


Earned Value Management; Analysts' Monthly Process

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Agenda



- ▶ Introduction
- ▶ Process Inception
- ▶ Step by Step Process (12 Steps)
- ▶ Q&A
 - Feel free to ask questions during the presentation

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Introduction



- ▶ Donnah Laster
 - TACOM Warren/Detroit Arsenal
 - PEO GCS
- ▶ BA in Mathematics, English minor
 - Marygrove College, Detroit, MI
- ▶ Masters in Business Administration (MBA)
 - Wayne State University, Detroit, MI
- ▶ Cost Research Analyst
 - Earned Value Management Analyst, 6 years
 - Abrams, Lead
 - PIM, Bradley, KSA - Support
 - 5 IBRs

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Process Inception



- ▶ EVM was simultaneously required on four different programs in the PEO.
- ▶ Four different analyst 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 developed.
- ▶ All EVM analysts' processes were taken into consideration to form one standardized process.

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Step by Step Process (Overview)

Earned Value Management Monthly Process												
Program: ABCD												
PM: John Doe												
ACTION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1 Schedule Meetings												
DCMA Meeting												
Contractor CPR Meeting												
GCAM Meeting (once every quarter)												
Management Briefing												
2 Deliverable due date: 1st of every month												
3 Electronic Filing - T-drive and personal file												
4 Load winsight												
5 Review all Deliverables												
6 Write EVM Analysis (Including dashboard)												
7 Meet with DCMA												
8 Meet w/ contractor												
9 Meet with GC&MS												
10 Brief Management												
11 Accept/Reject all deliverables - internal system and DCARC												
12 Distribute Analysis to Team												

Step by Step Process (Step 1)

Schedule Meetings

ACTION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Schedule meeting Dates												
DCMA Meeting												
GDLS CPR Meeting												
GCAM Meeting (once every quarter)												
Management Briefing												



•Make sure all necessary attendees are invited.

•Scheduling meetings months in advance allows attendees to properly plan.

Step by Step Process (Step 2)

Receipt of Deliverables

▶ Receipt of Deliverables

- This is not an action, but a placeholder for an LOE effort.
- Different contracts have different delivery dates.
- All meeting notices (from previous step) should be set by the time deliverables are received.



Step by Step Process (Step 3)

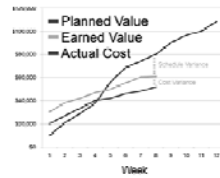
Electronic Filing

- ▶ 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.



Step by Step Process (Step 4) Load wInsight

- ▶ Loading wInsight files into the system at step 4 allows the analyst to view all the numeric data and come up with an independent variance analysis before viewing the analysis of the contractor.



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Step by Step Process (Step 5) Review Deliverables (CPR/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, and management.



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Step by Step Process (Step 6) Write EVM Analysis

- ▶ Develop a standard document for writing the monthly analysis.
- ▶ Agree to include all the same charts, information, etc.
- ▶ Only tailor the analysis according to management requests.



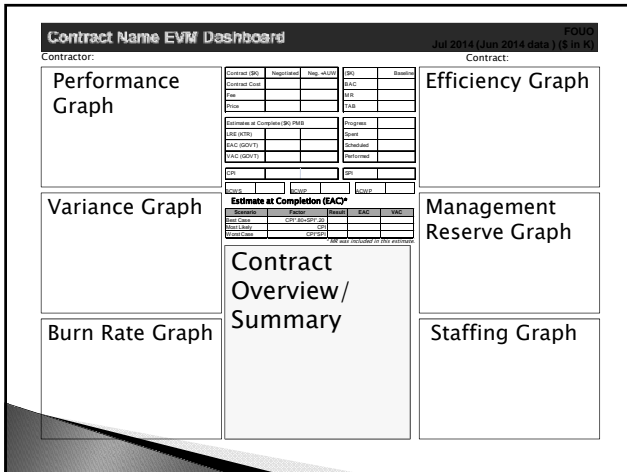
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Step by Step Process (Step 6 continued) Writing EVM Analysis (Agenda)

- ▶ Dashboard Chart (Step 6a)
 - Complete/submit first for any upcoming reviews/program meetings, etc.
 - Include dashboard in overall analysis
- ▶ Summary
- ▶ Charts
- ▶ Variance Analysis




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Step by Step Process (Step 6b) Summary Information

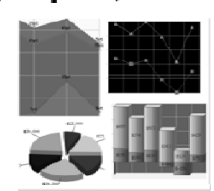
- Include
 - Names/positions of Leadership/management
 - Contract information found on format 1 of the CPR
 - The accounting period
 - Top 5 cost and schedule drivers (current and cumulative)
 - Recent contract news
 - Upcoming events/reviews/meetings/contract milestones



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Step by Step Process (Step 6c) Charts/Graphs


- 6 Period Summary
- CPI Variance Trend
- 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



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Step by Step Process (Step 6d) 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



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Step by Step Process (Step 7) Meet with 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.



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Step by Step Process (Step 8) Meet with the Contractor



- ▶ Meet with 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
 - CAMs should be able to answer any questions from EVM analyst

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Step by Step Process (Step 9) Meet with Government/G-CAMs

- ▶ Monthly or Quarterly meetings
 - Depends on the severity of the G-CAM's input to management due to quick changes/risks in the program
 - This decision should be made by management
- ▶ One on one or Group Meetings
 - Either way, each CAM should share budget/schedule/risk concerns with the analyst
 - CAM should also include contractor's program impact and mitigation plan



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Step by Step Process (Step 10) Brief 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.

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Step by Step Process (Step 11) Accept/Reject Deliverables



- ▶ Based on meetings and briefings, chose to accept/reject deliverables
 - Accepting/rejection should be done in the DCARC system as well as any internal systems.
 - 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.

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Step by Step Process (Step 12) Distribute Analysis

- ▶ Distribute Analysis and any 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 should be no longer than 10 business days.



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Q&A



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