



DEPARTMENT OF ENERGY CAPABILITIES

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A MESSAGE FROM OUR --- PRESIDENT

ClearPlan is a medium-sized service provider to large federal Aerospace and Defense contractors. Founded in 2013, ClearPlan specializes in providing project controls and earned value management (EVM) services to contractors pursuing or performing large, federal cost reimbursable programs.

ClearPlan provides over 250,000 professional service hours per year, we are the leader in U.S. Aerospace and Defense market program and project planning, scheduling, control, and EVM services. With 175+ professional project controls, scheduling, and estimating staff, we have the depth and breadth to provide each service required to ensure our DoD client's EVM systems are compliant with EIA-748 and are able to be validated by DCMA.

Our services include proposing a plan for compliance, tool design and implementation, tool hosting and development of custom "middleware" and dashboards, staff training including tool and EVMS certification training, program architecture and business process optimization services as well as hands-on-the-keys support. ClearPlan also works with established companies who need targeted support pre-or post-award, tool migration, training, government review support and enterprise or program level support.

Because ClearPlan only provides project controls and EVM system services, we have absolute focus on effective and efficient program management in an EVMS compliant environment makes us the go-to team to tackle proposal, program implementations, and corrective measures where there are challenges. It's what we do.

ClearPlan is growing in the Department of Energy marketplace. We are currently supporting DOE-HQ through the PM-30 organization in the development of complex-wide EVM trending tools and supporting compliance audits to ensure DOE client compliance with EIA-748. We understand what DOE leadership wants in an EVM system. We have ensured our DoD clients develop and maintain compliant EVM systems. We can do the same for you.

EVMS does not need to be a 4-letter word. We can help.

Josh Garvey
President

COMPANY

VISION + MISSION

“Our mission from the start is to be the best Federal Program Management service provider in the world. Everything we do is in support of that goal.”



THE FOUR PILLARS OF CLEARPLAN

1. DELIVERY EXCELLENCE

What would we be without an incredible focus on delivery? We wouldn't be the industry leading team that we are. Investment in delivery excellence is what sets us apart. We not only invest in our people with strong management and world-class training, we invest in our own version of “skunk works” with the indirect personnel and infrastructure to support development, training, problem solving and tool building for our staff. Delivery is our foundation.

3. CORPORATE CULTURE

In order to be the best, you have to attract and retain the best. In order to attract and retain the best, we have to have a compelling culture. We invest in our people by bringing them together twice a year to a common location in the USA, to train, benchmark, share industry insights, form relationships, and most of all, strengthen our team's delivery capability. Our clients know they are getting the benefit of incredibly broad industry insights, and our people know they can call an expert anywhere throughout our firm to help solve unique problems.

2. SUPPORTIVE LEADERSHIP

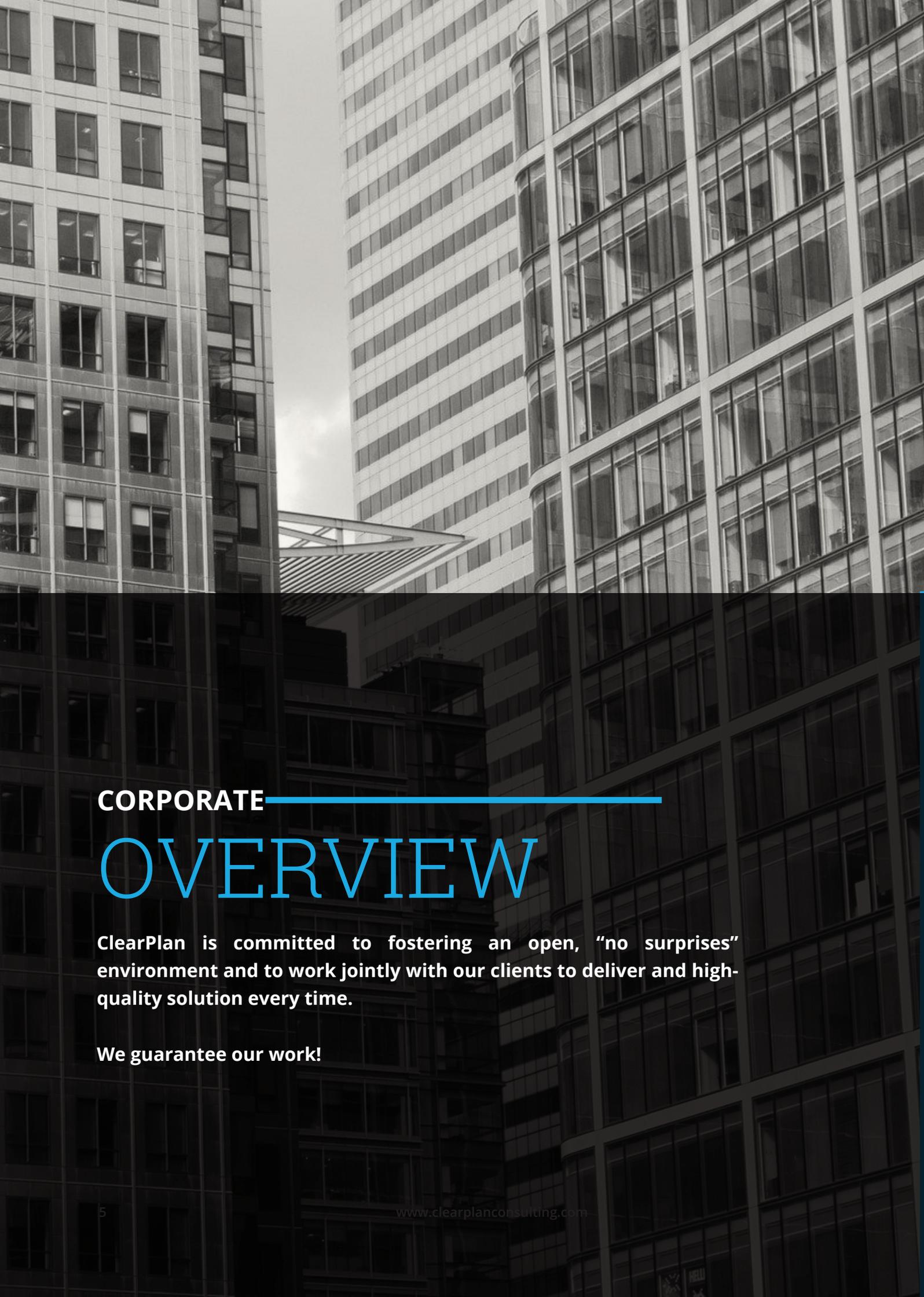
Our leadership staff is comprised of seasoned pros in our industry. Each one has over 15 years and most over 20 years of experience delivering on the toughest projects in industry. This uncommon, deep insight our managers have gained from the most complex development programs in industry. Our delivery is successful because our managers intimately understand the issues implementing a compliant EVM system. Therefore, they can hand pick the right staff for each delivery teams to ensure exemplary service. They stay involved and work through any challenges that arise along the way.

4. INDIVIDUAL EXCELLENCE

At the heart of it all is the work each one of our people does every day. We have worked hard to build a culture of individual excellence. We vet each staff member with numerous interviews before we actually conduct skills testing of prospective candidates...tests that we developed because we know the industry and requirements...to ensure the staff we provide have the requisite skills to implement a compliant EVM system for our clients. We maintain our standards so we can deliver. We don't compromise in our selection of staff so you have the best possible staff member serving you each and every day.

CONTENT

MESSAGE FROM OUR PRESIDENT	2
.....	
COMPANY VISION AND MISSION	3
.....	
CORPORATE OVERVIEW	5
.....	
INDUSTRY AFFILIATIONS	7
.....	
COMPANY LEADERSHIP	8
.....	
COMPANY AWARDS & TESTIMONIALS	11
.....	
INDUSTRY LEADERSHIP	13
.....	
SERVICES	14
.....	
<i>EARNED VALUE MANAGEMENT</i>	15
.....	
<i>PROJECT SCHEDULING</i>	17
.....	
<i>PROJECT CONTROLS</i>	18
.....	
<i>PROGRAM INTEGRATION & TECHNOLOGY (PIT)</i>	19
.....	
<i>TRAINING</i>	20
.....	
CONTACT US	21



CORPORATE

OVERVIEW

ClearPlan is committed to fostering an open, “no surprises” environment and to work jointly with our clients to deliver and high-quality solution every time.

We guarantee our work!

CLEARPLAN

... AT A GLANCE

ClearPlan is a privately held, federally recognized small business (NAICS 541330 Engineering Services) that provides Earned Value Management (EVM), Implementation, and Program Planning and Control services to Fortune 500 companies nationwide.

With over seventy-five (75) clients in nearly thirty (30) U.S. states, ClearPlan provides program control and Earned Value Management System (EVMS) services to some of the largest and most complex programs.



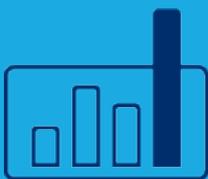
170+

Consultants Nationwide



75+

U.S. Clients



50+

**Project Controls Tool
Implementations**



6
in the last
2 years

EVMS Validations



1M+

**Hours of Delivery
Excellence**



30+

**States Currently Operating
In**

INDUSTRY AFFILIATIONS

CLEARPLAN IS PROUD TO BE AFFILIATED WITH THE FOLLOWING ORGANIZATIONS:



WHO WE ARE

COMPANY LEADERSHIP

... MEET THE CLEARPLANNERS

A TEAM YOU CAN TRUST

ClearPlan is the absolute go-to company for effective project planning and control solutions for the most complex industry programs. Delivering nationwide with unparalleled excellence and the industry's largest and deepest PP&C/EVMS capability, ClearPlan is here for the long-haul.

The Leadership Team at ClearPlan fosters this culture of delivery excellence. We are the vendor of choice for our clients, and employer of choice for our employees.

Meet the ClearPlan leadership team...



JOSH GARVEY

PRESIDENT

Joshua Garvey owns and operates ClearPlan, a medium-sized service provider to large federal Aerospace & Defense contractors. Founded in 2013, ClearPlan specializes in providing services to contractors who are pursuing or performing large, federal cost reimbursable programs. ClearPlan is the US A&D market leader in program planning, scheduling, program control and EVMS services. ClearPlan has the depth and breadth to provide all of the services required to get a new entrant to this market EVMS validated by DCMA.

These services can include proposing a plan for compliance, tool design and implementation, tool hosting and custom “middleware” and dashboard development, staff training including tool and EVMS certification training, program architecture and business process optimization services as well as hands-on-the keys support. ClearPlan also works with established companies who need targeted support pre- or post-award, tool migration, training, government review support and enterprise or program level support. It’s all we do and we are the market leader. ClearPlan’s team is US based, all of our employees are US Citizens.

Mr. Fish is a proven program planning & controls leader with expertise in all aspects including proposal development, planning, budgeting, integrated cost and schedule baseline development, change control and change management, reporting, financial planning, forecasting, program performance, earned value management, enterprise cost & schedule management tools development and implementation, cost and price analysis, and business intelligence implementations.

He specializes in large, complex ACAT 1 defense development programs.

His experience includes support to several programs for the largest defense contractors such as Boeing, Raytheon, L3Harris, Northrop Grumman, and several others.

In his current role as a Sr Manager at ClearPlan, Scott is responsible for all aspects of program implementations, employee development, as well as internal & client training delivery.

SCOTT FISH

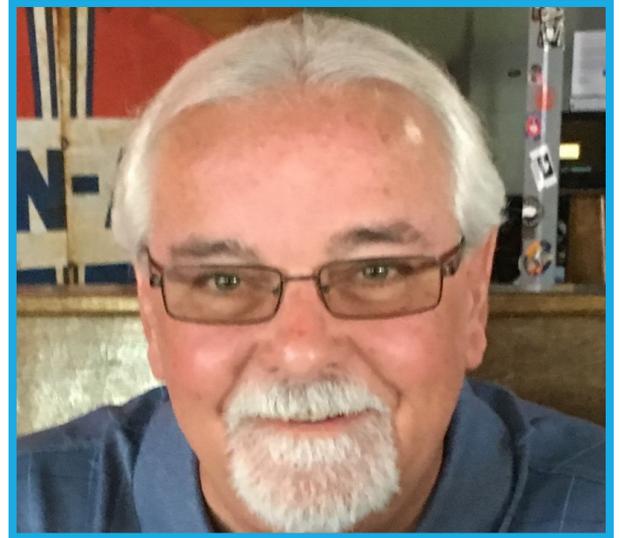
SENIOR MANAGER



DAN LYNCH

SR CONSULTANT

Mr. Lynch has more than 40 years of Integrated Program Management experience in the defense industry within the design, development, and production environments with Raytheon, BAE Systems, and RCA Corporation. He was a senior member of the Raytheon Missile Defense (RMD) Program Management Excellence Directorate. RMD is a multi-billion-dollar annual sales operation. He was responsible for ensuring that the RMD EVM system was ANSI-EIA-748 compliant and externally validated (with a perfect score by DCMA!). His primary focus today is on Implementation and Compliance of Integrated Program Management (IPM) Systems and supporting Integrated Baseline Reviews, Integrated Program Management analysis, and project oversight.



JANAY BLOCH

MANAGER



Ms. Bloch has over 25 years of experience in project controls and management in support of both Industry and Government contractors. She specializes in program and project planning and scheduling, with an emphasis in ensuring implementation of compliant EVM systems. As a manager at ClearPlan Consulting, she provides on-site program and project controls support, including planning and scheduling during all phases of project execution. She also develops and delivers client-specific EVMS training.

She has supported the DOE-HQ PM- 30 organization as the planning and scheduling lead on data-driven EVMS surveillance reviews of Bechtel National Inc (BNI) in Richland, Washington, and Flour Federal Petroleum Operations in New Orleans, Louisiana.

COMPANY AWARDS



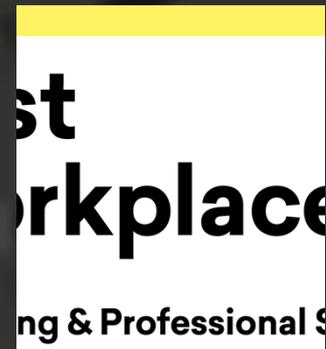
GREAT PLACE TO WORK

Great Place to Work® is the global authority on workplace culture. Since 1992, they have surveyed more than 100 million employees around the world and used those deep insights to define what makes a great workplace



INC. 5000

Inc. 5000 is an annual guide to the 5,000 fastest-growing privately held companies in the U.S...and how they reached their lofty heights



GREAT PLACE TO WORK: CONSULTING

The Best Workplaces in Consulting & Professional Services award is based on analysis of survey responses from more than 463,000 current employees across the U.S. In that survey

WHAT OUR PEOPLE SAY

TESTIMONIALS FROM SOME OF OUR CLEARPLANNERS



MIKE O.

I am proud to be a part of the ClearPlan team, for sure. I have been lucky to work for some great companies during my career and met a lot of outstanding people. However, ClearPlan seems to be bringing on the sharpest and brightest people from all over the industry so there is a high concentration of highly skilled people within ClearPlan to lean on and learn from with each new assignment.

HAMIDA T.



The support system at ClearPlan is amazing. The professionalism, and the genuine concern of my wellbeing at home and work from Josh down to my line manager makes it easy for me to ask for assistance or information. Not to mention the moral boosters that we have throughout the year.

DAVID H.



ClearPlan's leadership here really reinforces that you aren't alone—that you have world-class resources available to help you overcome any obstacles you may encounter—while also trusting you to build your relationship with your client and deliver independently.

DIVERSITY

ClearPlan fosters a workplace built from people of all backgrounds. As an Equal Opportunity Employer (EOE), we welcome people of all races, sexes, genders, sexual orientations, religions, and ethnicities.



INDUSTRY LEADERSHIP



IP2M METRR

ClearPlan is supporting a DOE-sponsored Joint Research Study led by Arizona State University (ASU) and representing 15+ government and industry organizations during development of a metrics based EMV trending tool. Called the Integrated Project/ Program Management (IP2M) Maturity and Environment Total Risk Rating (METRR), the tool uses EVM metrics as a novel assessment mechanism. The tool assesses a spectrum of EVMS maturity and environment issues centered around the 32 ANSI/EIA-748 EVMS Guidelines, while also referencing PMI's ANSI Standard for EVM (2019) and ISO 21508:2018 guidance.

By using the IP2M METRR to assess both the maturity and environment of the project and program's EVMS, project leaders and personnel can understand the efficacy of their EVM system. The tool also helps identify opportunities for improvement. The goal of performing this assessment is to assure project/program participants are working with accurate, timely, and reliable information to manage their work, leading to successful project/program performance.

Led by Mr. Dan Lynch, ClearPlan is serving as an active participant and key contributor to the IP2M METRR Joint Research Study. The Study's leadership team considers ClearPlan a reliable and educated member of the study, providing non-biased and useful feedback to stakeholders.

READ MORE

Read our IP2M METRR
(ASU EVMS Study) at

www.energy.gov/projectmanagement



DOE REVIEW SUPPORT

In 2019, ClearPlan (as a subconsultant to TechSource, Inc.) was asked to support a surveillance review of DOE-EM's largest capital project, the Waste Treatment & Immobilization Plant (WTP) Project, which is located on the Hanford Site in southeastern Washington State. ClearPlan provided support to the PM-30 organization-led review team, which followed an incremental process that involved frequent communications between PM, the WTP Federal team, and the contractor leading up to an on-site visit. Clear communication, collaboration, and the alignment of expectations were key to the successful execution of the EVMS Surveillance Review in the timeframe allotted. Upon completion of the review, ClearPlan made significant contributions to PM's final report to DOE EM and the cognizant contracting officer with several conclusions and recommendations, including findings and requests for corrective action.

OUR

SERVICES

We possess the essential solutions, staff, and skills to establish and manage comprehensive plans and schedules - from developing winning responses for our client's proposal, establishing a performance measurement baseline, and managing changes for our clients. We have extensive experience with common industry tool-sets such as Microsoft Project, Open Plan, Primavera P6, gained through supporting clients on their largest, most complex programs such as Waste Treatment Plant (WTP), DUF6, F-35, GPS, and more. ClearPlan's also delivers hands-on, instructor-led training for all project controls skill sets and experience levels.

EARNED VALUE MANAGEMENT

GAP ASSESSMENT/ SURVEILLANCE

Whether your organization is seeing an EVMS requirement for the first time, or you have a fully compliant and validated EVM System, ClearPlan can help. ClearPlan's team of EVMS experts use a structured approach to provide your organization a comprehensive assessment of your current systems, procedures, and program teams against the 32 guidelines in the EIA-748 standard.

GAP ASSESSMENT INCLUDES:

- Assessment Kickoff
- Data Call
- Program Artifact Review
- Business Processes and Procedures Review
- Program Management Tools Review
- Program and support staff interviews
- Comprehensive Scorecard and Out brief
- Implementation Roadmap

CERTIFICATION REVIEW PREPARATION

ClearPlan's experts can help your organization prepare for the government's EVMS Certification Review. We start by conducting a Gap Analysis, which is a comprehensive assessment of your current EVMS. The Gap Analysis includes deep dives into process documentation, tools, and program personnel. From there, we help our clients create a Compliance Roadmap that details each step of the process from your current condition to EIA-748 compliance, all the way through the formal Certification Review and Corrective Action Planning. ClearPlan's EVMS experts have experience leading these reviews for the government, so we are uniquely positioned to help our clients prepare for the Certification Review.

CERTIFICATION REVIEW SUPPORT INCLUDES:

- Data Calls
- Comprehensive Gap Assessment and Validation
- Compliance Roadmap Development
- Cost, Schedule, EVMS Analyst Training (formal and OJT)
- Mock Interviews for CAMs, PM, and functional support staff
- Self-certification Support
- External Certification Support
- Corrective Action Planning and Closure

EARNED VALUE MANAGEMENT

EVMS CERTIFICATION

If the contract value is under the validation threshold, more often we are seeing requirements for 3rd party EVMS certifications for contractors to show compliance against the EIA-748 Guidelines. ClearPlan's EVMS Certification is a comprehensive approach to meeting this requirement.

CLEARPLAN EVMS SME'S WILL HELP:

- Implement an integrated EVMS tool suite
- Create or augment EVM Process Documentation
- Provide Program Baseline and Execution Support
- Provide training (both formal and OJT) for cost, schedule, and EVM functional support staff
- CAM Training and Certification
- Comprehensive System Compliance Review culminating with an EVM
- Certification Letter from ClearPlan

PROPOSAL SUPPORT

The RFP has an EVMS requirement, but you don't have a validated EVMS system. What do you do? **Call ClearPlan.**

ClearPlan has helped several clients develop and submit an EVMS plan with their proposal.

PROPOSAL SUPPORT INCLUDES:

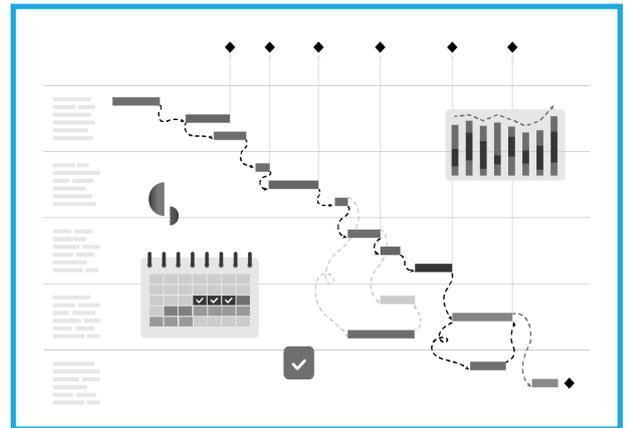
- Describing the EIA-748 compliant EVMS the client will use during program execution
- Providing an EVMS scorecard highlighting the system upgrades and modifications proposed in order to meet the EIA-748 32 guidelines
- Providing a high-level milestone plan indicating when the system will achieve EVMS compliance
- Describes the application to subcontractors
- Developing a schedule that provides a timetable of events leading up to Government validation of the EVMS.

ClearPlan offers Cloud Solutions complete with integrated EVM toolsets! A great option for getting stood up quickly, or reducing IT investment

PROJECT SCHEDULING

Our consultants possess the essential skills and solutions to establish and manage comprehensive plans and schedules - from developing winning responses for proposals, establishing a performance measurement baseline, and change management through contract closure. As a result of supporting over 50 clients on \$500 Billion of work requiring EIA-748 compliance, we have become the industry leader with common project scheduling toolsets such as Microsoft Project Open Plan Professional, Primavera P6.

We establish sound planning techniques early, so risks can be reduced while increasing the probability of executing to, or ahead of plan. Our robust project structures become building blocks to comprehensive plans that provide management, the customer, and project stakeholders with high confidence that the contractual scope has been captured. This sets the stage for analyzing progress, assessing forecasts, and ultimately capture actuals for metrics tracking and trending.



By thoroughly analyzing the statement of work and your organizational requirements, we coordinate with all stakeholders to merge the technical scope, cost, schedule and performance parameters into a low risk, executable baseline plan. We develop the appropriate hierarchy of visibility from Integrated Master Plans (IMP) and Contractor Work Breakdown Structures (CWBS) to Tiered IMS, allowing stakeholders at all levels a means to validate project performance towards contractual obligations.

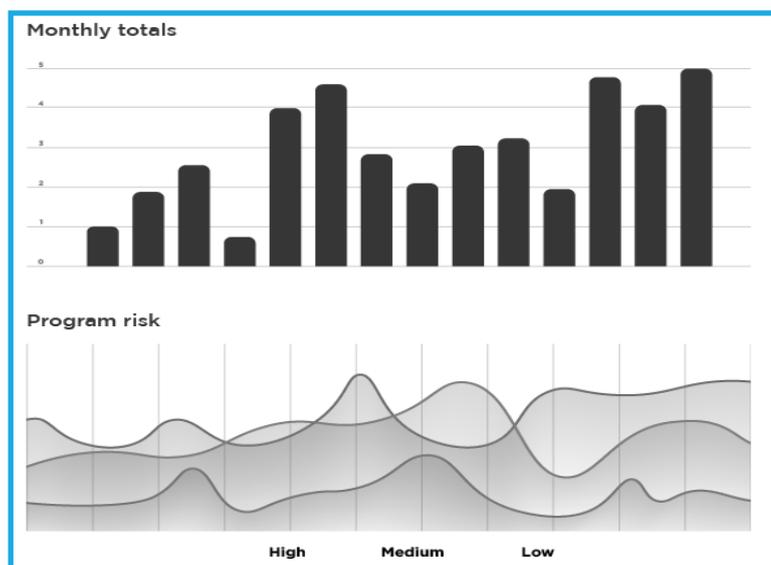
**EXPERTISE AND SOLUTIONS
DURING ALL PHASES OF A
PROJECT**

- **Resource-Loaded Schedule Development**
- **Proposal Development**
- **Project Start-up/IBR**
- **Project Execution**
- **Baseline Control / Change Management**
- **Production & Sustainment**
- **Program Close-Out**

PROJECT CONTROLS

ClearPlan provides the essential capabilities to analyze and interpret data in order to predict and constructively influence management decision making to prevent negative impacts on the time and cost outcomes of a project. From ensuring an executable plan is in place for a successful Integrated Baseline Review (IBR), to recovering from deviations and documenting change, we provide solutions for executing to plan!

The Performance Measurement Baseline (PMB) provides a benchmark by which stakeholders can assess the project's performance to plan, though keeping it in control requires the use of predictive indicators to drive out threats and capitalize opportunities.



- **BASELINE (IBR) PREP**
- **COST/SCHEDULE INTEGRATION**
- **PROCESS IMPROVEMENTS**
- **ESTIMATE AT COMPLETE (EACS)**
- **RISK MANAGEMENT**
- **CHANGE MANAGEMENT & DOCUMENTATION**

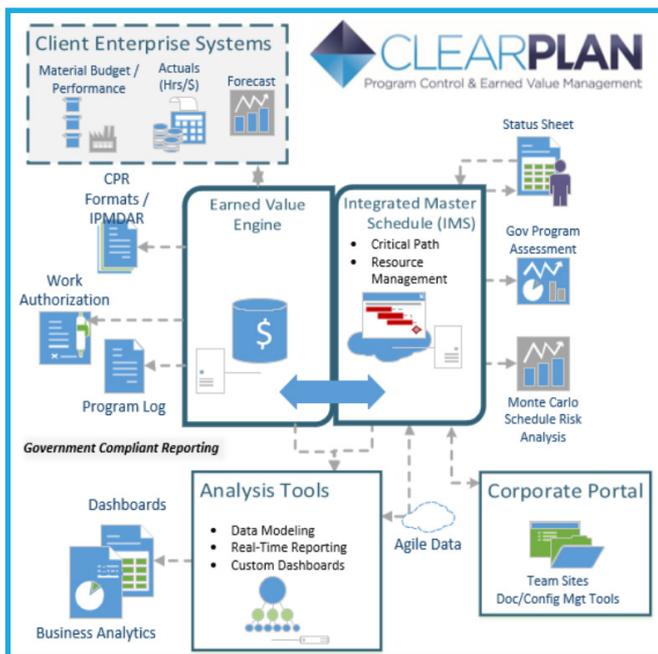
Change is inevitable in any project or program, which emphasizes the need for advanced forecasting methods, what-if analysis, proper communication and documentation to maintain budget and profit targets. Whether it is an over-targeted schedule or baseline, internal or external change requests, we can make what can be a chaotic process systematically sane by pairing the right expertise with an efficient, integrated tool set.

PROGRAM INTEGRATION & TECHNOLOGY (PIT)

From the latest versions of Deltek Cobra and Primavera P6 EPPM, ClearPlan provides a low-risk, implementation process to all facets of project management tools and technology. ClearPlan understands how an EIA-748 compliant system functions and the need for data integration throughout your EVMS system. We optimize solutions that fit your organization and business needs.

ClearPlan brings extensive experience in all major EVMS tools and processes, including third-party software and middleware integration. Our staff have implemented Deltek Cobra for large, organizations as well as tier 2 and tier 3 subcontractors who are new to EVMS and establish necessary rigor to gain and maintain compliance.

Led by ClearPlan's Program Integration and Technology (PIT) "PITCrew", our implementation process follows a system engineering framework, beginning with requirements identification. From there, ClearPlan works with our clients to define an optimal EVMS architecture. Each aspect of our client's EMV system, including processes and procedures, are formally documented - from the formal EVMS System Description to desktop work instructions.



CLEARPLAN'S IMPLEMENTATION EXPERTISE INCLUDES ALL MAJOR ENTERPRISE PROJECT MANAGEMENT AND REPORTING TOOLS, INCLUDING:

- Primavera P6
- Deltek Cobra
- Encore Analytics
- EVMSforProject
- Microsoft Project
- Microsoft Power BI

Throughout the implementation, ClearPlan works directly with our client's project team to provide invaluable OJT for the project controls analysts who will be running the system post-implementation.

We conduct system training for all impacted staff members. Finally, prior to an exterior certification, we develop and implement a self-certification of the system. We then sit with our clients as the external assessment is conducted. Finally, we support corrective action implementation and closure to ensure the EMV system is robust and ready to provide the services for which it was designed.

TRAINING

TRAINING OTHERS IS OUR SPECIALTY

ClearPlan leverages decades of industry experience to equip students with the skills necessary to implement and execute a top-tier Integrated Program Management framework.

All training courses can be delivered as-built, or can be fully customized to suit our clients' specific training goals.

- Instructor-Led
- Industry Best Practices
- On and Off-Site Hosting Options Available
- ClearPlan Quadcopter- Our Proprietary Mock ACAT 1 Data Set

PM TRAINING	EVMS TRAINING	SCHEDULING TRAINING	TOOLS TRAINING
Program Management Fundamentals	CAM Training & Certification	Essentials of Project Scheduling	Deltek Cobra for Analysts or Admins
Performance Management	EVMS 101	Intermediate Project Scheduling	EVMS for Project for Analysts
OJT / Mentorship	Validation Review Preparation	Advanced Project Scheduling	MS Project Desktop
	Mock IBRs	Program Planning	MS Project Server / Online for Analysts or Admins
	Custom EVMS Courses	Program Architecture	PowerBI / Dashboarding / Reporting
		Custom Scheduling Courses	Milestone Professional

CONTACT US

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CLEARPLAN