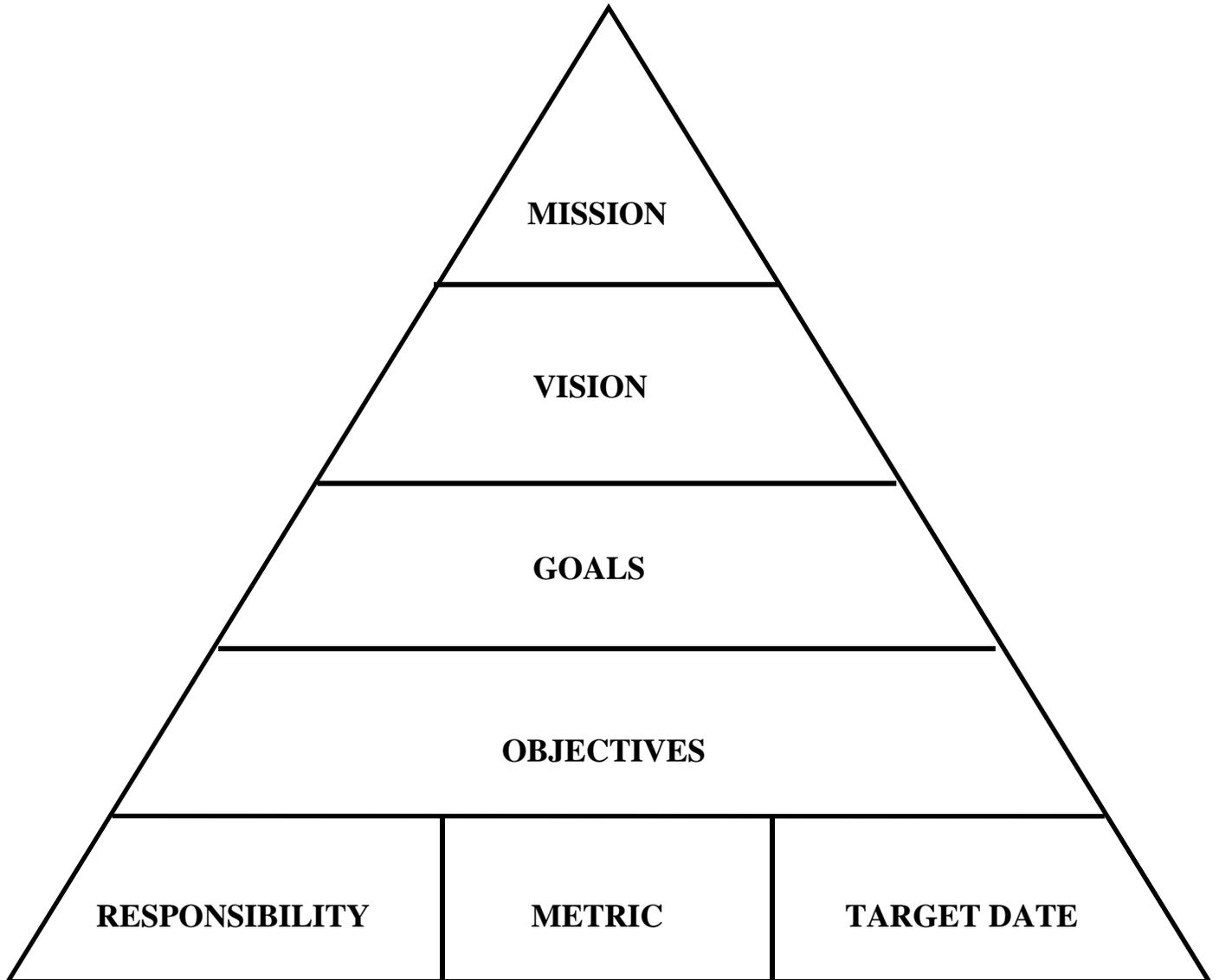
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DCAA PLAN STRUCTURE



DEFINITIONS

GOAL:

A broad, long-range statement of what is to be accomplished; usually expressed in positive terms, and supportive of the Vision Statement.

OBJECTIVE:

A specific measurable, attainable and time-bound initiative describing activities, projects or tasks that lead to the successful completion of Goals.

METRIC:

A measurement that is used to determine whether the objective is met and is expressed in neutral terms.

DCAA STRATEGIC PLAN ABBREVIATIONS



AD HOC	-	Ad Hoc Committee
APPS	-	Audit Planning and Performance System
APWG	-	Automated Processes Working Group
C	-	Resources
CAC	-	Common Access Card / Contract Audit Coordinator, as appropriate
CE	-	Central Region
CM	-	Resources, Administrative Management Division
CMO	-	Contract Management Office
CMTL	-	Computer Managed Training Library
CPE	-	Continuing Professional Equivalent
DCAI	-	Defense Contract Audit Institute
DCMA	-	Defense Contract Management Agency
DD	-	Deputy Director
DFAS	-	Defense Finance and Accounting Service
DL	-	General Counsel
DMIS	-	DCAA Management Information System
DP	-	Defective Pricing
DQ	-	Special Assistant for Quality Management
DRID	-	Defense Reform Initiative Directive
DSC	-	DMIS Standing Committee
EA	-	Eastern Region
ESC	-	Executive Steering Committee
FAO	-	Field Audit Office
FD	-	Field Detachment
FDQ	-	Special Assistant to the Director, Field Detachment
HPSE	-	Heads of Principle Staff Elements
HQ	-	Headquarters
IDP	-	Individual Development Program
MA	-	Mid-Atlantic Region
NE	-	Northeastern Region
O	-	Operations
OA	-	Operations Audit

OAL	-	Operations, Audit Liaison Division
OIT	-	Operations, Information Technology Division
OITN	-	Operations, Network Operations Branch
OTS	-	Operations, Technical Audits Services Division
OWD	-	Operations, Workload Analysis Division
P	-	Policy and Plans
PPD	-	Policy and Plans, Program Division
PQA	-	Policy & Plans, Quality Assurance Division
PSAD	-	Planning and Staff Allocation Document
PWT	-	Participative Work Team
QA	-	Quality Assurance
RD	-	Regional Director
RQ	-	Special Assistant to the Regional Director
RQA	-	Regional Quality Assurance Manager
SA	-	Supervisory Auditor
TAC	-	Training Advisory Committee
TS	-	Technical Specialist
WE	-	Western Region
WP	-	Work Paper
ZBB	-	Zero Based Budgeting



COMMITMENT TO EXCELLENCE

In support of the National Interest, we are dedicated to providing timely and responsive audits, reports, and financial advisory services to Department of Defense contracting officers and other customers.

Our aim is to be **THE** audit organization with the foremost reputation for competence, integrity, and customer satisfaction by:

- Creating an environment of teamwork, open communication, trust, and mutual respect, and
- Developing highly qualified employees dedicated to the concept of continuous improvement.

William H. Reed
Director

D C A A G O A L S

GOAL 1: Quality of Work Life Environment

Foster a quality work-life environment that promotes trust, teamwork, mutual respect, superior job performance and high morale.

GOAL 2: Customer Satisfaction

Assure customer satisfaction by providing timely and responsive audits and financial services that meet or exceed customer requirements and expectations.

GOAL 3: Professional Competence

Attain the highest level of professional competence through continuous improvement in the management and performance of audits and services.

GOAL 4: Best Value Audit Services

Provide best value audit and financial services through continuous evaluation and improvement of audit and administrative processes.

GOAL 5: Integrated IT Structure

Provide an integrated Information Technology (IT) structure that promotes effectiveness and efficiency in providing services for internal and external customers.

GOAL 1 – Quality of Work Life Environment

Objective: G1-02-02

Responsible Element: Resources

By FY 2004 (June), provide every employee with Common Access Cards (CACs) to eliminate the administrative burden associated with PKI Certificates.

Metric:

Every employee has been issued a CAC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Acquire CACs for all HQ employees.	CM	Jun 02
2. Test, identify and resolve issues, document lessons learned, and prepare user instructions in such areas as: use of CACs for network login; activation of PKI certificates on cards; use of PKI certificates for signing and encrypting e-mail messages; user awareness of what messages will and will not be readable after activating new certificate; ways to prevent loss of encrypted messages, if any; etc.	O	Jul - Sep 02
3. Prepare initial CAC policy for purposes of pilot. Modifications to policy will be necessary as experience is gained and lessons are learned.	CM / O	Jul 02
4. Pilot use of CACs at HQ.	CM / OITN	Jul – Sep 02
5. Address regional questions and concerns to facilitate negotiations with the unions.	CM / OITN	Jul – Sep 02
6. Issue initial CAC policy to the regions, and request name of regional CAC coordinator and implementation plans.	CM	Oct 02
7. Issue instructions to the regions on such issues as: how to install readers and software, how to use CACs for network login, how to activate PKI certificates, and how to sign and encrypt e-mail messages.	OITN	Oct 02
8. Regional CAC coordinators will lead regional and FAO efforts to acquire CACs and implement. RDs will provide to HQ CM the name of the regional coordinator	RDs	Nov 02

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
and the implementation plans for the regions and FAOs.		
9. Regions will acquire CACs for all regional and FAO personnel and will carry out implementation plans. The regional goal should be to complete the HQ office implementation by Mar 03, with the FAOs implemented by Jun 04.	Regions	Nov 02 – Sep 04
10. Finalize CAC policy and issue Agency-wide. Mandate use of cards Agency-wide for network logon once all employees have cards.	CM / O	Oct 04

GOAL 1 – Quality of Work Life Environment

Objective: G1–03–01

Responsible Element: O / P / C

By September 30, 2008, complete competitive sourcing studies on 50 percent or 258 full time equivalent (FTE) positions identified as commercial type activities in DCAA's FY 2000 Federal Activities Inventory Reform (FAIR) Act Inventory.

Metric:

Completion of competitive sourcing studies on 50 percent / 258 FTEs.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Identify from the FY 2000 FAIR Inventory the universe of potential positions for competitive sourcing studies.	P / C	Sept 03 - 07
2. Determine appropriate competitive sourcing strategy (A-76, ESOP, Transitional Benefit Corporations, Negotiate with Private Sector, City-Base Partnership, Strategic Partnering, and Quasi-Government Corporations) to be used.	CM	Oct 03 - 07
3. Summarize results of research and obtain DCAA ESC approval on (1) the recommended positions to be studied, (2) the competitive sourcing strategy to be employed, and (3) the milestone plan for completion of the studies.	C	Dec 03 - 07
4. Incorporate the approved milestone plan (from Milestone 3) into this objective and proceed with studies.	C	Jan 04 - 08
5. Obtain final verification of designated positions.	C / Regions	Jun 04 - 08
6. Release of Public Announcement that a Study is being conducted (locally, Union and in FedBizOpps.gov). This action starts the clock.	C	Jul 04 - 08
7. Develop and certify Government Cost Estimate in accordance with Attachment C, OMB Circular A-76, using COMPARE software.	CF	Aug 04 - 08
8. Develop and certify Private Sector Cost Estimate in accordance with Attachment B, OMB Circular A-76,	CM	Aug 04 - 08

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
using COMPARE software.		
9. Calculate and certify adjusted Cost Estimate to determine/certify the cost effective source in accordance with Attachment C, OMB Circular A-76, using COMPARE software.	C	Sep 04 - 08
10. Review SLCF (Streamlined Competition Form) – Cost comparison phase.	P / O	Sep 04 - 08
11. End Date – Performance Decision Date.	C	Sep 04 - 08
12. Release Announcement of Decision locally and in FedBizOpps.gov.	Contracting	Sep 04 - 08
<p>13. Implementation Phase:</p> <p>Agency Performance Decision – CO executes letter of obligation with an official responsible for performing the commercial activity.</p> <p>Private Sector Decision – CO may issue a solicitation to determine a private sector service provider and award a contract in accordance with the FAR.</p> <p>Negotiate with Union (if contracted out).</p>	<p>CO</p> <p>CO</p> <p>CPP / Regions</p>	<p>Oct 04 – 08</p> <p>Oct 04 - 08</p> <p>Oct 04 - 08</p>

GOAL 1 – Quality of Work Life Environment

Objective: G1-04-01

Responsible Element: DQ/RQ Team

By December 2005, identify and implement better techniques for understanding Quality of Worklife (QWL) expectations and tools for measuring progress.

Metric:

Completion of QWL progress measurement and report to the ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Hold initial planning meeting to develop basic guidelines and structure for focus groups (4-5 PWTs) to ensure ESC expectations are met.	DQ/RD-1/RQ Team	Aug 04
2. Select one highly performing PWT to address the stated objective.	RDs	Sep 04
3. Research and/or brainstorm ideas for identification of alternative techniques for understanding Quality of Worklife expectations and tools for measuring progress. PWTs will select a "PWT Representative" for subsequent milestones.	Selected PWTs	Nov 04
4. Share results of research and brainstorming sessions, define and develop a recommended approach to reaffirm/publicize management QWL objectives and tool(s) for measuring progress in terms of employee feedback. (Method, timing and frequency).	PWT Reps., OAI, and DQ/RD-1/RQ Team	Jan 05
5. Present to the ESC for discussion and vote.	Rep(s) from Perf. Element 4	Feb 05
6. Implement tools and methods as voted by the ESC.	DQ and OAI	Jun 05
7. Perform follow-up and prepare summary report.	OAI and DQ/RD-1/RQ Team	Oct 05
8. Present initial summary report of 2005 process to ESC.	DQ	Dec 05

GOAL 1 – Quality of Work Life Environment

Objective: G1–04–02

Responsible Element: DD

By FY 2005, define methods and processes for keeping employees better informed of operational issues on a near-term basis with particular emphasis on matters that affect employees' careers, benefits, and/or other quality of work life concerns.

Metric:

Brief ESC on recommendations.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Form an Ad Hoc Committee, led by the FD Director, comprised of a cross-section of managers from HQ, Regions and FAOs.	DD	Jul 04
2. Hold initial meeting to discuss and explore: <ul style="list-style-type: none"> a. Existing sources of communication b. Employees knowledge of existing sources of communication and identify potential barriers to this information c. The kinds of communication employees want that they are not getting d. The need to gather additional information from employees and the appropriate methods (i.e., survey). 	Ad Hoc	Aug 04
3. Collect and organize all necessary data.	Ad Hoc	Oct 04
4. Analyze data, address barriers, and identify existing or new ways to keep employees informed on a near-time basis (e.g. frequent manager staff conferences, newsletters, management techniques).	Ad Hoc	Feb 05
5. Define effective methods and processes for keeping employees better informed of operational issues.	Ad Hoc	Apr 05
6. Forward initial findings/recommendations to DD.	Ad Hoc	Jun 05
7. Present report and recommendations to the ESC.	DD/Ad Hoc	Sep 05

GOAL 1 – Quality of Work Life Environment

Objective: G1-04-03

Responsible Element: FD

By FY 2005, explore opportunities to improve morale, including nontraditional methods of recognition.

Metric:

Completion of study and presentation of recommendations to ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish an Ad Hoc Committee, led by the FD Director, comprised of a cross-section of employees from the HQs, Regions, and FAOs.	Ad Hoc	Jun 04
2. Analyze the results of existing information such as the 2003 Climate Survey, Central Region Supplemental Survey, etc. and identify opportunities to improve morale.	Ad Hoc	Oct 04
3. Based on analysis of existing information, survey selected FAOs and regional offices on traditional and non-traditional methods already in place to improve morale and those methods that the FAOs/regions believe could be implemented to improve morale. The survey should focus on those areas that prior surveys indicated needed improvement.	Ad Hoc	Nov 04
4. Analyze survey results and develop recommended initiatives. Evaluate costs/practicality/potential benefits of initiatives including identification of barriers to implementation. Develop recommendations for the ESC including suggestions for overcoming the barriers. Recommendations should include methods to disseminate the information to the field (e.g. managers toolbox) and methods to reinforce the recommendations.	Ad Hoc	Aug 05
5. Present recommendations to the ESC.	Ad Hoc	Sep 05

GOAL 1 – Quality of Work Life Environment

Objective: G1–04–04

Responsible Element: O and Eastern

By FY 2005, develop an improved process for encouraging and identifying innovative ideas from the workforce.

Metric:

Implementation of an ESC approved process to define, identify and publicize individual and collective innovations accomplished within DCAA.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Research and refine definitions of individual, team and organizational innovation using internal and external conceptual descriptions and real-life examples. Identify one or more alternative methods for publication to DCAA employees.	O and EA	Aug 04
2. Present #1 to the ESC for discussion and vote.	O	Sep 04
3. Establish Ad Hoc consisting of Operations, Policy, Regional and FAO representatives.	O	Oct 04
4. Assess current procedures and processes (at all levels) to encourage, recognize and communicate innovation ideas to the workforce.	Ad Hoc	Dec 04
5. Interface with other Government Agencies to identify "external" processes related to organizational innovation.	Ad Hoc	Dec 04
6. Determine if additional procedures and processes are needed to recognize and communicate innovative ideas.	Ad Hoc	Feb 05
7. Present recommendations to ESC for approval.	Ad Hoc	Mar 05
8. Communicate approved recommendations to the workforce and encourage the submission of innovative ideas.	O	Sep 05

GOAL 2 – Customer Satisfaction

Objective: G2-01-03

Responsible Element: Policy

By FY 2002, 2003 and 2004, complete the incurred cost audits identified by DCMA as necessary to accomplish DCMA Performance Goal 1.7.3 of reducing the quantity of overage contracts.

Metric:

Percentage of audits completed in FY 2002, 2003 and 2004 (from the universe of DCAA/DCMA jointly identified incurred cost audits).

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Develop and distribute joint DCMA / DCAA database to FAOs. Guidance will include guidelines for prioritization & will be coordinated with DCMA HQ and include the following statement "This memorandum has been coordinated with DCMA Headquarters."	P	May 01 and Quarterly
2. O to modify DMIS to allow identification of incurred cost assignments necessary for accomplishment of the objective.	O	May 01
3. FAOs meet with DCMA ACOs to jointly identify the incurred cost audits necessary to accomplish DCMA Performance Goal 1.7.3 using the joint DCMA / DCAA database.	FAOs	Jul 01
4. FAOs to code DMIS for assignments to accomplish objectives.	FAOs	Jul 01
5. FAOs assess whether they have the resources to meet DCMA needs within the existing program plan. FAOs report resource shortfalls, if any, to the region.	FAOs	Aug 01
6. Regions access FAO shortfalls and reallocate resources between FAOs, if feasible, to accomplish the objective. Regions report resource shortfalls, if any, to HQ, Operations.	RDs	Aug 01
7. HQ assesses resource shortfalls and determines if shortfalls can be met by reallocating resources between regions. HQs reports results to the regions.	D / O	Aug 01

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
8. O extracts information for P from DMIS to provide periodic updates of FAO audits to DCMA HQ and DRID #53 ESC members.	O / P	As requested
9. FAOs and DCMA CMOs meet periodically to update list of incurred cost audits to accomplish objective. Additional audits identified will be coded in DMIS.	FAOs	As needed
10. RDs assess accomplishment of the objective and plans to meet future objectives. Report to ESC.	RDs	Dec 01 - 04

GOAL 2 – Customer Satisfaction

Objective: G2–02–01

Responsible Element: Policy

By FY 2003 and 2004, reduce the number of overdue Indirect Cost Rate Proposal submissions by 35 percent and 35 percent (cumulative 79 percent) respectively of the FY 2002 baseline.

Metric:

Percentage reduction of overdue indirect cost rate proposal submissions. (Note: A proposal will no longer be considered “overdue” when the FAO recommends that the contracting officer exercise its authority to render a unilateral determination and provides recommended rates/costs.)

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Issue MRD on guidance for developing unilateral total contract cost recommendations for the contracting officer to reflect the revisions to FAR 42.705 and FAR 52.216-7 under FAC 2001-04, effective February 20, 2002.	P	Jun 02
2. Assess accomplishment of the objective and plans to meet future objectives. Report results at ESC meeting.	RDs	Dec 03
3. Assess accomplishment of the objective and plans to meet future objectives. Report results at ESC meeting.	RDs	Dec 04

GOAL 2 – Customer Satisfaction

Objective: G2-02-02

Responsible Element: Policy

By FY 2003*, increase by 10 percentage points the percentage of incurred cost audit reports issued with a Cumulative Allowable Cost Worksheet (CACWS) over the FY 2002 baseline.

Metric:

Percentage of non-corporate/group incurred cost audit reports issued with a cumulative allowable cost worksheet. For contracting officer determined rates and assist audits on direct costs, the objective is considered achieved when the incurred cost audit report states that within 60 days after the final rates for the period are determined that (1) the contractor commits to provide the CACWS or (2) the FAO commits to prepare the CACWS using contractor billing system data and the final rates.

*** ESC voted in December 2003 to extend the objective to FY 2004.**

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Policy will review the RD's assessment of the accomplishment of the FY 2002 Objective for lessons learned and develop revised audit policy, if applicable.	P	Feb 03
2. RDs will assess accomplishment of the objective and plans to meet future objectives. Report results at ESC meeting.	RDs	Dec 03
3. RDs will assess accomplishment of the objective and plans to meet future objectives. Report results at ESC meeting.	RDs	Dec 04

GOAL 2 – Customer Satisfaction

Objective: G2-02-04

Responsible Element: Policy

By FY 2003, assess the current system for providing audit guidance and make process improvements to include implementation of a system that tracks internal coordination of formal technical guidance issues, at the FAO, Regional and Headquarters level. The system will include an appropriate cycle time goal for each major step of the process.

Metric:

Implementation of process improvements and a tracking system with appropriate goals.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish an ad hoc committee to address the stated objective. The ad hoc committee will include an RST, FAO Manager, and a PAC program manager. Each region will have points of contact to coordinate with the ad hoc.	HQ / Regions	Aug 02
2. Review and document the current process (the DCAAM Chapter 4-900 as well as regional instructions) for requesting and providing audit guidance through all levels of the process, including systems currently in use to track elapsed days.	Ad Hoc	Nov 02
3. Develop a best practice for requesting and responding to requests for audit guidance.	Ad Hoc	Sep 03
4. Develop the criteria for establishing appropriate cycle time goals for major steps in the guidance request process.	Ad Hoc	Sep 03
5. Develop a plan to implement the process improvement including cycle time goals for the second half of FY 2004 based on the criteria developed in MS 4.	Ad Hoc	Sep 03
6. Obtain ESC members' input on recommendations.	Ad Hoc	Oct 03
7. Develop a standard mechanism for tracking request for guidance, e.g., database, excel, DMIS.	Ad Hoc	Dec 03
8. Finalize implementation plan.	Ad Hoc	Jan 04

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
9. Obtain ESC members' final approval.	Ad Hoc	Feb 04
10. Implement the process improvements and Agency guidance tracking system.	FAOs / FD / HQ / Regions	Mar 04

GOAL 2 – Customer Satisfaction

Objective: G2-02-05

Responsible Element: Operations/Policy

By FY 2004, throughout DoD's e-invoicing initiatives, DCAA will be an active participant in the development and application of all e-invoicing products (such as Wide Area Work Flow - WAWF) used for electronically approving public vouchers, with a goal of electronically approving 98 percent of public vouchers submitted electronically.

Metric:

Percentage of electronically submitted public vouchers approved electronically.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish program management responsibilities at HQ.	PPD / OTS	Jun 02
2. Assigned PMs will attend scheduled workshops and meetings to represent DCAA interests in the voucher processing requirements. (As req'd) To include attending WAWF working group during the Test Writing Workshop.	PPD / OTS	As Req'd
3. Coordinate on the drafting of appropriate contract language to require contractors to use electronic invoicing.	PPD	Oct 02
4. Participate as required in the WAWF Operational Assessment Test (OAT) planned for September 9 – 27, 2002. Evaluate system functionality and operation as required for DCAA access to vouchers. Document the test results and identify modifications needed to ensure DCAA requirements are incorporated.	PPD / OTS	Oct 02
5. Provide interim status report to the ESC on the potential impact to DCAA.	O	Dec 02
6. Implement initial pilot site for WAWF. Evaluate system and evaluate impact upon business process. Develop implementation guidance and evaluate potential changes to policy guidance.	PPD / OTS	Aug 03
7. Expand pilot process to additional sites and evaluate implementation and policy guidance. (Date is	PPD / OTS	Jan 04

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
contingent upon limitations in WAWF and entitlement systems. Coordination is required with DFAS, DCMA, and other Service/Agency partners.)		
8. Define DCAA user registration process and training requirements for WAWF or other e-invoicing products. (Date is contingent upon DoD implementing production versions of e-invoicing systems.)	PPD / OTS	Jan 04
9. Provide WAWF training to authorized staff for voucher processing using the online WAWF or other e-invoicing products training site provided by DCAA.	PPD / OTS / Regions / FAOs	Feb 04
10. Supervisor and other authorized auditors will electronically process vouchers where appropriate.	Regions / FAO	Oct 04

GOAL 2 – Customer Satisfaction

Objective: G2-04-01

Responsible Element: Policy

For contractor locations belonging to the CAC Networks, by FY 2005 and 2006, increase by 20 percentage points annually the percentage of Incurred Cost Audit Reports issued with a Cumulative Allowable Cost Worksheet (CACWS) over the FY 2003 baseline.

Metric:

For contractors belonging to a CAC network, percentage of non-corporate/group incurred cost audit reports issued with a CACWS. For Contracting Officer determined rates and assist audits on direct costs, the objective is considered achieved when the incurred cost audit report states that within 60 days after the final rates for the period are determined that (1) the contractor commits to provide the CACWS or (2) the FAO commits to prepare the CACWS using the contractor's billing system data and the final rates.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Identify existing CAC networks and ensure members of each CAC network have the correct CAC Code in the Contractor Table in DMIS.	P / Regions	Apr 04
2. Coordinate with OWD to correct the DMIS manual to identify appropriate CAC Codes and develop a report to track the accomplishment of this objective.	P / O	May 04
3. Identify contractor locations within each CAC network that are not providing, or have not agreed to provide, a CACWS.	CAC / Regions	Jul 04
4. In conjunction with the contractor and the ACO, identify the obstacles to preparing and using CACWS at those locations.	CAC / Regions	Oct 04
5. Meet with corporate and local level contractor executives to develop solutions to overcome the obstacles identified at those locations and establish mutually agreeable timeframes for providing CACWS.	CAC / Regions	Dec 04
6. Assess accomplishment of the objective and plans to meet future objectives. Report results at ESC meeting.	RDs	Dec 05

GOAL 2 – Customer Satisfaction

Objective: G2-04-02

Responsible Element: Operations

Through FY 2006, increase the number of contractor submissions received in electronic form for annual incurred costs, claims and forward pricing to 75 percent, 85 percent and 90 percent for FY 2004, 2005 and 2006, respectively.

Metric:

Percentage of electronic submissions as reported in DMIS for activity codes: 10100, 10110, 15500, 17100, 17200, 21000, 22000, 23XXX, 27000, 28000, and 28500.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Operations will modify DMIS and related Cognos reports to reflect new activity codes.	OWD / OIT	Aug 04
2. Assess results of annual progress – identify barriers and best practices and determine actions required to meet objectives. Report to ESC.	Regions	Dec 04
3. Modify Agency guidance and training, as appropriate.	OTS / OAI	Mar 05
4. Assess results of annual progress – identify barriers and best practices and determine actions required to meet objectives. Assess how effectively FAOs are using electronic files. Report to ESC.	Regions	Dec 05
5. Modify Agency guidance and training, as appropriate.	OTS / OAI	Mar 06
6. Assess results of annual progress and report to ESC on how effectively FAOs are using electronic files.	Regions	Sep 06

GOAL 3 – Professional Competence

Objective: G3–02–04

Responsible Element: Policy

By CY 2003*, Regions/FD will achieve or maintain audit report quality at the 95 percent “Zero Error” audit reports level.

Metric:

Percentage of error-free reports.

** The ESC voted in March 2004 to extend this objective to CY 2005.*

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Charter a broad based RQA study (supported by POA) of the level of error-free reports to include field visits to document FAO audit report quality processes and FAO manager insights into factors that both positively and adversely affect the issuance of error-free reports.	RQA Ad Hoc	Jul 02
2. RQA Team Leader reports results to ESC on assessment of current error-free level and best practices for maximizing error-free report percent.	RQA Ad Hoc	Dec 02
3. Regions / FD implement action plans.	Regions / FD	Jan 03
4. P to report results of DCAA's CY 2003 audit report quality control checklist compilation to the ESC.	P	Mar 04
5. P to report results of DCAA's CY 2004 audit report quality control checklist compilation to the ESC.	P	Mar 05
6. P to report results of DCAA's CY 2005 audit report quality control checklist compilation to the ESC.	P	Mar 06

GOAL 3 – Professional Competence

Objective: G3–03–01

Responsible Element: Policy

By FY 2005 (March), implement policy changes, assess field implementation and identify additional opportunities to better meet customer needs for reviewing contracts with Earned Value Management System (EVMS) and other DoD Program Management System Reporting Requirements.

Metric:

Completion of study analysis and development of recommendations for improvement.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Brief the ESC on proposed approach to EVMS surveillance and CPR/CSSR/CFSR surveillance.	P	Jun 03
2. Evaluate necessary changes to DMIS activity codes and related definitions based on regional recommendations and changes to audit policy.	P / O	Jun 03
3. Provide planning guidance on EVMS and Other DoD Program Management System Reporting Requirements (CPR/CSSR/CFSR/CCDR) in the FY 2004 PSAD.	P	Jun 03
4. Develop training on policy changes and performance of audits relative to EVMS and Other DoD Program Management System Reporting requirements.	P / Regions	Aug – Oct 03
5. Issue an MRD outlining revised audit policy relative to CCDRs and transmitting new SAP/APPS package for CCDR audits.	P	Aug 03
6. Issue an MRD outlining revised audit policy and transmitting revised SAP / APPS packages for EVMS surveillance audits and audits of CPR/CSSR/CFSR.	P	Sep 03
7. Make necessary APPS changes to implement revised audit policy and incorporate new and revised audit programs identified above.	P	Oct 03
8. Conduct training (developed under milestone 4) on policy changes and performance of audits relative to EVMS and Other DoD Program Management System Reporting	Regions	Nov 03 – Jan 04

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
Requirements to FAO auditors as necessary.		
9. Make necessary CAM changes to implement changes in audit policy.	P	Jan 04
10. Assess Regional/FAO implementation of revised audit policy.	P / Regions	Oct – Dec 04
11. Identify best practices and opportunities for process improvements and develop techniques and tools to achieve desired results.	P / Regions	Feb 05
12. Formulate final recommendations including an identification and explanation of expected improvements to be realized. Indicate changes required in Agency policy and guidance to implement recommended items.	P	Feb 05
13. Present final recommendations to the ESC.	P	Mar 05

GOAL 3 – Professional Competence

Objective: G3–03–02

Responsible Element: Operations

By FY 2004, improve productivity and audit quality by identifying capabilities in our current software tools that are not used or underutilized and determine appropriate sources of training to develop those skills.

Metric:

Brief ESC on review results and recommended training.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. OTS will develop a field visit plan to assess software tool usage.	OTS	Feb 04
2. OTS and Regions will conduct initial field visits to assess usage in each region. Regions will conduct additional assessments at 2-3 other FAOs.	OTS / Regions	Mar – Jun 04
3. The Training Advisory Committee (TAC) will establish an Ad Hoc of field, OTS and DCAI representatives to review results of field assessments to identify gaps in training and recommend source of training to develop skills.	Ad Hoc	Apr 04
4. Identify software capabilities that are not used or are underutilized which would contribute to improved productivity and audit quality. OTS will consolidate OTS/Regional findings and report to the Ad Hoc.	OTS / Regions	Jul 04
5. Ad Hoc will prepare a comprehensive report identifying sources of training to develop needed skills, target audience, etc.	Ad Hoc	Nov 04
6. OTS/TAC will brief ESC on review results of field visits and training recommendations.	OTS / TAC	Dec 04

GOAL 3 – Professional Competence

Objective: G3–03–03 Responsible Element: Mid-Atlantic Region/Policy

By FY 2004, study the Financial Capability Risk Assessment and audit processes to ensure risk assessments and audits are performed in the most effective and efficient manner and make recommendations for improvement to the ESC.

Metric:

Completion of study analysis and development of recommendations for improvement.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Select a sample of completed financial capability risk assessments and audits. For each assignment, (i) identify steps that were useful and not useful in developing a conclusion (e.g. Compustat, Z-Score), (ii) determine if audit hours incurred were commensurate with government exposure, (iii) identify prior training and experience of the lead auditor and / or use of Technical Specialist, and (iv) contact recipients of the work product and compile any issues or concerns. Stratify results by contractor characteristics.	Ad Hoc	Feb 04
2. Evaluate the risks and / or benefits of utilizing publicly available data for risk assessment and audit procedures (e.g. credit reports or investor analysis). Consider the advantages / disadvantages of incorporating finance concepts into guidance (e.g. Free Cash Flow and Economic Value Added (EVA)).	Ad Hoc	Mar 04
3. Determine if there are opportunities to incorporate the results of financial capability risk assessments and audits into other applicable audits (e.g. progress payments).	Ad Hoc	Apr 04
4. Based on the results of Milestones 1 - 3 above, identify opportunities to focus, refine and streamline the guidance / process and related training.	Ad Hoc	May 04
5. Report results of analysis and recommendations to the ESC.	Ad Hoc	Jun 04
6. Incorporate approved recommendations into guidance.	P / Ad Hoc	Sep 04

GOAL 3 – Professional Competence

Objective: G3–03–04

Responsible Element: Operations

By FY 2006, increase by 10 percent the percentage of CPAs and staff with Advanced Degrees held by auditors over FY 2003 levels.

Metric:

Percentage of auditors holding CPA Certificate and percentage of auditors holding advance degrees.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. All regions will develop and implement a plan to encourage employees to sit for the CPA exam and/or obtain an advance degree.	Regions/HPSEs	Mar 04
2. Prepare action plans for employees who have passed the CPA exam but have not received a CPA certificate.	Regions/HPSEs	Sep 04-06
3. At least one time during the year, supervisors will assure that career development discussions are held with their staff. These sessions will point out the benefits in furthering their education and encourage eligible personnel to pursue CPA certification and/or advance degrees.	All Supervisors	Sep 04-06
4. Annual assessments of Agency progress will be made along with status reports to the ESC.	O	Sep 04-06
5. Annual verification of employee's information contained in database will be made.	Regions/HQ	Oct 04-06
6. Final results regarding accomplishment of the 10 percent increase will be made along with a presentation to the ESC.	O	Dec 06

GOAL 3 – Professional Competence

Objective: G3–04–01

Responsible Element: Policy

By FY 2006, improve policy and processes (as appropriate) for performing audits at multi-segment contractor locations and, implement the responsibility planning matrix created by the CAC Ad Hoc at these locations.

Metric:

Issuance of identified audit planning and guidance changes.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Identify all multi-segmented major contractors [both CAC and not part of a CAC network].	Policy	May 04
2. Identify Policy program manager, 2 representatives from CAC offices, and 2 representatives from multi-segmented major contractors not part of a CAC network to serve on ad hoc team chartered to propose policy changes to accomplish stated objective.	Policy / Regions	Jun 04
3. Identify best practices for planning and coordinating common contractor systems audit results within multi-segment (non-CAC or CHOA) cross Region contractors. Modify responsibility matrix accordingly.	Ad Hoc w/ Policy	Jul 04
4. Develop project program addressing policy areas to be explored and questions to be answered.	Ad Hoc	Jul 04
5. Obtain and analyze relevant data from pertinent sources (e.g., QA reviews, DMIS, CACs, etc.)	Ad Hoc	Oct 04
6. Develop draft policy changes and new audit planning and programming tools, and coordinate as appropriate with CACs.	Ad Hoc	Jan 05
7. Present Ad Hoc's proposed policy changes/new tools to ESC for approval, direction, and determination as to whether separate training is warranted.	Policy	Mar 05
8. Incorporate relevant planning changes into FY 2006 PSAD and issue necessary guidance.	Policy	Jun 05

GOAL 3 – Professional Competence

Objective: G3–04–02

Responsible Element: Operations

By FY 2006, study alternative processes for delivery of training that maintains high quality while reducing Agency costs and increasing training opportunities.

Metric:

Complete study and provide recommendations to ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Identify an Ad Hoc Team from DCAI, OIT and the TAC.	O	Jul 04
2. Define Agency processes for training delivery as a baseline for improvement. Identify resource and equipment constraints related to online distance learning with consideration for personnel, bandwidth, equipment and other resource limitations.	Ad Hoc	Aug 04
3. Define and evaluate instructional models that effectively enhance self-paced, online distance learning and classroom activities for maximum learning with minimal delivery costs. Identify future opportunities / barriers involving course design, instructional and delivery methods.	DCAI / Ad Hoc	Oct 04
4. Provide status briefing to ESC on results of Ad Hoc activities under milestones 2 and 3 above.	DCAI / Ad Hoc	Dec 04
5. Develop and conduct pilot online course(s) to replace/supplement existing DCAI seminar. Evaluate course enhancements, cost efficiencies, student/supervisor reaction and identify opportunities and barriers.	DCAI / Ad Hoc	Mar 05
6. Obtain NASBA Registry for internet-based group delivery.	DCAI	Jul 05
7. Coordinate with TAC to identify other appropriate seminars for online delivery.	Ad Hoc / TAC	Aug 05
8. Brief ESC on results of pilot and TAC coordination and recommendations.	DCAI / Ad Hoc	Sep 05
9. Redesign instructional content for online delivery (FY 07) and develop recommendations related to future applications of distance learning techniques.	DCAI / Ad Hoc	Mar 06

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
10. Draft report and coordinate recommendations with TAC/O.	Ad Hoc / TAC	Apr 06
11. Present final report and recommendations to ESC.	O	Jun 06

GOAL 3 – Professional Competence

Objective: G3–04–03

Responsible Element: Operations

By March 2006, assess the Agency's process for performing Information Systems (IS) audits. Develop and implement improvements as appropriate.

Metric:

Completion of study and implementation of approved ESC recommendations.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Form an Ad Hoc Committee, including Policy and Regional representatives, chaired by OTS, to assess the Agency's processes for performing IS audits.	O	Aug 04
2. Research and analyze pertinent sources of information on processes for auditing IS systems.	Ad Hoc	Feb 05
3. Assess FAO auditing of IS systems through selected field visits.	O/Ad Hoc	Mar 05
4. Evaluate Agency processes using results of research and field visits and develop suggestions for improvement.	Ad Hoc	Aug 05
5. Present suggestions for improvement to the ESC.	Ad Hoc	Sep 05
6. Develop revised guidance, audit programs, and training in light of the ESC's recommendations.	O/Ad Hoc	Mar 06

GOAL 3 – Professional Competence

Objective: G3–04–04

Responsible Element: Operations

By FY 2006, increase training opportunities and methods for improving supervisor and auditor proficiency in use of APPS and related software tools.

Metric:

Deploy assessment tool, identify training gaps and include needed training in FY 2007 IDP.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish an Ad Hoc consisting of Operations, Policy, Regional and FAO representatives.	O	Jul 04
2. Define auditor and supervisor proficiency in the context of APPS, related software tools and computer assisted analytical tools.	Ad Hoc	Dec 04
3. Present auditor and supervisor proficiency measures to ESC for approval.	Ad Hoc	Dec 04
4. Develop a method for individual auditors and supervisors to assess their proficiency vis-à-vis ESC approved proficiency measures.	Ad Hoc	Jun 05
5. Identify training linked to specific types of proficiency gaps to assist auditors and supervisors in achieving desired levels of computer proficiency. Also consider results of Milestone 4 of SPO G3-03-02.	Ad Hoc	Jun 05
6. Present completed objective assessment tool and linked training package to the ESC for approval.	O	Jun 05
7. Pilot test assessment tool and develop recommended deployment and use to the ESC.	O	Sep 05
8. Update DCAI curriculum and Auditor Competency Database (Chapter 21) to incorporate ESC approved proficiency measures.	DCAI	Jun 06
9. Include identified training needs in FY 2007 IDPs.	Regions	Sep 06

GOAL 4 – Best Value Audit Services

Objective: G4–02–01

Responsible Element: Operations

Each year through FY 2008, DCAA will manage its Cost per Direct Audit Hour at a level sufficient to maintain our competitive advantage over the comparable National Public Firm composite rate.

Metric:

Actual Cost per Direct Hour.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Provide any initiatives planned for the upcoming fiscal year for OWD's consideration in determining preliminary objectives.	Regions	Jun 04 - 08
2. Regions provide initial Annual Financial Plan (AFP) for HQ review and consideration in developing CPDAH objective.	O / C	Jul 04 - 08
3. In coordination with Regions, develop CPDAH proposal for upcoming year. Present proposed rate to ESC.	O	Sep 04 - 08
4. Communicate objectives to Agency employees and incorporate into Annual Performance Metrics.	O	Oct 04 - 08
5. Compute actual cost per direct audit hour rates, and provide report to all employees on whether objectives have been met.	O / Regions	Quarterly
6. Annually, and in conjunction with benchmarking, compare the actual cost per direct audit hour to national firm rates.	O	Sep 04 - 08

GOAL 4 – Best Value Audit Services

Objective: G4-02-02

Responsible Element: Operations

Each year through FY 2005, increase productivity through specifically identifiable process improvements on Incurred Cost and Forward Pricing.

Metric:

Actual productivity rate for each selected area.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. OWD will solicit ESC for productivity initiatives for consideration in establishing preliminary productivity goals for the upcoming fiscal year. RDs will solicit FAOs for productivity initiatives.	O	May 04 - 05
2. ESC will provide initiatives planned for the upcoming fiscal year for OWD's consideration in determining preliminary objectives.	Regions	May 04 - 05
3. Provide preliminary objectives to ESC for approval.	O	Jun 04 - 05
4. Establish objectives to be incorporated into program plan.	ESC	Jun 04 - 05
5. Communicate objectives to Agency employees and incorporate into Program Plan guidance (PSAD).	O	Jul 04 - 05
6. Prepare program plan which will achieve the agreed-to productivity objectives.	Regions	Sep 04 - 05
7. Actual productivity available in DMIS at 2 week intervals.	O	Bi-weekly

GOAL 4 – Best Value Audit Services

Objective: G4–02–05

Responsible Element: Policy

By FY 2003, develop new tools for auditor use in assessing risk for specific audit areas and in performing audits.

Metric:

Implementation of revised risk assessment process and training.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. P present plan for revising the risk assessments in the WP B section of the APPS.	P	Mar 02
2. Revise the agreed-upon procedures (Code 28000) WP B risk assessment in APPS.	P	Apr 02
3. PPD form team of technical specialists and a PPD program manager to develop draft WP B risk assessments in APPS for defective pricing audits.	P	May 02
4. QA organization to develop training package on incurred cost risk assessments.	P	Jun 02
5. Revise the WP B risk assessments in APPS for forward pricing rates (Code 23000), financial capability (Code 17600), and incurred cost audits.	P	Jul 02
6. QA organization to conduct training or lead a "train-the-trainer" approach on incurred cost audit risk assessments.	P / Regions	Jul – Nov 02
7. Provide draft WP B risk assessments for defective pricing to the regions for review/comments.	P	Oct 02
8. PPD form team of TS and a PPD program manager to develop draft WP B risk assessments in APPS for equitable adjustment claims, terminations, and estimating systems.	P	Oct 02
9. Defective pricing team develops training package and provides to the regions (estimated 2 hours CPE).	P	Dec 02
10. Revised WP B risk assessment for defective pricing included in the APPS.	P	Jan 03
11. PPD to form team of TS and a PPD program manager to develop draft WPB risk assessments in APPS for estimating	P / Regions	Apr 03

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
systems.		
12. Regional ad hoc team member conducts training for DP Tech Specialists and selected auditors on revised defective pricing WP B risk assessments.	P / Regions	May 03
13. Provide draft WP B risk assessments for claims and terminations to the regions for review / comments.	P	May 03
14. Provide draft WP B risk assessments for estimating systems to the regions for review / comments.	P	Jun 03
15. PPD program managers to review the other internal control system audits to determine revisions necessary to the WP B risk assessment in APPS.	P	Aug 03
16. Revised WP B risk assessments for claims, terminations and estimating systems in the APPS.	P	Oct 03
17. Revised WP B risk assessment for other systems in APPS. The other systems audits to be revised are: <ul style="list-style-type: none"> • Billing • Labor • Compensation • MMAS • Purchasing • Indirect/ODC • Budget and Planning • Control Environment & Overall Accounting Controls • IT System General Controls (Operations). 	P / O	Jul 04

GOAL 4 – Best Value Audit Services

Objective: G4-02-07

Responsible Element: Operations

By FY 2003, research and identify training materials and methods to expand auditors' analytical and critical thinking capabilities.

Metric:

Development of materials, methods and implementation plan.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. The TAC will establish ad hoc of field and DCAI representatives to identify training materials to teach analytical and critical thinking skills.	TAC	Sep 02
2. Review DCAI courses to identify existing training materials that could be modified or adapted to teach analytical and critical thinking skills.	Ad Hoc	Dec 02
3. Research other sources of training that could be used to teach analytical and critical thinking skills. Report back to the TAC.	Ad hoc	Mar 03
4. Develop plan to incorporate analytical and critical thinking skills training into existing / new DCAI training courses.	TAC	May 03
5. Obtain ESC approval of proposed plan.	TAC	Jun 03

GOAL 4 – Best Value Audit Services

Objective: G4-02-08

Responsible Element: MA/Resources

By FY 2004, study and identify best practices for FAO administrative procedures across the Agency (filing, travel orders, DMIS, time keeping, voucher processing, contractor notification, etc.) to improve the efficiency of administrative support.

Metric:

Report to the ESC with the conclusions and recommendations on the assessment by May 30, 2004.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Utilizing the Admin Ad Hoc, identify administrative functions which can be standardized for improved efficiencies.	C / MA	Oct 02
2. Survey MA FAOs to determine what procedures are in place, if any, for the specific activities identified in the Guide.	MA	Nov 02
3. Compare and contrast responses from FAOs and determine if a best practice is evident.	MA	Dec 02
4. Share best practices with MA FAOs and establish a pilot test period for implementation of best practice.	MA	Jul 03
5. Survey MA FAOs for feedback on pilot results.	MA	Aug 03
6. Identify best practices produced by MA pilot.	MA	Sep 03
7. Validate pilot results with NE FAOs.	NE	Jun 04
8. Based upon MA and NE feedback, develop recommendations for ESC to consider implementing Agency wide.	MA	Aug 04
9. Brief ESC on results.	MA	Sep 04

GOAL 4 – Best Value Audit Services

Objective: G4-02-10

Responsible Element: Resources

By FY 2004, reduce Agency-wide indirect travel costs by 10 percent from the FY 2001 baseline through increased use of existing non-travel alternatives, such as teleconferencing, net meeting and video conferencing.

Metric:

A 10 percent reduction, adjusted for inflation, to total travel costs from the FY 2001 baseline.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Submit proposed indirect target travel activities and FY 01 costs.	HPSEs / RDs	Aug 02
2. Establish targeted indirect activities.	ESC	Sep 02
3. Calculate reductions by region and adjust Annual Financial Plans accordingly.	C	Oct 02
4. Publish guidelines on effective use of communication tools such as teleconferencing, net meeting and video conferencing to reduce targeted travel costs.	C / O	Nov 02
5. Track progress on meeting objective.	C / RDs	Sep 03 - 04

GOAL 4 – Best Value Audit Services

Objective: G4–03–01

Responsible Element: Operations

By FY 2006, identify non-inherently governmental audit work performed by DCAA and conduct a “Pilot” Program to assess whether such audit activity can be reasonably segregated and performed at less total cost with equal or better quality by outsourced personnel.

Metric:

Completion of Pilot Program and assessment report.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Assess major DCAA audit programs to identify any non-inherently governmental audit activity that would be subject to outsourcing pilot.	P	Jun 03
2. Research legal, security and policy issues associated with potential outsourcing of any identified effort.	O / P / C / DL	Jul 03
3. Develop statement of work and acquisition strategy for audit effort that could be outsourced.	C	Aug 03
4. Develop procedures and metrics for measuring pilot efforts.	O	Sep 03
5. Identify workload requirements in annual program plans for pilot effort.	O	Oct 03 - 05
6. Issue request for quotations.	C	Dec 03
7. Evaluate bids and award contract.	C	Mar 04
8. Brief affected customers / contractors.	O	Apr 04
9. Initiate pilot program.	Regions	Jun 04
10. Periodically evaluate progress and performance.	O	Jul 04 - 06
11. Summarize and prepare final pilot report.	O	Aug 06
12. Submit final report to ESC.	O	Sep 06

GOAL 4 – Best Value Audit Services

Objective: G4-04-01

Responsible Element: Operations & Resources

By FY 2005, study the current process for administering the Agency reimbursable program and identify ways to improve our ability to manage the impact of reimbursables on the Agency budget.

Metric:

Completion of study.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Each Region's focal point for reimbursables will solicit FAO Manager's concerns and identify best practices for the management of EACs and coordination of funding requirements with customers.	Regions	Sep 04
2. Regional focal points, along with C and O representatives, will form a forum to develop recommendations on ways to improve the Agency's reimbursable process at all levels (FAO, Region, HQ). Consider: <ul style="list-style-type: none"> • Consolidating regional requirements by reimbursable customer • Analyze practices used by other Federal Government Agencies 	Focal Point Forum	Dec 04
3. Present recommendations to the ESC.	C and O	Mar 05

GOAL 4 – Best Value Audit Services

Objective: G4-04-02

Responsible Element: Operations

By December 2004, identify actions required to further integrate leadership principles into the Agency culture.

Metric:

Report findings and recommendations to the ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Create a Management Ad Hoc to develop strategy to further integrate leadership principles into the culture.	Regions/FD/O/C	Jun 04
2. Assess what has been done in the areas of training, development, and reinforcement of leadership principles since the pilot leadership training was approved.	Ad Hoc	Jul 04
3. Assess the existing management performance elements for executives, managers and supervisors.	Ad Hoc	Sep 04
4. Design a self-assessment tool for management teams to help them determine if, where, and how the Agency's desired leadership principles are being applied. Consider alternative ways to reinforce leadership attributes through communication, leading by example and additional training.	Ad Hoc	Nov 04
5. Brief ESC on recommendations and proposed implementation approach.	Ad Hoc	Dec 04

GOAL 4 – Best Value Audit Services

Objective: G4–04–03

Responsible Element: O/P/C

By FY 2005, assess electronic records management policy requirements and workpaper filing practices to identify opportunities to reduce file sizes.

Metric:

Overall reduction of average files size in iRIMS.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish iRIMS average file size as of June 30, 2004 and provide Regions and FD the baseline. Provide details on high and low file sizes in iRIMS for baseline information by Region.	OIT	Jul 04
2. Provide examples of poor practices that need to be corrected and examples of methods of "right sizing" files.	Regions	Aug 04
3. Update applicable records management and working paper guidance and publish.	OTS/PAS/CM	Oct 04
4. Provide mid-year iRIMS statistical data on file size to regions.	OIT	Mar 05
5. Brief ESC on status of file size reduction initiative; identifying additional guidance needed.	Regions	Jun 05
6. Present final report and recommendations to ESC.	O	Sep 05

GOAL 5 – Integrated IT Structure

Objective: G5–01–02

Responsible Element: Operations/Resources

By FY 2002, deploy an integrated electronic archiving and storage system.

Metric:

Deployment of an integrated electronic archiving and storage system.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Ad hoc working group chartered.	Ad Hoc	Jan 99
2. Draft report staffed with champion.	Ad Hoc / CM	Apr 99
3. Deliverables submitted to the APWG: <ul style="list-style-type: none"> • Comparison of the reviewed software using the criteria in the DoD 5015.2-STD • Recommendation as to the software products to be tested in the Agency • Statement of work for the test • Initial list of criteria DCAA should use to evaluate the software products for ease of use 	Ad Hoc / CM	Jun 99
4. APWG presents recommendation to ESC for approval to establish pilot operation.	CM	Jul 99
5. Contract award for pilot test and evaluation.	CM	Sep 99
6. APWG presents results of test and recommendation(s) to ESC.	APWG	Mar 00
7. ESC approval of test site expansion, as appropriate.	CM	Mar 00
8. APWG presents results and recommendations to ESC.	APWG	Aug 01
9. Establish deployment schedule in conjunction with regions and HQ.	CM / Regions	Aug 01
10. Implementation at EA and WE Regions.	EA / WE	Feb 02
11. Problems identified at EA Region FAO Conference.	EA	Apr 02
12. Moratorium placed on system use, and additional memory added to existing iRIMS server.	CM / OITN	May 02
13. Testing of new iRIMS release, issue resolution, and	CM / OITN / Regions	Jul – Sep 02

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
documentation process.		
14. Obtain and setup new iRIMS server.	CM / OITN	Aug – Sep 02
15. Capacity test iRIMS.	OITN / Regions	Sep 02
16. Begin evaluation of iRIMS systems integrity.	POA / Regions	Oct 02
17. Acquire additional hardware to improve system response time.	OITN / CM	Feb 03
18. Set up and test hardware solution, to include capacity test of filing and retrieving simultaneously.	OITN	Mar 03
19. Restart deployment at one region to ensure hardware solution corrects response time issues.	CM / One Region	Apr 03
20. Reevaluate system readiness for agency-wide deployment.	OITN / CM	May 03
21. Obtain from Central, Mid-Atlantic, and Northeastern Regions their detailed implementation plans/schedules for deploying system to administrative staff at all FAOs with target completion of December 31, 2003.	CM / Regions	May – Jun 03
22. Electronic records management being used Agency-wide by administrative staff for filing.	CM / Regions	Jan 04
23. Obtain from all Regions their detailed implementation plans / schedules for deploying system to the remaining staff at FAOs and training on search / retrieval or records with target completion of June 30, 2004.	CM / Regions	Jan 04
24. Electronic records management being used by all Agency employees for search and retrieval of records.	CM / Regions	Jul 04
25. Complete evaluation of iRIMS system integrity.	P / Regions	Jul 04
26. Issue MRD instructing users that electronic filing is primary. Terminate filing paper documents, as appropriate.	CM	Jul 04

GOAL 5 – Integrated IT Structure

Objective: G5–01–03

Responsible Element: Operations

By FY 2003, achieve 95 percent accuracy for DMIS table data fields that are critical for internal and external reporting.

Metric:

Error rate in selected DMIS table data fields.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Identify DMIS data elements considered most critical for internal and external reporting in initial three DMIS tables to be evaluated: <ul style="list-style-type: none"> • Contractor table • Reimbursable table • Assignment table 	O / Regions	May 01
2. Estimate current error rates based on Impromptu queries and analysis. Provide status report to the ESC on the critical data elements and the estimated error rates.	O	Jun 01
3. In coordination with RQAs, develop guidelines and checklists to be used by FAOs for reference and self-assessments.	O / Regions	Sep 01
4. OWD/RQA teams review two branches & two residencies in each region to determine reasons for inaccuracies and make recommended improvements.	O / Regions	Oct 01 – Jan 02
5. OWD/RQA present the results of the reviews to the ESC.	O / Regions	Mar 02
6. Brief ESC on new/revised guidance, database element edit checks, and/or training plans where needed to improve data accuracy.	O / Regions	Jun 02
7. Conduct follow-up assessments as part of annual program plan.	RQAs	Oct 02 - Jun 03
8. Provide annual assessment and corrective action plans to ESC.	O / Regions	Sep 02 - 03

GOAL 5 – Integrated IT Structure

Objective: G5–01–04

Responsible Element: Operations

By FY 2004, DCAA will PKI enable all Intranet web-based applications.

Metric:

Conversion of identified systems.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Obtain Common Access Card (CACs) for HQ staff, develop guidelines for network logon, and conduct pilot test.	C / O	Aug 02
2. Headquarters finalizes guidance and regions begin obtaining CACs.	O / C / Regions	Nov 02
3. As CACs are obtained and readers installed, network login will be done via CAC / PIN (although not mandatory).	All	Nov 02 - Sep 03
4. APWG will identify other applications to be PK enabled and submit to ESC for approval.	APWG	Mar 03
5. Access to intranet will be controlled by use of CAC.	All	Jan – Sep 03
6. Network login and intranet access via CAC will be required.	All	Oct 03
7. Other identified applications will be PK enabled.	All	Oct 04

GOAL 5 – Integrated IT Structure

Objective: G5–02–01

Responsible Element: Eastern/Operations

By FY 2004, develop and implement modifications to APPS/Enhanced APPS that assist auditors and reduces the time required for peer and post review of audit reports and working papers.

Metric:

Modification of APPS. Brief the ESC on recommendations and estimated savings by December 2002. Implement new tools incrementally as developed by September 2004.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Determine requirements for automating audit working paper and audit report checklists and review sheets. Consider current Quality Checklist for Review of Audit Working Papers, Audit Report Quality Review Sheet and other functional Agency audit checks.	O / P	Sep 02
2. Evaluate checklist tool developed by EA.	EA / O	Oct 02
3. Develop plan for prioritizing and implementing audit checklist tools subject to automation. Document a process to identify and prioritize requested modifications to APPS.	O	Nov 02
4. Present development plan to ESC at December meeting.	O	Dec 02
5. Implement the development plan approved by the ESC.	O	Sep 04

GOAL 5 – Integrated IT Structure

Objective: G5–02–02

Responsible Element: O / P / C

By FY 2004, evaluate and recommend a standard electronic structure for permanent files that supports paperless initiatives and the telework program with the additional intent of reducing file space by at least 15 percent.

Metric:

Delivery of a briefing (report) to ESC by March 2004 including estimates of future file savings.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Form an Ad Hoc committee to develop a standardized electronic structure for permanent files.	CM / O / PAS	Mar 03
2. Ad hoc meets to (1) identify permanent file records to convert to an electronic format and (2) creating a file structure for storing and retrieving the electronic files prospectively, considering best practices from existing electronic file structures in field offices, regions and HQ. Based on the conversion analysis, ad hoc makes a go – no go decision.	Ad Hoc	May 03
3. Ad hoc explores the use of iRIMS and other potential methods, i.e. LAN based folders, to store permanent file data. Recommended method(s) must support the paperless initiative and remote access (Telework).	Ad Hoc	Aug 03
4. Ad hoc obtains CM/PAS approval of the standard structure.	Ad Hoc / CM / O / PAS	Nov 03
5. Field test the electronic structure at two FAOs within each region and one division in each region and HQ. If necessary, modify structure.	Ad Hoc	Apr 04
6. Develop baseline by region of FAO file space.	Ad Hoc	Apr 04
7. Ad hoc obtains final CM/PAS approval of the standard structure.	Ad hoc	May 04
8. Brief ESC on an electronic permanent file structure and estimated space savings through reduced paper files.	C / O / P	Jun 04

GOAL 5 – Integrated IT Structure

Objective: G5–02–04

Responsible Element: NE/Operations

By December 2003, exploit web-based tools to provide management and performance data at all organization levels. Web-based tools will provide lower infrastructure costs and greater efficiency beginning in FY 2004.

Metric:

Brief ESC on recommendations and estimated savings by calendar year. Implement web-based tools by December 2003.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Share current development with O and get feedback on effective design for Agency-wide use.	NE	Jul 02
2. Identify initial set of high-priority reports for web-enablement, based on FAO and DSC input.	DSC / O	Aug 02
3. Develop initial set of secure web-based reports including drill-throughs from summary to detail level.	NE / O	Oct 02
4. Evaluate impact on bandwidth and storage requirements for Intranet servers, identifying additional equipment needs if any.	O	Oct 02
5. Demonstrate tools at December ESC Meeting.	NE / O	Dec 02
6. Develop methods to minimize manual effort in extracting data files for the web-based tools.	NE / O	Jan 03
7. Field test web-based tools across regions.	NE / O	Apr 03
8. Accumulate recommendations and modify tools as appropriate. If more reports are requested, add this second set at this stage.	NE / O	Jun 03
9. Present final product to ESC and seek permission to implement Agency wide.	NE / O	Sep 03
10. Implement Agency-wide including guidance and instruction.	NE / O	Dec 03

GOAL 5 – Integrated IT Structure

Objective: G5–03–01

Responsible Element: Operations

By FY 2004, study and implement improvements to existing IT planning and management policy and procedures.

Metric:

Complete study and implement approved changes.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Review and evaluate existing IT planning and management policies and procedures.	O / FD / C	Sep 03
2. Flowchart critical processes and identify opportunities to improve the Agency's IT planning, evaluation, and deployment processes.	O / FD / C	Dec 03
3. Coordinate findings and recommendations with APWG.	O / FD / C	Jan 04
4. Present recommendations to ESC.	O	Mar 04
5. Implement approved recommendations.	O / FD / C	Sep 04

GOAL 5 – Integrated IT Structure

Objective: G5–03–02

Responsible Element: P/O/Regions

By December 2005, (1) Replace the “batch” paper-based guidance dissemination process with an electronic / web “flow” basis under which updates to guidance would be posted as released (CAM, Audit Programs, Audit Report Shells) and (2) Reevaluate the continued need for a paper CAM in light of advances in technology and changes in attitudes.

Metric:

Implementation of “flow” guidance update process, and completion of study and reporting results to the ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish a HQs implementation team to transition to “flow” basis for audit guidance dissemination.	PAS and OTS	May 03
2. Implement APPS 5.0 a. In Field. b. Documentation /Implementation of APPS Update Process at HQ.	O	Mar 04
3. Develop a process to deliver CAM to the field on a real time basis. a. Develop a mechanism to deliver CAM updates to auditors in the most effective manner within the constraints of the DCAA network infrastructure. b. Develop a policy interface for CAM (similar to APIS, the policy interface for APPS). c. Convert electronic CAM to format needed to accommodate flow basis.	O / P	Sep 04
4. Develop a process for issuing guidance on a flow basis (APPS/Electronic CAM). Process should:	Implementation Team	Oct 04

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
<p>a. Determine how the nature and importance of guidance changes affects the method and timing of their dissemination.</p> <p>b. Identify best means of notifying auditors of guidance changes such as:</p> <ul style="list-style-type: none"> • Highlights in CAM • Inclusion of a list of CAM changes in APPS • MRD notification of update with background information • E-mail notification <p>c. Reinforce policy on how auditors should deal with differences between guidance sources.</p>		
<p>5. Coordinate and test processes developed in Milestones 3 and 4 with regions.</p>	P / O	Dec 04
<p>6. Identify and prepare best means to publicize flow basis:</p> <ul style="list-style-type: none"> • Bulletin article • Online notice • Presentations at Manager, Quality or FAO staff conferences • MRD 	Implementation Team	Dec 04
<p>7. Train, if necessary and implement flow basis.</p>	P / O / Regions	Mar 05
<p>8. Survey field personnel on effectiveness of flow basis system and recommendations for revisions.</p> <p>Interview CAM users who identified themselves as "99%" users of the paper CAM in the 2002 End-to-End Ad Hoc Survey (and other current "heavy" paper-based users) to identify technological, situational, and behavioral impediments to use of electronic CAM, and identify any actions required to eliminate barriers. Provide specific suggestions for action to Policy for consideration.</p>	Implementation Team	Sep 05
<p>9. Based upon results of survey taken in Milestone 8, draft policy on hard copy CAM for ESC approval.</p>	P	Nov 05

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
10. Present recommendations and status to ESC.	Implementation Team	Dec 05

GOAL 5 – Integrated IT Structure

Objective: G5–04–01

Responsible Element: Resources

By 2006, reduce leased space square footage by 6 percent from the October 1, 2003 baseline.

Metric:

A 6 percent reduction in the square footage of leased office space by September 2006.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Determine the baseline (square footage) of Agency-wide office leased space using September 30, 2003 data.	CM / CF	Mar 04
2. Each Region will assess current leased space, location lease renewals, cost and teleworking practices and develop a plan for reducing space/costs.	Regions	Sep 04
3. Annually, using end of fiscal year data, assess the square footage of Agency-wide office leased space, and report at the December ESC.	CM / CF	Dec 05 - Dec 06

GOAL 5 – Integrated IT Structure

Objective: G5–04–02

Responsible Element: Operations

By FY 2006, assess IT Security processes and procedures and implement enhancements to ensure that DCAA’s Network is effectively protected from external attack and complies with applicable DoD Regulations.

Metric:

All Category I vulnerabilities are mitigated and 85 percent of Category 2 vulnerabilities are mitigated as identified by three consecutive quarterly scans of our network.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Evaluate the regulatory requirements and determine the impact on DCAA. Begin quarterly scans of the DCAA network.	OIT	Sep 04
2. Assess existing capabilities to detect and prevent attacks. Brief ITSC on current status and identified security gaps within the Agency.	OIT / Regions	Nov 04
3. Develop plans to ensure that the network is effectively protected as required by applicable DoD regulations.	ITSC	Feb 05
4. Brief the ESC on plans developed in step 3 above, and recommended enhancements.	ITSC	Mar 05
5. Provide an interim assessment and/or recommendations to the ESC.	ITSC	Sep 05
6. Provide final results to ESC.	ITSC	Sep 06

GOAL 5 – Integrated IT Structure

Objective: G5–04–03

Responsible Element: P / O / C

By FY 2005, assess the employee suggestion program to determine the feasibility of creating a single forum for receiving and evaluating CAM, APPS, DMIS and other suggestions for improving Agency policy procedures or operations.

Metric:

Recommendations on feasibility of “single forum” suggestion program.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish a Focus Group including members from CPO, OIT, OTS, OWD, PAS and two selected regions. (One of the selected representatives will be from the Mid-Atlantic region.)	P / O / C / Regions	Jun 04
2. Analyze the current suggestion systems to determine best practices and identify weaknesses/inefficiencies.	Focus Group	Oct 04
3. Determine feasibility of “single forum” for CAM/APPS/DMIS and Employee Suggestion Program. a. Develop conceptual framework b. Estimate cost of implementation c. Analyze cost/benefit of single program	Focus Group	Jan 05
4. Provide recommendation on feasibility of, and potential description of, a “single forum” suggestion program to ESC.	Focus Group	Mar 05

GOAL 5 – Integrated IT Structure

Objective: G5–04–04

Responsible Element: Operations

By December 2004, assess possible improvements in the DCAA Intranet site including navigation techniques and the search engine.

Metric:

Brief ESC on recommended website changes.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Conduct a webmaster's conference to discuss shortcomings, identify methods of improvements, and identify best practices internally and externally. Make initial determination of types of changes required.	OTS / Regions / CAC Webmasters	Aug 04
2. Assess other search engines to determine if superior products are available using internal evaluations and Gartner services currently available under contract.	OTS / OIT	Sep 04
3. Perform an analysis of the costs associated with alternatives on web redesign and search engines and the related benefits.	OTS	Oct 04
4. Prepare cost-benefit analysis of various alternatives for presentation to the ESC.	O	Dec 04

GOAL 5 – Integrated IT Structure

Objective: G5–04–05

Responsible Element: Operations

By FY 2005, assess DCAA’s computer support service requirements and contracting techniques to maximize use of, or reduce, present spending levels without eroding critical mission needs.

Metric:

Briefing to the ESC.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Establish Agency Focus Group.	ITSC	Jul 04
2. Identify and quantify specific routine maintenance services and determine acceptable service levels – i.e., a realistic amount of time for a service to be performed. Where needed, use studies or other independent data to assess needs and reasonableness of expectations.	ITSC	Dec 04
3. Establish Concept of Operations for managing the contract and monitoring of contractor performance.	ITSC	Feb 05
4. Prepare Statement of Work (SOW) and present results to ESC.	ITSC	Mar 05
5. Implement ESC approved recommendations.	O	Sep 05

GOAL 5 – Integrated IT Structure

Objective: G5–04–06

Responsible Element: Operations

By FY 2005, develop the capability and processes to continuously analyze and review network performance, perform capability planning and identify network improvements necessary to enhance our support of mission requirements.

Metric:

Presentation of recommendations to the ESC for approval.

MILESTONE PLAN	PERFORMANCE ELEMENT	DATE
1. Determine which tools will be used by HQ and Regions.	O and Regions	Jun 04
2. Baseline existing circuit performance.	O and Regions	Sep 04
3. Establish standards for acceptable bandwidth utilization (include cost analysis).	O and Regions	Oct 04
4. Brief the ESC on recommended bandwidth standards.	O and Regions	Dec 04
5. Compare the established standards against the baseline to identify the requirements and assess the impact on the network and the need for changes.	O, C and Regions	Feb 05
6. Present the first analysis report to the ESC.	O, C and Regions	Mar 05
7. Provide quarterly reports to the Regional Directors for review and appropriate action.	O and C	Jun 05