



# Deltek INSIGHT > 2019

## **PPM-18:**

We Don't Have an EVMS:  
How Do We Bid On A  
Contract With An EVMS  
Requirement?

Dave Scott, BDO,  
Program Optimization and Project Controls

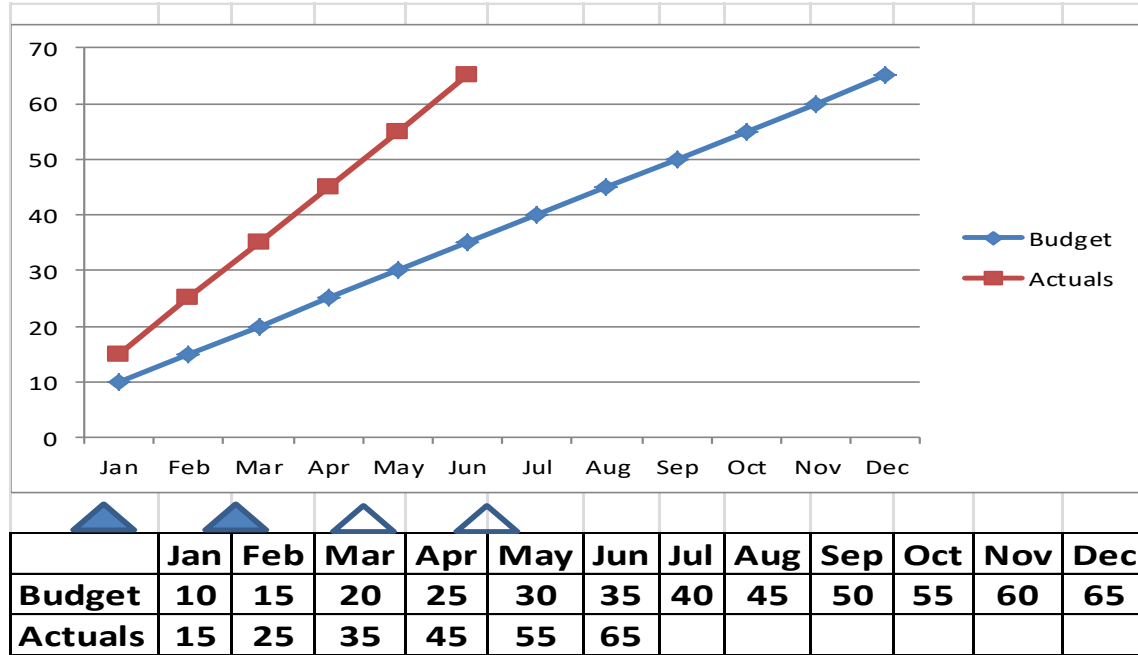
# Learning Objectives



# What is EVM and an EVMS?

# Traditional Project Management Approach

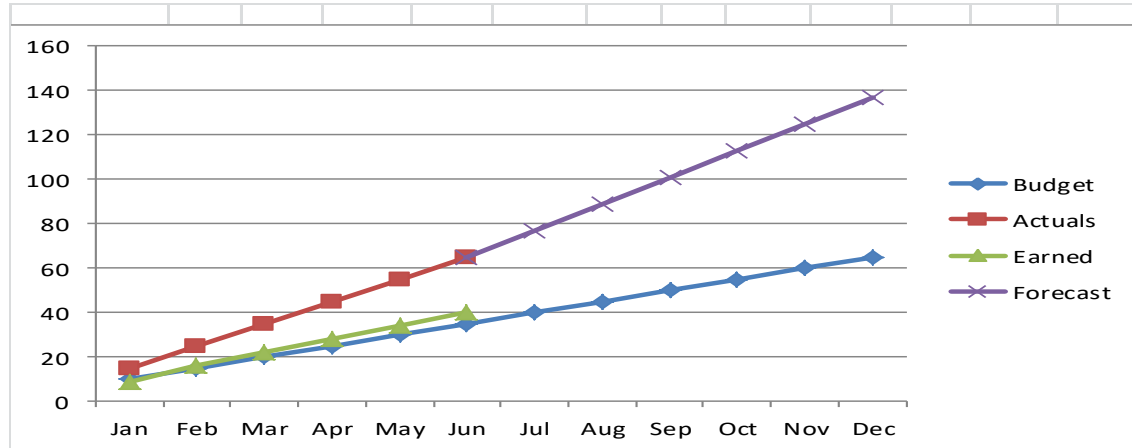
## Budget vs. Actual Costs



How do we know how much work was accomplished? Based on how much was spent?  
 The passage of time? Or do we measure performance on an educated guess?

# Earned Value Management Approach

## Budget (Planned Value) vs. Actual Costs vs. Earned Value



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Budget</b>	10	15	20	25	30	35	40	45	50	55	60	65
<b>Actuals</b>	15	25	35	45	55	65						
<b>Earned</b>	9	16	22	28	34	40						
<b>Forecast</b>						65	77	89	101	113	125	137

(BCWS)  
(ACWP)  
(BCWP)  
(EAC)

How do we know how much work was accomplished? EVM is an objective measure of performance.

# EV, EVM, and EVMS

## Earned Value

A key project management metric that is based on a predetermined value assigned to work and earned when that work is performed

- It is compared with Planned Value and Actual Cost

## Earned Value Management (EVM)

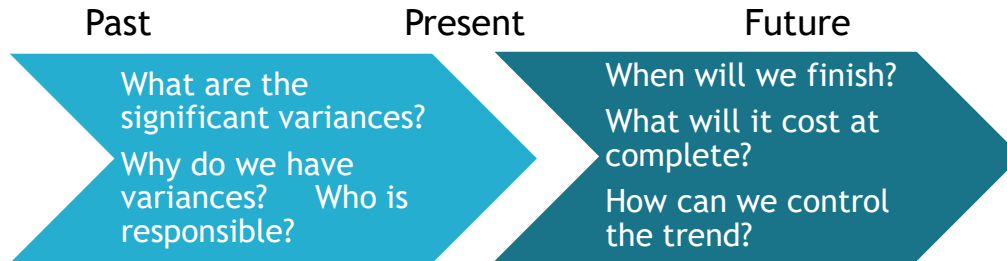
- Program/project management methodology and a performance measurement methodology that integrates scope (what) with schedule (how long) and budget (how much)
- The use of EV and other related performance measurement metrics to:
  - ✓ Identify and resolve scope, cost, and schedule variances
  - ✓ Forecast completion dates and derive estimates of costs at completion

## Earned Value Management System (EVMS)

- Integrated set of people, processes, policies, trainings and tools that comprise an overall system for planning and controlling a project's scope, cost, and schedule.

# Why is EV useful?

We analyze the past performance .....to help us control the future

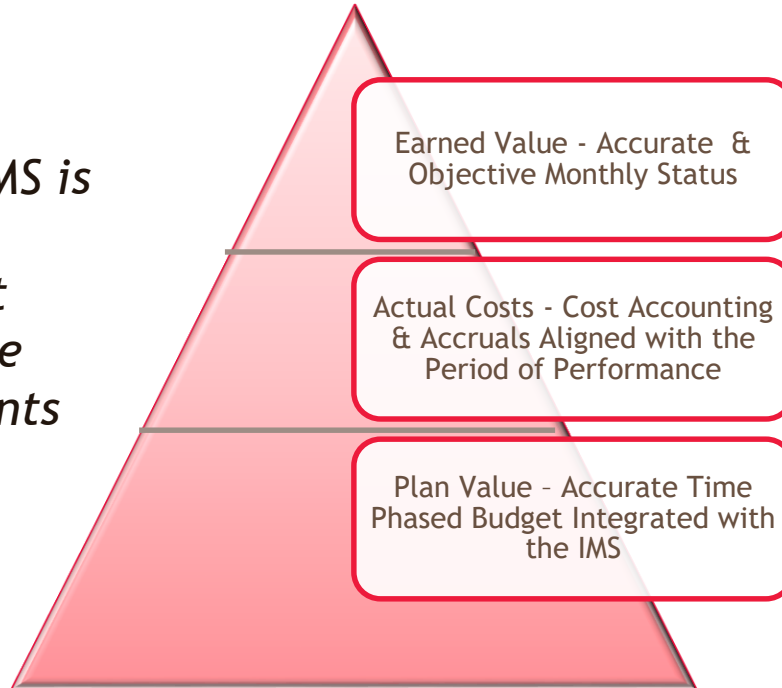


## Answer 2 key questions

1. Did we get what we wanted for what we spent?
2. At the end of the project, is it likely that the cost will be less than or equal to our original estimate?

# EVM System Foundation

*In order to ensure the EVMS is providing accurate performance management information you must have these foundational elements*





# What does EVM Measure?

## Performance Measures

- Cost Variance (CV)
  - The value of work performed - actual costs of performing the work
  - $CV = EV - AC$  and  $CV\% = CV / EV * 100$
- Schedule Variance (SV)
  - The value of work performed - the value of the work scheduled
  - $SV = EV - PV$  and  $SV\% = SV / PV * 100$
- Cost Performance Index (CPI)
  - A measure of cost efficiency, how much work was performed for each dollar spent
  - $CPI = EV / AC$
- Schedule Performance Index (SPI)
  - A measure of schedule efficiency, how much work was performed for each dollar planned
  - $SPI = EV / PV$

# EVMS System Components

## People

- Project Managers, Control Account Managers, Schedulers, Project Cost (EV) Analysts and Management
- Provide adequate training to understand roles and to gain buy in/ensure accountability for these roles

## Processes

- Business processes should be updated to reflect implementation of earned value
- Processes should be documented and widely available

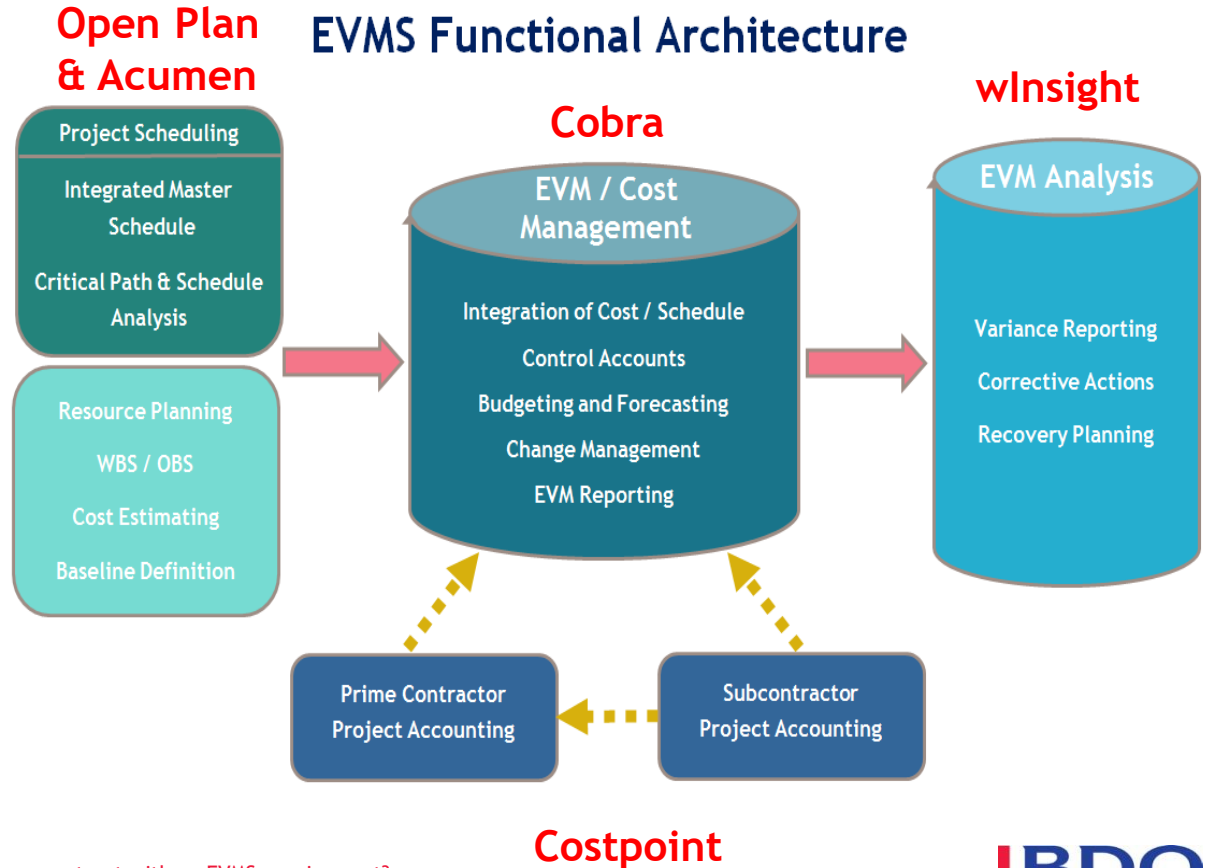
## Tools

- Use proven and compliant tools that are right for your organization
- Spend time during the implementation to install and configure tools the right way

# Tools

EVMS implementations typically follow traditional business system implementation process:

1. Requirements Definition
2. System Design
3. Implementation
4. Pilot Project (Testing)
5. Deployment of EVMS



## Besides Compliance - why do EVM?

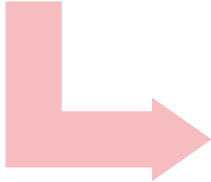
- EVM is a proven Project Management methodology which is accepted by the Project Management Institute (PMI), GAO, OMB, and DoD
- EVM re-enforces project management best practices such as planning and scheduling
- EVM accurately measures project performance and enables an 'early warning' system to identify potential project issues while there is still time to react
- Opens the door to new opportunities requiring the implementation of a compliant EVMS - i.e. multi-award contracts like the GSA Oasis Contract

# What are the government requirements?

# How is EVM Applied on Government Contracts?

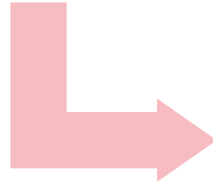
OMB Circular A11 Part 7, Capital Programming Guide Supplement

- All major acquisitions with development efforts require the use of an EVMS compliant with EIA-748. The Agency must use EVM for their work and consolidate the contractor's EVM reporting, Requires IBR) and sets 10% variance threshold



Federal Acquisition Regulations (FAR), 34.201 EVMS, 34.202 IBR

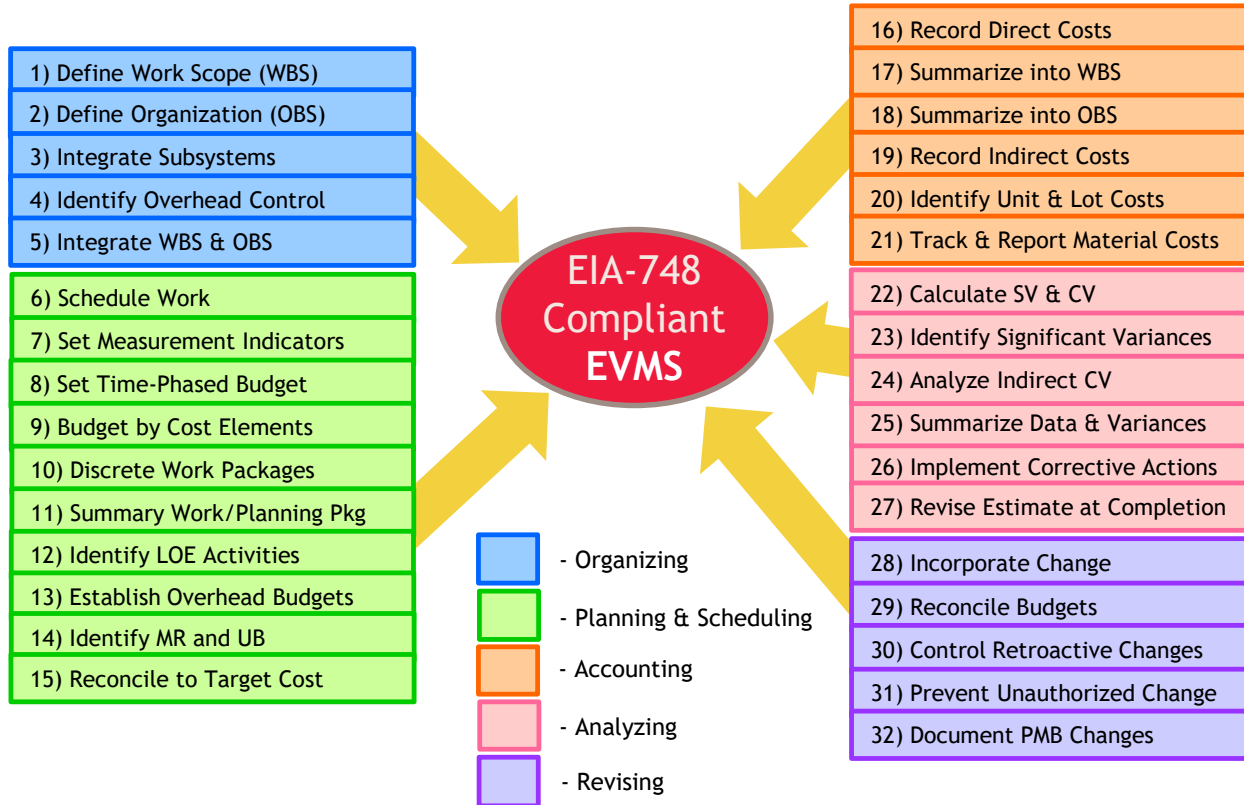
- IAW OMB Circular A-11 Part 7
- EIA-748 compliant EVMS required for major acquisitions for development. EVMS approved by CFA.
- If the contractor doesn't have a compliant system they must provide a plan.
- Requires monthly reporting and prime must flowdown to subcontractors.



Defense Federal Acquisition Regulations Supplement, 252.234-7001, 252.234-7002, CDRL's/DID's IPMR Reporting

- Notice of EVM, Contract >\$20M EIA-748 compliant or plan to implement, >\$100M must certify
- Provide for generation of timely, reliable, and verifiable information. IBR < 180 days

# EIA-748 EVM Guidelines Overview



# FAR EVM Requirements

**FAR 34.201 Earned Value Management System** a) is required for major acquisitions for development, in accordance with OMB Circular A-11,

- b) if EVMS is proposed to comply with an ANSI/EIA Standard -748 a comprehensive plan to comply with these standards is
- c) Monthly Reports,
- d) apply to subcontractors
- e) provide an EVMS plan as part of the proposal



# DFAR EVM Requirements

## DFARS 252.234-7001 Notice of Earned Value Management

- RFP clause states 1) Offeror shall provide documentation that Cognizant Federal Agency has determined the proposed EVMS complies with the ANSI/EIA-748 Guidelines
- If Offeror proposes to use an EVMS not validated- must submit plan for compliance
  - As prescribed in DoD 5000.2, compliance with ANSI/EIA-748 is required for DoD cost or incentive contracts and agreements valued at or greater than \$20M.
  - Contracts = or > \$100M require a formal validation of the contractor's EVMS

# EVM Reporting Requirement

Agency	IPMR Formats	IBR	Certification	Surveillance
DOD < \$20M	Optional formats 1, 5, & 6	Yes	Optional	Optional
DOD > \$20M < \$50M Contracts	Formats 1, 5, 6 & 7	Yes	Optional	Optional
DOD >= \$50M Contracts	Formats 1 - 7	Yes	Optional	Optional
DOD >= \$100M Contracts	Formats 1 - 7	Yes	Yes	Yes
DOE > \$50M < \$100M Contracts	Formats 1 - 5	Yes	Yes	Yes
DOE >= \$100M Contracts	Formats 1 - 7	Yes	Yes	Yes
NASA >= \$20M	Formats 1 - 5	Yes	Yes	Yes

All Civilian agencies are required to establish EVM policies but they vary significantly

# IPMR Format 1

Unclassified

CLASSIFICATION (When Filled In)

INTEGRATED PROGRAM MANAGEMENT REPORT

PENDING UPDATE TO

FORMAT 1 - WORK BREAKDOWN STRUCTURE

DOLLARS IN

Dollars

CMB No. 0704-0188

Contract and Contractor Information

<b>1. CONTRACTOR</b>		<b>2. CONTRACT</b>		<b>3. PROGRAM</b>		<b>4. REPORT PERIOD</b>	
a. NAME Space Research Alliance		a. NAME Titan II Orbiter		a. NAME Titan II Orbiter Project		a. FROM (YYYYMMDD) 2001/12/01	
b. LOCATION (Address and ZIP Code) Houston, TX		b. NUMBER TX-4230-298345		b. PHASE I		b. TO (YYYYMMDD) 2001/12/31	
e. TYPE CP		d. SHARE RATIO		e. EYMS ACCEPTANCE X NO YES (YYYYMMDD)			

EAC Cost Cases

<b>5. CONTRACT DATA</b>							
a. QUANTITY	b. NEGOTIATED COST	c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	d. TARGET PROFIT/LOSS	e. TARGET PRICE	f. ESTIMATED PRICE	g. CONTRACT CEILING	h. ESTIMATED CONTRACT CEILING
1	29,268,771	0	0	0	0	29,268,771	0
<b>6. ESTIMATED COST AT COMPLETION</b>				<b>7. AUTHORIZED CONTRACTOR REPRESENTATIVE</b>			
MANAGEMENT ESTIMATE AT COMPLETION (1)		CONTRACT BUDGET BASE (2)		VARIANCE (3)		a. NAME (Last, First, Middle Initial) Arthur Longeburger	
a. BEST CASE 0						b. TITLE Program Director	
b. WORST CASE 0						c. SIGNATURE	
e. MOST LIKELY 0		29,268,771		29,268,771		d. DATE SIE (YYYYMMDD)	

Performance Metrics

<b>8. PERFORMANCE DATA</b>																		
VBS (3)	CURRENT PERIOD						CUMULATIVE TO DATE				REPROGRAMMING ADJUSTMENTS			AT COMPLETION				
	BUDGETED COST		ACTUAL COST		VARIANCE		BUDGETED COST		ACTUAL COST		VARIANCE		COST	SCHEDULE	BUDGET	BUDGETED	ESTIMATED	VARIANCE
	WORK	WORK	COST	WORK	SCHEDULE	COST	WORK	WORK	COST	WORK	SCHEDULE	COST	(12a)	(12b)	(13)	(14)	(15)	(16)
ITEM	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12a)	(12b)	(13)	(14)	(15)	(16)	
1.1 Management		124,938	124,938	91,164	0	33,774	374,815	374,815	270,495	0	104,320	0	0	0	6,759,720	4,878,488	1,881,232	
1.2.1 Design		0	0	0	0	0	203,121	203,121	0	0	203,121	0	0	0	203,121	0	203,121	
1.2.2 Build		0	0	0	0	0	0	0	485,444	0	-485,444	0	0	0	6,246,491	6,693,380	-452,890	
1.2.3 Test		0	0	0	0	0	0	0	0	0	0	0	0	0	1,832,265	1,832,265	0	
1.2.4 Launch Preparation		0	0	0	0	0	0	0	0	0	0	0	0	0	1,033,779	1,033,779	0	
1.2.5 Launch		0	0	0	0	0	0	0	0	0	0	0	0	0	721,511	721,511	0	
1.2.6 Materials		851,506	819,616	665,030	-31,890	154,586	1,935,382	1,173,503	1,292,426	-761,879	-118,923	0	0	0	10,303,827	6,837,302	3,466,525	
b. COST OF MONEY	N	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
e. GENERAL AND ADMIN	N	178,655	174,877	141,402	-3,778	33,475	466,032	324,973	383,028	-141,059	-58,055	0	0	0	4,964,181	3,979,085	985,095	
d. UNDISTRIBUTED BUDGET		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
e. SUBTOTAL		976,444	944,554	756,194	-31,890	188,360	2,513,318	1,751,439	2,048,368	-761,879	-296,927	0	0	0	27,100,794	22,002,725	5,097,969	
f. MANAGEMENT RESERVE		0	0	0	0	0	0	0	0	0	0	0	0	0	2,168,057	0	2,168,057	
g. TOTAL		976,444	944,554	756,194	-31,890	188,360	2,513,318	1,751,439	2,048,368	-761,879	-296,927	0	0	0	29,268,771	22,002,725	7,266,046	

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# IMPR Format 5

Contract and Contractor Information



Variance Details by WBS



Variance Explanation



Unclassified									
CLASSIFICATION (When filled in)									
INTEGRATED PROGRAM MANAGEMENT REPORT								PENDING UPDATE TO	
FORMAT 5 - Explanations and Problem Analysis								OMB No. 0704-0188	
1. CONTRACTOR		2. CONTRACT		3. PROGRAM				4. REPORT PERIOD	
a. NAME		a. NAME		a. NAME				a. FROM (YYYYMMDD)	
Space Research Alliance		Titan II Orbiter		Titan II Orbiter Project				2010 / 12 / 01	
b. LOCATION (Address and ZIP Code)		b. NUMBER		b. PHASE				b. TO (YYYYMMDD)	
Houston, TX		TX-4230-298345		I				2010 / 12 / 31	
c. TYPE		d. SHARE RATIO		g. EVMS ACCEPTANCE					
CP		.		X		NO		YES (YYYYMMDD)	
5. Evaluation									
5.1 Management									
	Budget	Earned	Actuals	SV in \$	SV in %	CV in \$	CV in %	SPI	CPI
Current:	124,938	124,938	91,164	0	0%	83,774	27%	1.00	1.37
Cumulative:	374,815	374,815	270,495	0	0%	104,320	28%	1.00	1.39
	BAC	EAC	VAC in \$	VAC in %	TCPI to BAC	TCPI to EAC			
At Complete:	6,759,720	4,878,488	1,881,232	28%	0.98	1.39			
Explanation of Variance/Description of Problem:									
Impact:									
Corrective Action:									
Monthly Summary (to include technical causes of VARs, Impacts) and Corrective Action(s):									
Prepared by:		Date:		Approved by:		Date:			

# New DOD Integrated Program Management Data Report (IPMDR)

- IPMDR - New Data Item Description (DID) which will start being applied to contracts in early CY 2020 - replaces IPMR DID #81861B
  - Electronic data delivery except variance narratives
  - Deliver no later than 16<sup>th</sup> working day after monthly close
  - Discuss tailoring and incremental delivery with program office
  - Previously on ACAT 1 programs reported electronically by uploading to the EVM-CR but not all ACAT levels will report via the EVM-CR

## Objectives

- Encourage dialog with the program office
- Relevant data faster
- Improved visibility into project controls - CA, WP, EOC, Time Phased Forecast
- Improved cost and schedule integration
- Data for more comprehensive analysis like DCMA metrics

# DCMA Business Processes

DCMA EVMS business practices (BP):

- BP1 - Pre-Award EVM System Plan Review
- BP2 - Post Award Earned Value Management System Description - Initial and Changes
- BP3 - Contract Initiation Support
- BP4 - EVMS Surveillance
- BP5 - EVMS Review for Cause
- BP6 - Compliance Review Execution

# Sample Automated Metrics

Active Metrics - purpose is to show the current list of metrics that have been approved for use by the DCMA EVMS Center Configuration Control Board (CCB)														
Test Metric Count	Unique Test Metric ID	Business Practice (BP)	GL	New? (since JUL19 CCB)	Changed? (since JUL19 CCB)	Attribute ID	Current Metric Revisio	Test Metric Rev Date	Test Step	Test Metric Numerator (X)	Test Metric Denominator (Y)	Metric Threshold	Artifacts	Test Type
53	10A104a	BP3 & BP4	10		Y	10A1	v3.4	31-Aug-19	Are %Start-%Finish EVT's applied to incomplete WPs with two accounting periods of budget?	X =Count of incomplete WPs with %Start-%Finish EVT's with more than two accounting periods of budget	Y = Total count of incomplete WPs with %Start-%Finish EVT's	X/Y ≤ 5%	02, 13	A
54	10A105a	BP3 & BP4	10		Y	10A1	v3.4	31-Aug-19	Does Quantifiable Backup Data (QBD) substantiate in-progress tasks or WPs with an EVT of % Complete?	X = Count of % Complete EVT in-progress tasks or WPs sampled with a recorded percent complete that is not supported by a predetermined and objective QBD	Y = Total count of % Complete EVT in-progress tasks or WPs sampled	X/Y ≤ 5%	11, 13, 32	A/M
55	10A109a	BP4	10		Y	10A1	v3.4	31-Aug-19	Does each WP/PP have an assigned budget?	X = Count of WPs, PPs, and SLPPs with BAC ≤ 0 and   ACWPCUM   ≥ \$100	Y = Total count of WPs, PPs, and SLPPs	X/Y ≤ 5%	13	A
56	10A109b	BP3 & BP4	10		Y	10A1	v3.4	31-Aug-19	Does each WP/PP have an assigned budget?	X = Count of WPs, PPs, and SLPPs with BAC ≤ 0	Y = Total count of WPs, PPs, and SLPPs	X/Y ≤ 5%	13	A

## Guideline 10

- To the extent it is practicable to identify the authorized work in discrete work packages, establish budgets for this work in terms of dollars, hours, or other measurable units.
- Where the entire control account is not subdivided into work packages, identify the far term effort in larger planning packages for budget and scheduling purposes.

## Guideline 11

- Provide that the sum of all work package budgets plus planning package budgets within a control account equals the control account budget.

# Test Metric Specification

EVMS Test Metric Specification			
<b>1. Guideline No:</b> 10	<b>2. Unique Test Metric ID:</b> 10A102a	<b>3. Test Type:</b> Automated	<b>4. RESERVED</b>
<b>5. Attribute:</b> 10A1: Work packages have the following characteristics: <ul style="list-style-type: none"> <li>• Represent the scope of work at the level where work is performed or aggregated.</li> <li>• Are distinguishable from all other work packages.</li> <li>• Are assigned to a single organizational element.</li> <li>• Include scheduled start and completion dates; and as applicable, interim milestones, all of which are representative of technical accomplishment.</li> <li>• Have a time-phased budget or value expressed in terms of dollars, labor hours, or other measurable units that is substantiated in terms of supporting project plans.</li> <li>• Have durations that are limited to a span of time that is practical for the work scope. Longer-duration work packages have interim objective measures, such as points of technical achievement, to enable accurate performance assessment.</li> <li>• Are identified within the Integrated Master Schedule (IMS) and other supporting schedules.</li> </ul>			
<b>6. Test Step:</b> Are EVT's assigned to WPs?			
<b>7. Test Metric:</b> X = Count of incomplete WPs without an assigned EVT Y = Total count of incomplete WPs			<b>8. Metric Threshold:</b> $X/Y \leq 5\%$
<b>9. UN/CEFACT Required DEI(s)</b>			
<b>10. Data Elements Required:</b> 13 EV Cost Tool Data 13AP EVT 13BA WP/PP/SLPP UIDs			
<b>11. Assumptions:</b> <ol style="list-style-type: none"> <li>1. If BAC and BCWPCUM are within \$100 (or 1 hour), then WP is complete.</li> <li>2. PPs and SLPPs are not included.</li> </ol>			
<b>12. Instructions:</b> <ol style="list-style-type: none"> <li>1. Identify and count all incomplete WPs in the EV Cost tool; this is the denominator (Y) of the test metric.</li> <li>2. Identify and count any incomplete WPs without an assigned EVT; this is the numerator (X) of the test metric.</li> <li>3. Calculate the test metric (Block 7): X divided by Y.</li> <li>4. If the result is within the threshold (Block 8), the metric passes.</li> </ol>			
<b>13. Numerator Code</b>			
<b>14. Denominator Code</b>			

Details of each test metric is published so that there is a common understanding of the test and associated thresholds



# How can we bid on a contract requiring a compliant EVMS?

## Proposal & Contract Pre-Award

### DOD DFARS Clause 252.234-7001 - Notice of Earned Value Management System

- Requires an EVMS certified by a cognizant federal agency

**OR**

- Gap analysis of current EVMS capabilities vs. the EIA-748 - 32 guidelines
- Description of the EVM System being implemented
- EVMS Implementation Plan

# EVMS Implementation Steps

1. Identify a current contract to conduct an EVMS pilot. The pilot project should have a resource loaded project schedule and discrete contract deliverables
2. Identify program management personnel to support the pilot - PM, Project Scheduler, Project Controls Analyst
3. Implement Cobra using standard integration with the project schedule and Costpoint
4. Use Cobra to produce 2 monthly periods of IPMR Report
5. Develop an EVM System Description document which describes the system, business processes, and responsibilities
6. Utilize Acumen DECM compliance metrics to demonstrate system compliance or support a gap analysis
7. Develop corrective actions and EVMS implementation plan to close any gaps

# Metric Analysis in Acumen - Summary Report

		Ribbon Analysis																										
		Primary Formula Analysis																										
5	Ribbon	03A101a CA Pop (IMS vs WAD) V3.2 (03A101a)	03A101c CA BAC (WAD vs EV Tool) V3.1 (03A101c)	03A101e WP EV %C (IMS vs EV Tool) V3.1 (03A101e)	03A101f WP POP (IMS vs EV Tool) V3.2 (03A101f)	03A101g CA Pop (WAD vs EV Tool) V3.2 (03A101g)	03A101h CA OBS (IMS vs EV Tool) V3.2 (03A101h)	03A101i CA WBS (IMS vs EV Tool) V3.2 (03A101i)	05A101a CA Single OBS V3.1 (05A101a)	05A102a CA Single CAM V3.1 (05A102a)	06A103a CA Single WBS V3.1 (06A103a)	06A101a CA SLPP Have Tasks V3.1 (06A101a CA)	06A101a WP/PP Have Tasks V3.1 (06A101a WP)	06A203a Act SF Predecessors V3.1 (06A203a)	06A204a Act Open Starts or Finish V3.2 (06A204a)	06A205a Act Lags V3.1 (06A205a)	06A206a Act Leads V3.1 (06A206a)	06A208a Act Summary Logic V3.1 (06A208a)	06A209a Act Hard Constraints (OPP and P6) V3.1 (06A209a)	06A210a Act Driving LOE V3.2 (06A210a)	06A501a Act Baseline Dates V3.1 (06A501a)	08A101a SLPP PMB Alignment (IMS vs EV Tool) V3.1 (08A101a)	09A101a CA Start before WAD V3.1 (09A101a)	09A102a CA Actuals before WAD Start? V3.1 (09A102a)	10A102a WP Are EVT's assigned? V3.1 (10A102a)	10A104a WP % Start-%Finish EV's applied Correctly? V3.1 (10A104a)	10A109b WP/PP Have Budgets? V3.1 (10A109b WP)	10A303a PP All have duration? V3.1 (10A303a)
6	Test Project 1 - Oct 2019	10%	10%	5%	200	40	0	0	0	0	0	0	5	0	43	70	0	2	1	81	0	65	49	29	0	78	677	61
		Secondary Formula Analysis																										
12	Ribbon	03A101a CA Pop (IMS vs WAD) V3.2 (03A101a)	03A101c CA BAC (WAD vs EV Tool) V3.1 (03A101c)	03A101e WP EV %C (IMS vs EV Tool) V3.1 (03A101e)	03A101f WP POP (IMS vs EV Tool) V3.2 (03A101f)	03A101g CA Pop (WAD vs EV Tool) V3.2 (03A101g)	03A101h CA OBS (IMS vs EV Tool) V3.2 (03A101h)	03A101i CA WBS (IMS vs EV Tool) V3.2 (03A101i)	05A101a CA Single OBS V3.1 (05A101a)	05A102a CA Single CAM V3.1 (05A102a)	06A103a CA Single WBS V3.1 (06A103a)	06A101a CA SLPP Have Tasks V3.1 (06A101a CA)	06A101a WP/PP Have Tasks V3.1 (06A101a WP)	06A203a Act SF Predecessors V3.1 (06A203a)	06A204a Act Open Starts or Finish V3.2 (06A204a)	06A205a Act Lags V3.1 (06A205a)	06A206a Act Leads V3.1 (06A206a)	06A208a Act Summary Logic V3.1 (06A208a)	06A209a Act Hard Constraints (OPP and P6) V3.1 (06A209a)	06A210a Act Driving LOE V3.2 (06A210a)	06A501a Act Baseline Dates V3.1 (06A501a)	08A101a SLPP PMB Alignment (IMS vs EV Tool) V3.1 (08A101a)	09A101a CA Start before WAD V3.1 (09A101a)	09A102a CA Actuals before WAD Start? V3.1 (09A102a)	10A102a WP Are EVT's assigned? V3.1 (10A102a)	10A104a WP % Start-%Finish EV's applied Correctly? V3.1 (10A104a)	10A109b WP/PP Have Budgets? V3.1 (10A109b WP)	10A303a PP All have duration? V3.1 (10A303a)
13	Test Project 1 - Oct 2019	13%	100%	0%	27%	34%	0%	0%	0%	0%	0%	0%	0%	0%	3%	3%	0%	0%	0%	15%	0%	41%	30%	21%	0%	26%	16%	28%

# Detailed Metrics Analysis -WAD Integration

Project / Snapshot	Timeline												Ribbon Analyzer										
	1/2020	2/2020	3/2020	4/2020	5/2020	6/2020	7/2020	8/2020	9/2020	10/2020	11/2020	12/2020	CA PoP (IMS vs WAD)	CA BAC (WAD vs EV Tool)	WP EV % (IMS vs...)	WP POP (IMS vs EV Tool)	CA PoP (WAD vs EV Tool)	CA OBS (IMS vs EV Tool)	CA WBS (IMS vs EV Tool)	CA EVM (Sub vs Prime)	Forecast Dates (Sub vs Prim...)	Baseline Dates (Sub vs Prim...)	Score
SHIP Month 1													0 (0%)	8 (100%)	0 (0%)	0 (0%)	1 (13%)	0 (0%)	0 (0%)	0	0	0	100%

Control Account BAC in EV Tool does not match CA BAC in WADs - 100% of CAs do not match for each period in the project!

Review the Control Accounts by period and compare each BAC:  
 -Which system is correct?  
 -What is causing the discrepancy?  
 -Is it a user error or issue with the tool?  
 -How can it be corrected going forward?

CA BAC (WAD vs EV Tool) in 1/2020 (6)												
Id	Description	Project	Baseline Start	Baseline Finish	Start	End	Status	Bac				
1.1.1 / 1.ENG.CLARK	Key Plan	SHIP Month 1	1/2/2020	7/21/2020	1/1/2020	7/21/2020	InProgress	\$30,059				
1.1.3 / 1.ENG.CLARK	3D Modeling	SHIP Month 1	1/2/2020	8/18/2020	1/1/2020	8/18/2020	InProgress	\$195,572				
1.2.A.101 / 1.MFG.FRM1	Assemble Unit 101 wing unit	SHIP Month 1	1/2/2020	10/14/2020	1/1/2020	10/14/2020	InProgress	\$63,094				
1.2.A.102 / 1.MFG.FRM2	Assemble Unit 102 - innerbotto	SHIP Month 1	1/2/2020	11/11/2020	1/1/2020	11/11/2020	InProgress	\$63,094				
1.2.A.103 / 1.MFG.FRM2	Assemble Unit 103 - accommodat	SHIP Month 1	1/2/2020	12/11/2020	1/1/2020	12/11/2020	InProgress	\$63,095				
1.2.F.16 / 1.MFG.FRM3	Cost Group 16 Fab fittings	SHIP Month 1	1/2/2020	1/8/2020	1/1/2020	7/21/2020	InProgress	\$0				

# Detailed Metrics Analysis

In each period, there are between 1-6 WPs/PPs that do not have corresponding tasks in the schedule

WP/PP Have Tasks	6	3	3	3	3	4	3	3	3	2	1	0
Risk Mitigation...	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Act SF Pred...	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0
Act SS/FF P...	0 (0%)	0 (0%)	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (14%)	0 (0%)	0 (0%)	N/A
Act Open Starts...	6 (100%)	0 (0%)	0	0 (0%)	0 (0%)	1 (17%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	N/A
Act Lags	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0
Act Leads	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0
Act Summary Logic	0 (0%)	0	0	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (50%)	2 (67%)	0 (0%)	0 (0%)

WP/PP Have Tasks in 1/2020 (6)								
Control	Account Id	Id	Description	Project	Baseline Start	Baseline Finish	Start	Finish
	1.1.1 / 1.ENG.CLARK	1.1.1.1	Develop Hull Systems	SHIP Month 1	1/2/2020	3/27/2020	1/1/2020	3/2/2020
	1.1.3 / 1.ENG.CLARK	1.1.3.1	3D Modeling Zone 1	SHIP Month 1	1/2/2020	6/20/2020	1/1/2020	6/1/2020
	1.1.3 / 1.ENG.CLARK	1.1.3.2	3D Modeling Zone 2	SHIP Month 1	1/2/2020	8/18/2020	1/1/2020	8/1/2020
	1.2.A.101 / 1.MFG.FRM1	1.2.A.101.02	Assemble Steel	SHIP Month 1	1/2/2020	2/5/2020	1/1/2020	2/4/2020
	1.2.A.102 / 1.MFG.FRM1	1.2.A.102.02	Assemble Steel	SHIP Month 1	1/2/2020	2/5/2020	1/1/2020	2/4/2020
	1.2.A.103 / 1.MFG.FRM2	1.2.A.103.02	Assemble Steel	SHIP Month 1	1/2/2020	2/5/2020	1/1/2020	2/4/2020

Review each WP/PP, starting with the near term:

- Are the WPs/PPs in the EV tool or schedule correct?
- Are tasks coded correctly in the schedule?
- How can it be corrected going forward?

## What is the impact on your organization?

- License Cobra and Acumen solutions
- Implementation requires management commitment and will require approximately 3 months to accomplish
- Support of existing Program project scheduling and financial management resources
- Resource who will focus on the implementation and use of Cobra

# Sample Contract CDRL Requirements

CONTRACT DATA REQUIREMENTS LIST <i>(1 Data Item)</i>					Form Approved OMB No. 0704-0188		
The public reporting burden for this collection of information is estimated to average 110 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Department of Defense, Executive Services Directorate (0704-0188). Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. <b>Please do not return your form to the above organization. Send completed form to the Government Issuing Contracting Officer for the Contract/PR No. listed in Block E.</b>							
A. CONTRACT LINE ITEM NO. CLIN 008		B. EXHIBIT A		C. CATEGORY: TDP <input type="checkbox"/> TM <input type="checkbox"/> OTHER <input type="checkbox"/>			
D. SYSTEM/ITEM			E. CONTRACT/PR NO.		F. CONTRACTOR		
1. DATA ITEM NO. A008	2. TITLE OF DATA ITEM Integrated Program Management Report				3. SUBTITLE		
4. AUTHORITY <i>(Data Acquisition Document No.)</i> DI-MGMT-81861A/T			5. CONTRACT REFERENCE		6. REQUIRING OFFICE		
7. DD 250 REQ	9. DIST STATEMENT REQUIRED	10. FREQUENCY MONTHLY	12. DATE OF FIRST SUBMISSION SEE BLK 16		14. DISTRIBUTION		
8. APP CODE		11. AS OF DATE N/A	13. DATE OF SUBSEQUENT SUBMISSION SEE BLK 16		a. ADDRESSEE	b. COPIES	
						Draft	Final
						Reg	Repro



## Sample Contract CDRL Requirements (cont.)

Block 4: DI-MGMT-81861A is tailored as follows:

- All formats shall be submitted electronically in accordance with the DoD-approved XML schemas and guidelines located in the EVM Central Repository (EVM-CR). <http://dcarc.cade.osd.mil/EVM/Uncefact.aspx>.
- Block 12 - Date of First Submission- The first submission of Formats 1-6 are due 30 days after award of contract.
- Block 13 - Date of Subsequent Submission: Subsequent submission containing Formats 1-6 shall be provided within 10 business days of the end of the previous month.

## Sample Contract CDRL Requirements (cont.)

- Formats 1 through 4 instructions
- Format 5 instructions:
- The Variance analysis thresholds are:
  - \$50K and 10% for current period cost or schedule variances
  - \$100K and 10% for cumulative cost or schedule variances
  - \$250K and 5% for at-complete variances
- Format 6 instructions:
  - The IMS shall include all discrete work; subcontractors with EVM flow-down shall be incorporated with sufficient detail to develop a realistic critical path and provide insight into the scope of work being accomplished
- The Schedule Risk Assessment (SRA) shall be submitted in Format 5 and delivered 60 days prior to any IBR

# Benefits of implementing an EVMS Pilot and using the DECM Metrics

- Demonstrates commitment by implementing an EVMS rather than just providing a plan
- Demonstrates an understanding of the DECM and the EIA-748 guideline requirements
- EVM System description and system implementation plan prove your organization is prepared for the contract EVM reporting requirements
- Shows commitment to provide accurate, reliable, and timely project performance information
- Project management process improvements and enhanced project performance



## Next Steps

1. Complete the session survey in the mobile app.
2. Utilize the Post-Event Toolkit to share what you've learned.
3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

## Downloading Presentations?

- Available presentation PDFs are in the Insight Attendee Portal (Schedule Builder) and in the mobile app.
- Online and mobile app access to this year's presentations expires on March 1, 2020.