

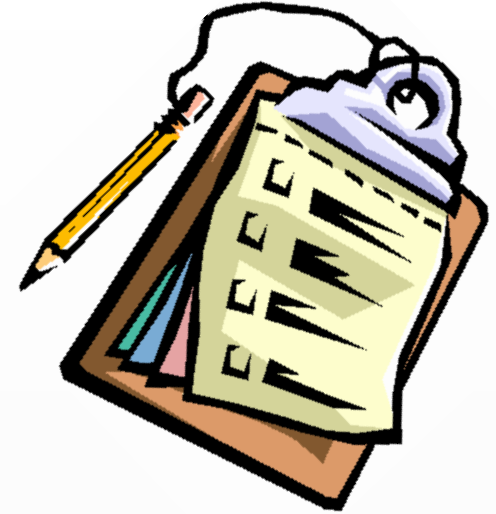


2017 EVM Practitioners' Forum

DOD Program EVM Analysis: Army Perspective, PARCA Expectations, and Process Improvements

Donnah Laster

Agenda



- Introduction
- Project Inception
- Learning Objectives
- EVM Analysts' 10 Step Monthly Process
- Lean Six Sigma/Black Belt Project
- Key Takeaways
- Q&A

Learning Objectives



How to plan
accordingly for
EVM
deliverables

What to do
when
contractor
deliverables hit
your door step

How you can
assist with the
development
of this process

Introduction

Donnah Laster

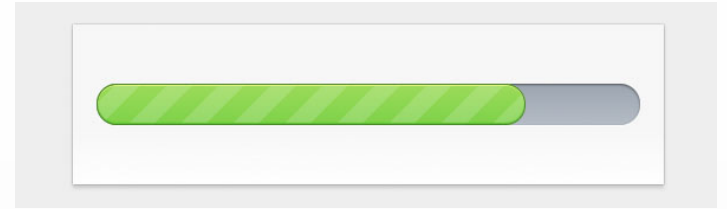
- TACOM Warren – 9 years
- Cost Research Analyst
 - Earned Value Management Analyst
 - Abrams, Lead
 - PIM, Bradley, KSA, Support
 - 5 IBRs
 - IBR Consultant, Abrams ECP1B
- Management Analyst
 - PEO GCS - Operations
 - CPI Lead (Continuous Process Improvement)



Project Inception

- EVM was simultaneously required on four different contracts.
- Four different analysts were performing monthly EVM analysis, briefing 4 different managers.
- Four managers were briefing 1 person in leadership.
- Due to inconsistencies in data layout and information leadership was receiving across programs, a standardized process was needed.
- All PEO EVM analysts' processes were taken into consideration to form one standardized process.

Project Progress



- PEO GCS Completed CPI (Continuous Process Improvement) Project
- OSD PARCA Acquisition Exchange Program – 3 months, Gordon Kranz Leadership
- Completed Define Phase of Lean Six Sigma Black Belt Project
 - Received PARCA & DAU Buy-in

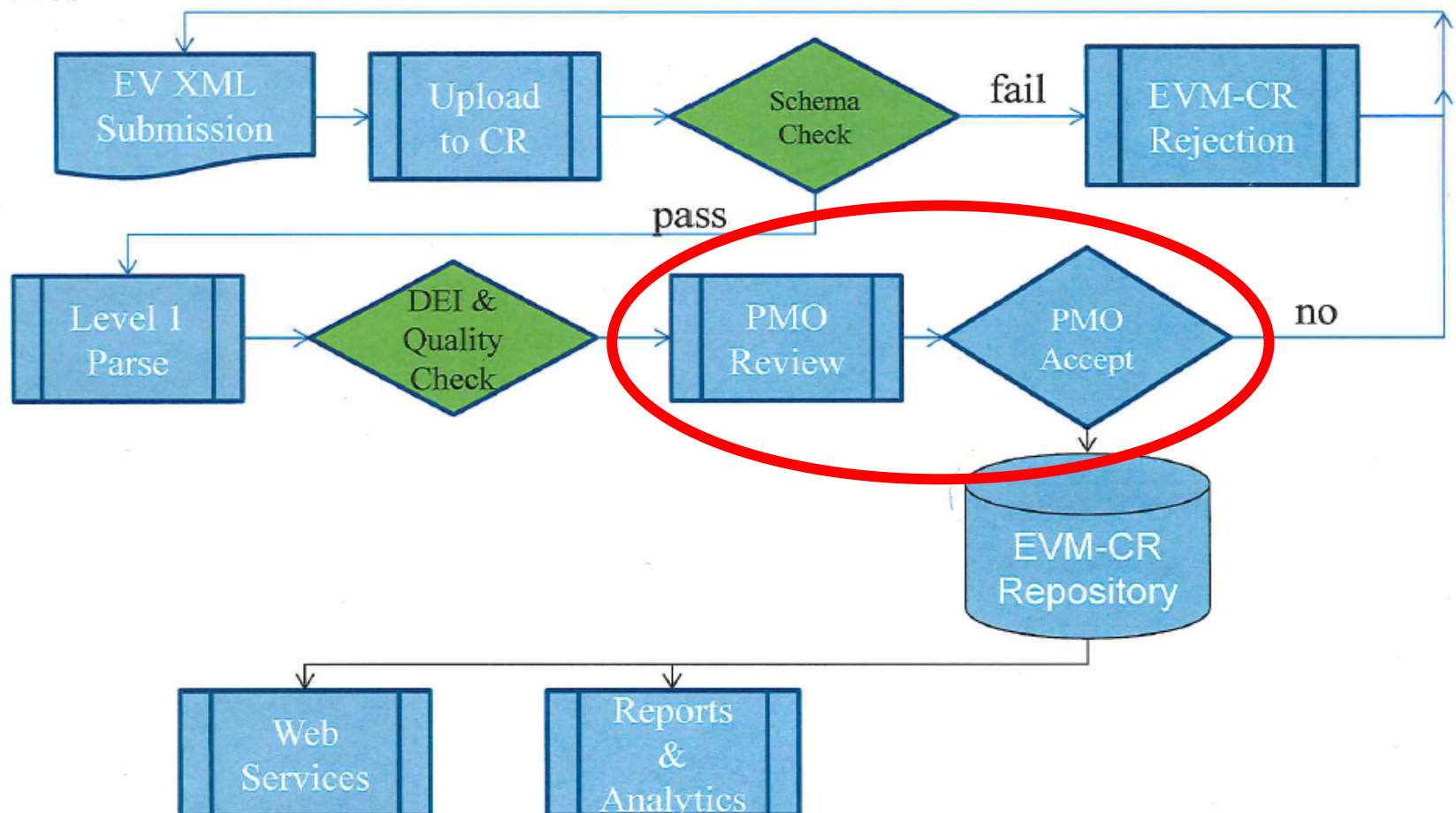
Lean Six Sigma Black Belt Project



- PowerSteering - LD28026
- Name: Earned Value Management Analysts' Monthly Process Guide
 - Define
 - **Measure**
 - Analyze
 - Improve
 - Control
- Co-Sponsor – OSD PARCA Office; Mr. John McGregor
- Goals
 - Complete DOD-wide Lean Six Sigma Black Belt project
 - Pocket Guide Book
 - Electronic Tracker Sheet
 - Quick Guide Page
- Estimated Completion - Mar 2018

Where is this process?

► IPMR Schema/DEI Compliance and Data Quality Checks Built Into Business Process



Step by Step Process (Overview)

<i>EVM Analysts' Monthly Process Tracker</i>													
	Program/Contract Name:												
	PM:												
	Lead EVM Analyst:												
	DCMA Analyst:												
	Contractor:												
Steps	ACTION											Jan	Feb
1	Schedule Meetings												
	Schedule CPR Meeting with DCMA												
	Schedule CPR Meeting with Contractor												
	Schedule GCAM Meeting(s) (suggested at least once every quarter)												
	Schedule PM/Leadership Briefing												
	Receipt of Deliverables:												
2	Store and Load Contractor Deliverables (public & personal folders)												
	CFSR (Quarterly)												
	CPR												
	CSDR												
	CWBS												
	IMS/IMP												
	Load wlnsight												
3	Review Deliverable data												
4	Make EVM Dashboard												
5	Write EVM Analysis												
6	Lead EVM Meetings												
	DCMA												
	Contractor												
	G-CAM (suggested at least once every quarter)												
	PM/Leadership												
7	Edit dashboard and analysis based on meetings and guidance from leadership												
8	Concure/Non-Concure with all EVM deliverables (10 days after delivery)												
9	Send all developed items (analysis, dashboard, monthly process tracker, etc., to EVM Team												
10	Save updated version of the EVM Monthly Process Tracker to folders												

Step by Step Process (Step 1)

Schedule Meetings

Steps	ACTION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Schedule Meetings												
	Schedule CPR Meeting with DCMA												
	Schedule CPR Meeting with Contractor												
	Schedule GCAM Meeting(s) (suggested at least once every quarter)												
	Schedule PM/Leadership Briefing												
	Receipt of Deliverables:												

- All necessary people are invited
- Scheduling meetings 1 month in advance to allow for proper planning
- Schedule Meetings with:
 - DCMA
 - Contractor
 - Government Contract Account Managers (G-CAMS)
 - Brief Leadership
- Receipt of Deliverables
 - This is not an action, but a placeholder.
 - Different contracts have different delivery dates.
 - All meeting notices should be set by the time deliverables are received.

Step by Step Process (Step 2)

Electronic Filing

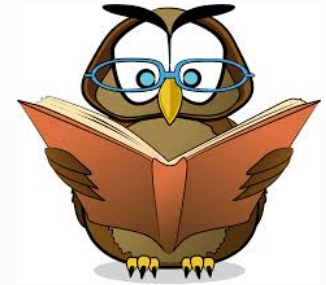


Steps	ACTION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Store and Load Contractor Deliverables (public & personal folders)												
	CFSR (Quarterly)												
	CPR												
	CSDR												
	CWBS												
	IMS/IMP												
	Load wlnsight												

- Electronically file all deliverables
 - File in a public place like a portal or T-drive
 - File in a personal folder as well
- Electronically filing as soon as deliverables are issued, allows everyone on the program access to the documents.
- Filing in a personal folder protects the files just in case of a downfall/closing of the public folders.
- Load wlnsight - Loading wlnsight files into the system at step 2 allows the analyst to view all the numeric data and come up with an independent variance analysis before viewing the analysis of the contractor.

Step by Step Process (Step 3)

Review Deliverables (CPR/IPMR, CFSR, CWBS, etc.)



- Print out deliverables
- Read each deliverable in its entirety, for comprehension and contract compliance.
 - Highlight question/trouble areas
- Address these questions/concerns in the upcoming meetings with DCMA, the contractor, G-CAMS and management.

Step by Step Process (Step 4)

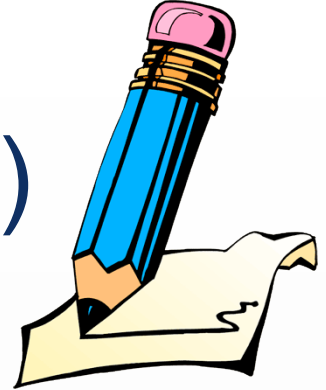
- Dashboard Chart

- Complete/submit first before any upcoming reviews/program meetings, etc.
- Distribute to those who want a “heads up” or need to make quick decisions
- Include dashboard in overall analysis

Contract Name EVM Dashboard						FOUO	
						AUG 2017 (JUL 2017 data) (\$ in K)	
Contractor:		Contract:					
Performance Graph	Contract (\$K)	Negotiated	Neg. +AUW	(\$K)	Baseline	Efficiency Graph	
	Contract Cost			BAC			
	Fee			M/R			
	Price			TAB			
	Estimates at Complete (\$K) PMB			Progress			
	URE (KTR)			Spent			
	EAC (GOVT)			Scheduled			
	VAC (GOVT)			Performed			
	CPI			SPI			
	BCWS		BCWP		ACWP		
Variance Graph	Estimate at Completion (EAC)*						
	Scenario	Factor	Result	EAC	VAC	Management Reserve Graph	
	Best Case	$CPI \cdot 80 + SPI \cdot 20$					
	Most Likely	CPI					
	Worst Case	$CPI \cdot SPI$					
Burn Rate Graph							
						Staffing Graph	

Step by Step Process (Step 5)

Write EVM Analysis



- Develop a standard document for monthly analysis.
- Agree to include the same layout, charts, information, etc. as other programs in your PM/PEO.
- After agreeing with your PM/PEO analysts, only tailor analysis according to management requests.
- EVM Analysis Report
 - Contract Information / Written Summary
 - Charts
 - Variance Analysis

Step by Step Process (Step 5)

Write EVM Analysis . . . Continued

Analysis Report – Contract Information / Written Summary



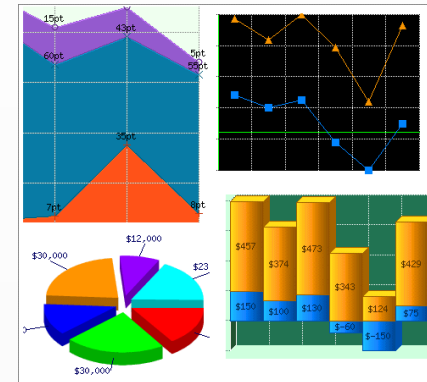
- Include
 - Names / leadership positions
 - Contract information (found on format 1 of the CPR/IPMR)
 - The accounting period
 - Top 5 cost and schedule drivers (current and cumulative)
 - Recent contract news
 - Upcoming reviews / meetings / contract milestones

Step by Step Process (Step 5)

Write EVM Analysis . . . Continued

Analysis Report - Charts

- 6 Period Summary
- CPI / SPI Variance Trend
- CAM/G-CAM Matrix Chart
 - Made in excel
 - Organized by Cam accounts for their convenience
 - Includes all relevant data
- Charts/graphs used are dependent upon program data/management requests



Step by Step Process (Step 5)

Write EVM Analysis . . . Continued

Analysis Report – Variance Analysis



- Provide verbal explanation for the top 5 current cost and schedule control accounts.
 - This information is provided by the contractor in format 5 of the CPR
 - Include analysis from corresponding G-CAM if it differs from that of the CAM
 - Include program impact and mitigation plan and whether or not the G-CAM believes it is feasible

Step by Step Process (Step 6)



Lead EVM Meetings / Brief Leadership

Steps	ACTION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
6	Lead EVM Meetings												
	DCMA												
	Contractor												
	G-CAM (suggested at least once every quarter)												
	PM/Leadership												

- **DCMA**
 - Present analysis to DCMA POC and review DCMA analysis in person.
 - Have an informal discussion about current deliverables and the ongoing issues/concerns/improvements.
 - Edit/add to analysis accordingly based on DCMA insight.
- **Contractor**
 - Contractor EVM POC and contractor CAMs should be present
 - Contractor will do a formal review of the CPR
 - In format 5, each CAM will talk through their section and explain any issues/risk/variances
- **G-CAMS**
 - Monthly or Quarterly meetings - Depends on the severity of G-CAMS' input to management due to quick changes/risks in the program
 - CAMs should share budget, schedule, and program risk concerns with the analyst
 - CAM should include contractor's program impact and mitigation plan
 - CAMs should share budget/schedule/risk concerns with the analyst
 - CAM should also include contractor's program impact and mitigation plan
- **Leadership/Management**
 - Make changes edits/additions to analysis based on previous meetings before briefing management
 - Provide management with the analysis as soon as possible before the meeting so they have time to review
 - Tailor brief to management by requests.
 - Include Government EAC and Analyst suggestions about path forward.

Step by Step Process (Step 7)

Edit Analysis



- Edit Dashboard and Analysis based on previous meetings
 - May want to include varying analysis from DCMA
 - Contractor may have initially reported something incorrect that should be changed



Step by Step Process (Step 8)

Accept/Reject Deliverables

- Based on the contractor providing the contractually agreed upon reports (on time, complete, and correct) chose to accept or reject deliverables.
 - Accepting/rejection should be done in the EVM Repository system as well as any internal systems.
 - Accept/Reject is required no later than 10 business days after receipt of deliverables.
 - It is important to PARCA that these acceptations/rejections happen manually
 - As courtesy to the contractor and building healthy working relationships, it is good practice to inform the contractor first if any deliverables will be rejected
 - Contractor may be able to fix the issue first before a rejection is necessary.

Step by Step Process (Step 9)

Distribute Analysis



- Distribute Analysis, Monthly Process Tracker, Meeting Minutes / action item documents to entire program team.
 - Distribution should be done via email and electronic filing
- Ideal timeframe from receipt of deliverables to distribution of analysis is 10 business days.

Step by Step Process (Step 10)

Save Data



- Save all data to public drives
 - It is convenient for the team if the EV analyst updates his/her tracker as they are working during those 10 days, so team members know where they are in the process.
 - Be sure after everything is complete, to check the list again, then save it publically, and to a personal file as well.

Key Takeaways

- Plan ahead every month
- Review Contractor Data
- Meet with key people
- Be on one accord with contract leads in your office
- Manually concur in EVM Repository within 10 business days of receipt of deliverables
- Keep a look out for the EVM Analysts' Monthly Process Guide (DUA / PARCA)

Suggestions for Me?

Want to join our EVM Black Belt Project Team?

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- Office Phone: 586.282.8304





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