



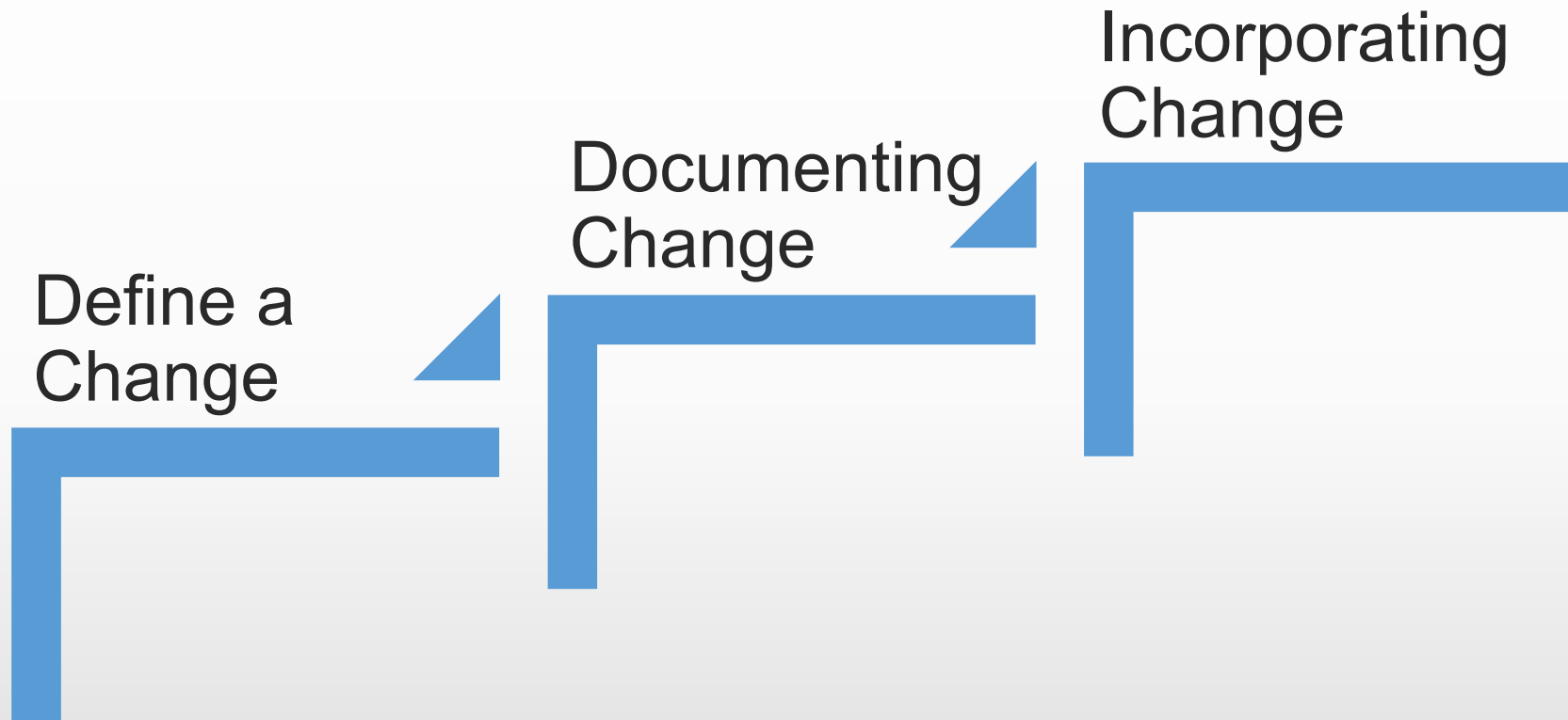
Earned Value Management Practitioners Forum 2018

Management Change in the Project Schedule

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Learning Objectives



What is Change?

In regards to the project schedule, *change* is anything to makes changes to time or cost of your schedule.



Whether is solely a schedule change or contains cost, the process is called a Budget Change Request (BCR).

*There are technical changes as well, however, those will not be covered today.

Project Schedule Change

Step 1: Identify the Need for a Change

Planning for the Change

CAM: “Matt, we need to change the schedule. I’m running behind and need to adjust my plan.”

Not Allowed

Matt: “I’m sorry, but it sounds like you’re running behind because of performance. In order to adjust your plan, a scope change is required.”

Planning for the Change

CAM: “Matt, we need to change the schedule. We received contractual direction from our customer and need to adjust my plan.”

Allowed

Matt: “Great. Let’s sit down and see what we need to do.”

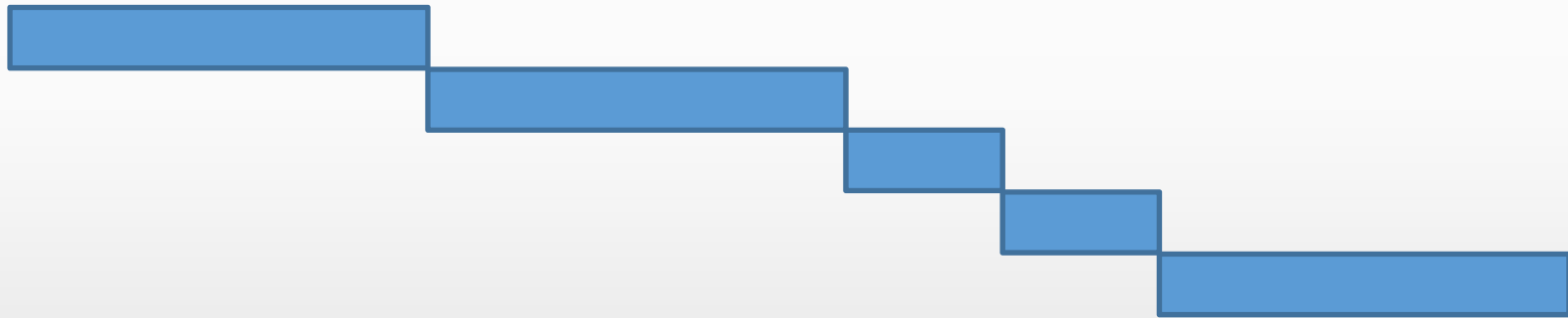
Project Schedule Change

Step 1: Identify the Need for a Change

Step 2: Change Analysis

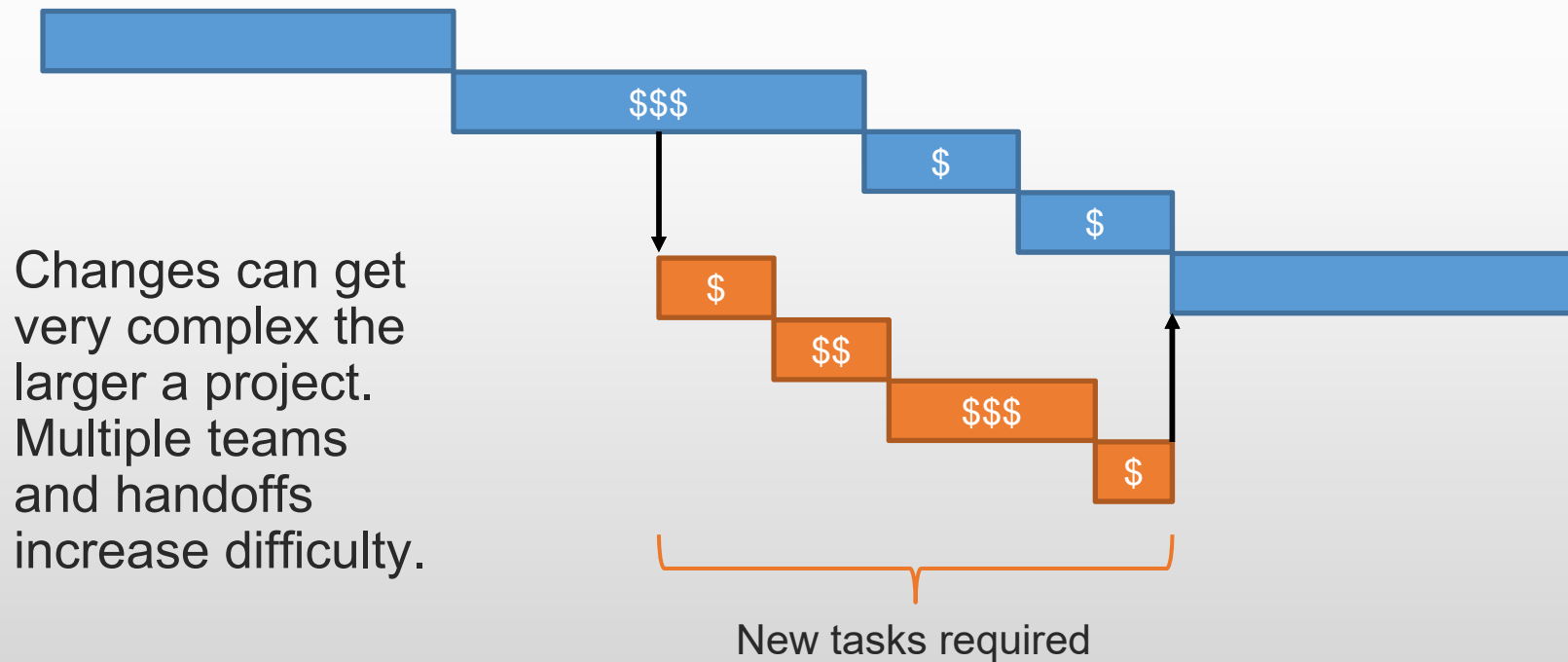
Change Analysis

Start with your current baseline plan



Change Analysis

Identify where the change occurs



Project Schedule Change

Step 1: Identify the Need for a Change

Step 2: Change Analysis

Step 3: Documentation

Documentation

Since there will be change to the project baseline, a change package will need to be created and presented to leadership.

The package should include:

- Control Accounts/Work Packages Affected
- Reason for the Change
- Summary of the Change
- Total Dollars of Change
- Schedule Impacts of Change

Documentation

- Every program will have a slightly different package format. However, the underlying details should be the same.

I.04.05 DESIGN AIRCRAFT FUSELAGE

- **CA Scope:** Engineering design of Aircraft Fuselage
- **Reason for Change:** Detail plan planning package for 2Q 2018
- **Change:** Reduce planning package by 54,454. Increase design work package 54,454 for detail planned scope. Net Zero change at Control Account.
- **Total Budget After Change:** \$139,755.90
 - Planning Package: \$0.00
 - Detail Planned: \$139,755.90
- **MR:** \$20,000
- **Schedule Margin:** 20 days

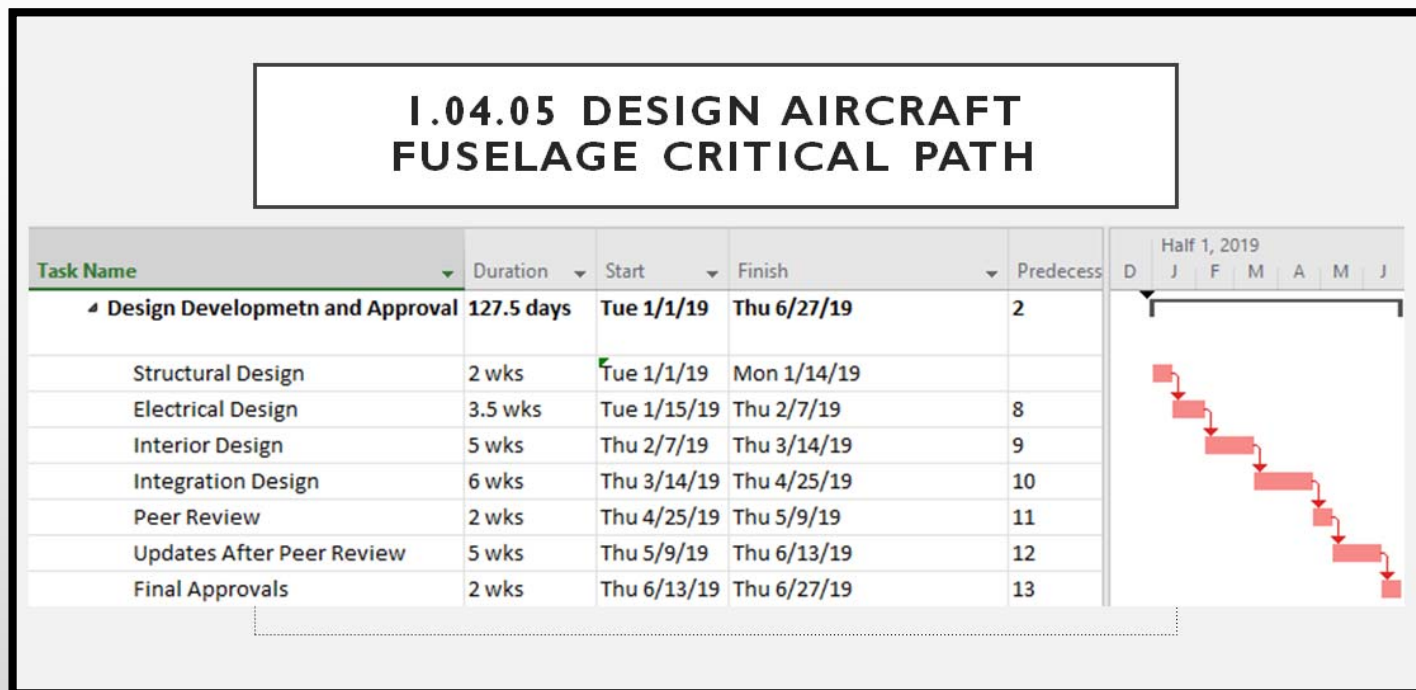
Documentation

- Budget Was/Now(To-Be)

			Jan	Feb	March	April	May	June	Grand Total
1.04.05 DESIGN AIRCRAFT FUSELAGE									
Budget Before BCR									
Control Account	Work Package	Cost Set	Jan	Feb	March	April	May	June	Grand Total
1.04.05: Design Aircraft Fuselage	01 - Planning Package	Budget				56,454.00			56,454.00
	02 - Detail Work Scope	Budget	37,266.90	24,035.00	22,000.00				83,301.90
1.04.05: Design Aircraft Fuselage Total			37,266.90	24,035.00	22,000.00	56,454.00	-	-	139,755.90
BCR									
Control Account	Work Package	Cost Set	Jan	Feb	March	April	May	June	Grand Total
1.04.05: Design Aircraft Fuselage	01 - Planning Package	BCR 03 01				(31,887.00)	22,057.00	9,830.00	-
1.04.05: Design Aircraft Fuselage Total			-	-	-	(31,887.00)	22,057.00	9,830.00	-
Budget After BCR									
Control Account	Work Package	Cost Set	Jan	Feb	March	April	May	June	Grand Total
1.04.05: Design Aircraft Fuselage	01 - Planning Package	Budget				24,567.00	22,057.00	9,830.00	-
	02 - Detail Work Scope	Budget	37,266.90	24,035.00	22,000.00				139,755.90
1.04.05: Design Aircraft Fuselage Total			37,266.90	24,035.00	22,000.00	24,567.00	22,057.00	9,830.00	139,755.90

Documentation

- Schedule Was/Now(To-Be)



Project Schedule Change

Step 1: Identify the Need for a Change

Step 2: Change Analysis

Step 3: Documentation

Step 4: Approvals

Approvals

Once your Change Package is ready, submit it to program leadership for review.

Depending on the size of your program, this can be a simple meeting or a formal review board.



What happens if it doesn't get approved?

Planning for the Change

Step 1: Identify the Need for a Change

Step 2: Change Analysis

Step 3: Documentation

Step 4: Approvals

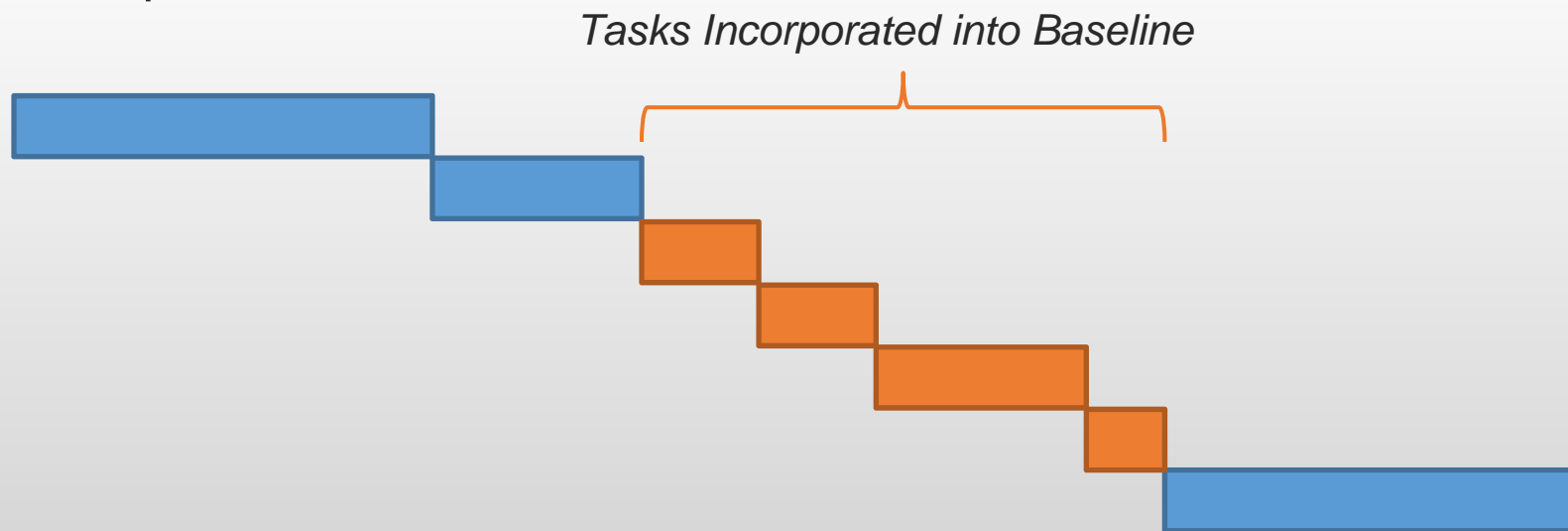
Step 5: Incorporation

Incorporation

Simple changes should be easily incorporated.

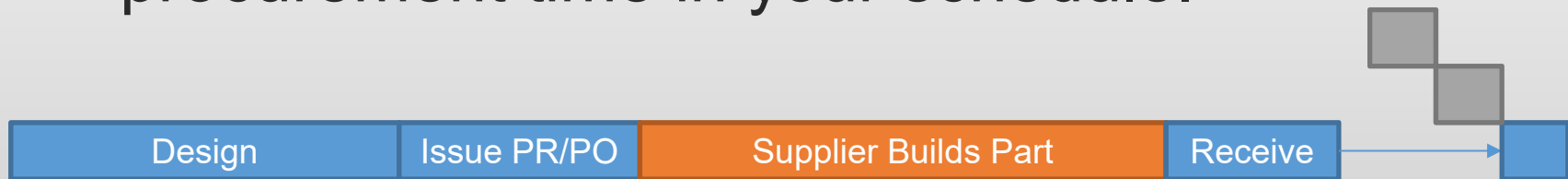
Larger changes may take longer to get incorporated because of the complexity involved.

Both types of changes should be verified for accuracy after completed.



Management Project Change

- Based on my experience, procurement tasks always come up for change.
- Why? In order to baseline a schedule, assumptions have to be made. These include lead times for items never made before. Odds are that once a contract is negotiated, you'll have to adjust the procurement time in your schedule.



Key Takeaways

- What is the best practice for managing change in the project schedule?
 - Clearly Identifying Changes versus Performance
 - Creating an impact analysis
- Tips & Tricks
 - Always ask questions when requested to do a change: What is driving this scope change?