

EVMS Training Snippet Library:
Contract Performance Report / Integrated Program
Management Report: FPD Quick Check



Office of Acquisition and Project Management (APM) MA-60
U. S. Department of Energy
July 2014





- **Monthly CPR / IPMR review of EVM data is important**
- **Approach can be:**
 - Risk-based
 - Defined process based on PARS II Analysis reports
 - For example, monthly assessments as described in OAPM's EVMS and Project Analysis Standard Operating Procedure
 - In-depth reviews such as EVMS Surveillance process
 - See OAPM's EVMS Surveillance Standard Operating Procedure
- **What if you are a Federal Project Director and want to get a feel for how things are going in a short amount of time?**
 - FPD Quick Check





Formats 1 – 4: Header Checks

1. CONTRACTOR		2. CONTRACT			3. PROJECT		
a. NAME		a. NAME			a. NAME		
b. LOCATION (Address and ZIP Code)		b. NUMBER			b. PHASE		
		c. TYPE	d. SHARE RATIO		c. EVMS ACCEPTANCE NO YES (YYYYMMDD)		
5. CONTRACT DATA							
a. QTY	b. NEGOTIATED COST	c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	d. TARGET PROFIT / FEE	e. TARGET PRICE	f. ESTIMATED PRICE	g. CONTRACT PRICE	h. ESTIMATED CONTRACT CEILING

Review the header information, blocks 1 – 5.
 Are entries correct?
 Are they consistent between Formats?





Format 1 – EAC Checks

Is block 6.c. Most Likely EAC the same as the Column 15 EAC Total line?
If not, look for explanation in Format 5.

6. ESTIMATED COST AT COMPLETION																
	MANAGEMENT ESTIMATE AT COMPLETION (1)			CONTRACT BUDGET BASE (2)												
a. BEST CASE																
b. WORST CASE																
c. MOST LIKELY																
8. PERFORMANCE DATA																
ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION		
	BUDGETED COST		ACTUAL COST	VARIANCE		BUDGETED COST		ACTUAL COST	VARIANCE		COST VARIANCE (12a)	SCHEDULE VARIANCE (12b)	BUDGET (13)	BUDGETED (14)	ESTIMATED (15)	VARIANCE (16)
	WORK SCHEDULED (2)	WORK PERFORMED (3)	WORK PERFORMED (4)	SCHEDULE (5)	COST (6)	WORK SCHEDULED (7)	WORK PERFORMED (8)	WORK PERFORMED (9)	SCHEDULE (10)	COST (11)						
a. WORK BREAKDOWN STRUCTURE ELEMENT																
b. COST OF MONEY																
c. GENERAL AND ADMINISTRATIVE *																
d. UNDISTRIBUTED BUDGET																
e. SUB TOTAL (Performance Measurement Baseline)																
f. MANAGEMENT RESERVE																
g. TOTAL																
9. RECONCILIATION TO CONTRACT BUDGET BASE																
a. VARIANCE ADJUSTMENT																
b. TOTAL CONTRACT VARIANCE																



Format 1 – Retroactive Change Check



8. PERFORMANCE DATA					
ITEM (1)	CURRENT PERIOD				
	BUDGETED COST		ACTUAL COST WORK PERFORMED (4)	VARIANCE	
	WORK SCHEDULED (2)	WORK PERFORMED (3)		SCHEDULE (5)	COST (6)
a. WORK BREAKDOWN STRUCTURE ELEMENT					

Are there negative values in the current month for Budgeted Cost for Work Scheduled, Budgeted Cost for Work Performance, or Actual Cost of Work Performance?

If so, investigate the reason for the retroactive change.

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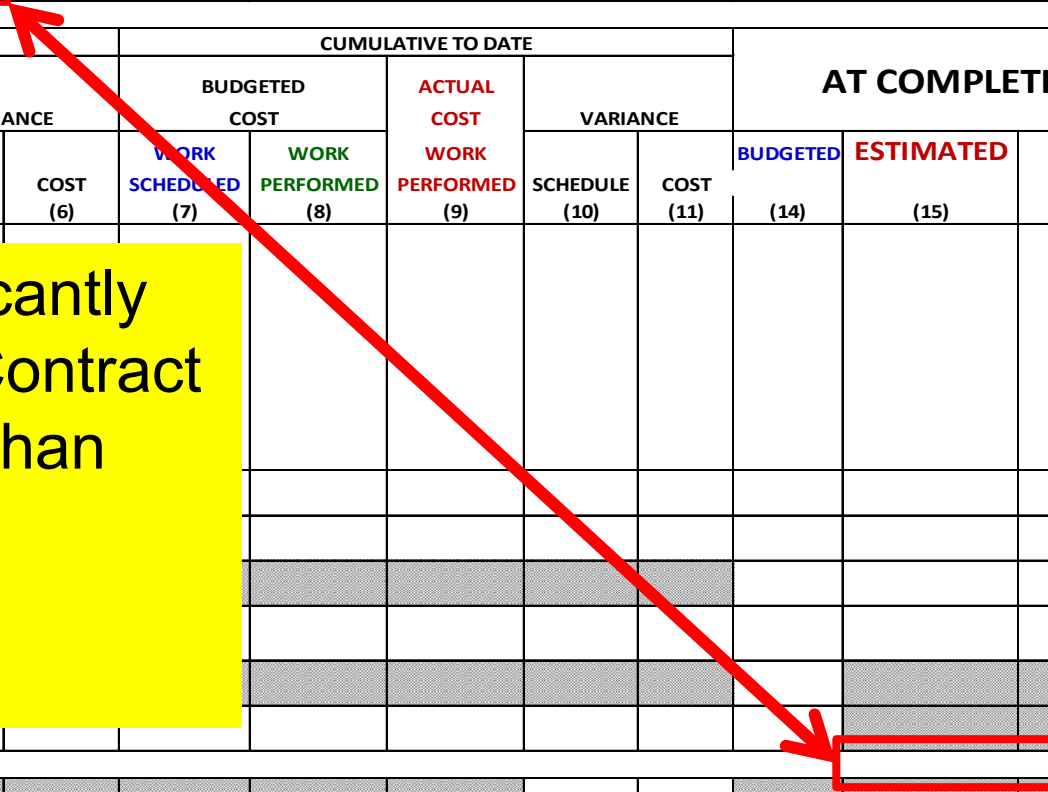




Format 1 – Potential OTB Indicator

6. ESTIMATED COST AT COMPLETION											7. AUTHORIZED CONTRACTOR REPRESENTATIVE			
MANAGEMENT ESTIMATE AT COMPLETION (1)		<div style="border: 2px solid red; padding: 5px; text-align: center;"> CONTRACT BUDGET BASE (2) </div>			VARIANCE (3)		a. NAME (Last, First, Middle Initial)							
a. BEST CASE					c. SIGNATURE		d. DATE SIGNED (YYYYMMDD)							
b. WORST CASE														
c. MOST LIKELY														
8. PERFORMANCE DATA														
ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					AT COMPLETION			
	BUDGETED COST		ACTUAL COST WORK PERFORMED (4)	VARIANCE		BUDGETED COST		ACTUAL COST WORK PERFORMED (9)	VARIANCE		BUDGETED (14)	ESTIMATED (15)	VARIANCE (16)	
	WORK SCHEDULED (2)	WORK PERFORMED (3)		SCHEDULE (5)	COST (6)	WORK SCHEDULED (7)	WORK PERFORMED (8)		SCHEDULE (10)	COST (11)				
a. WORK BREAKDOWN STRUCTURE														
b. C														
c. G														
d. U														
e. S														
f. M														
g. TOTAL														
9. RECONCILIATION TO CONTRACT BUDGET BASE														
a. VARIANCE ADJUSTMENT														
b. TOTAL CONTRACT VARIANCE														

Is the Column 15 EAC significantly greater than the Block 6.(2) Contract Budget Base (typically more than 20%)?
 If so, consider OTB.



Format 1 – Accuracy of OTB Reporting



5. CONTRACT DATA										i. DATE OF OTB/OTS (YYYYMMDD)																							
a. QUANTITY	b. NEGOTIATED COST	c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	d. TARGET PROFIT / FEE	e. TARGET PRICE	f. ESTIMATED PRICE	g. CONTRACT CEILING	h. ESTIMATED CONTRACT CEILING																										
6. ESTIMATED COST AT COMPLETION					7. AUTHORIZED CONTRACTOR REPRESENTATIVE																												
MANAGEMENT ESTIMATE			CONTRACT BUDGET	VARIANCE	a. NAME (Last, First, Middle Initial)			b. TITLE																									
a. B	Is there an OTB on this project?										d. DATE SIGNED (YYYYMMDD)																						
b. W	If so, is it correctly reported in Blocks 5.i, Block 8, Columns (12a), (12b), and (13), and Block 9.a. and b?																																
c. M	If not, question the contractor.																																
8. P																																	
										REPROGRAMMING ADJUSTMENTS			AT COMPLETION																				
										COST VARIANCE			SCHEDULE VARIANCE			BUDGET																	
										SCHEDULE (10)			COST (11)			COST VARIANCE (12a)			SCHEDULE VARIANCE (12b)			BUDGET (13)			BUDGETED (14)			ESTIMATED (15)			VARIANCE (16)		
a. W	ELEMENT																																
b. COST OF MONEY																																	
c. GENERAL AND ADMINISTRATIVE *																																	
d. UNDISTRIBUTED BUDGET																																	
e. SUB TOTAL (Performance Measurement Baseline)																																	
f. MANAGEMENT RESERVE																																	
g. TOTAL																																	
9. RECONCILIATION TO CONTRACT BUDGET BASE																																	
a. VARIANCE ADJUSTMENT																																	
b. TOTAL CONTRACT VARIANCE																																	



Format 1, 2, & 3 - MR Value Agreement



8. PERFORMANCE DATA																
ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION		
	BUDGETED COST		ACTUAL COST	VARIANCE		BUDGETED COST		ACTUAL COST	VARIANCE		COST VARIANCE (12a)	SCHEDULE VARIANCE (12b)	BUDGET (13)	BUDGETED	ESTIMATED	VARIANCE
	WORK SCHEDULED (2)	WORK PERFORMED (3)	WORK PERFORMED (4)	SCHEDULE (5)	COST (6)	WORK SCHEDULED (7)	WORK PERFORMED (8)	WORK PERFORMED (9)	SCHEDULE (10)	COST (11)				(14)	(15)	(16)
a. WORK BREAKDOWN STRUCTURE ELEMENT																
b. COST OF MONEY																
c. GENERAL AND ADMINISTRATIVE *																
d. UNDISTRIBUTED BUDGET																
e. SUB TOTAL (Performance Measurement Baseline)																
f. MANAGEMENT RESERVE																

Identify Format 1 Column 14 of Block 8.f. MR value (as shown above).

Does it agree with Format 2 Column 14 of Block 5.f?

Does it agree with Format 3 Column 16 of Block 7?

Note: Locations of MR value on Formats 2 and 3 are in a similar location as shown.



Format 3 – OTB/OTS Checks



INTEGRATED PROGRAM MANAGEMENT REPORT FORMAT 3 - BASELINE					Dollars IN _____		PENDING UPDATE TO OMB No. 0704-0188
5. CONTRACT DATA							
a. ORIGINAL NEGOTIATED COST	b. NEGOTIATED CONTRACT CHANGES	c. CURRENT NEGOTIATED COST (a. + b.)	d. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	e. CONTRACT BUDGET BASE (c. + d.)	f. TOTAL ALLOCATED BUDGET	g. DIFFERENCE (e. - f.)	
h. CONTRACT START DATE (YYYYMMDD)	i. CONTRACT DEFINITIZATION DATE (YYYYMMDD)		j. PLANNED COMPLETION DATE (YYYYMMDD)		k. CONTRACT COMPLETION DATE (YYYYMMDD)		l. ESTIMATED COMPLETION DATE (YYYYMMDD)

Is the value of Block 5.g. > 0? Was an OTB approved by the Government?

Compare the dates in Blocks 5.j. and 5.k.

If the date in 5.j. is later than 5.k., was an Over Target Schedule (OTS) approved?



Format 3 – EAC Check



INTEGRATED PROGRAM MANAGEMENT REPORT FORMAT 3 - BASELINE					Dollars IN _____		PENDING UPDATE TO OMB No. 0704-0188
5. CONTRACT DATA							
a. ORIGINAL NEGOTIATED COST	b. NEGOTIATED CONTRACT CHANGES	c. CURRENT NEGOTIATED COST (a. + b.)	d. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	e. CONTRACT BUDGET BASE (c. + d.)	f. TOTAL ALLOCATED BUDGET	g. DIFFERENCE (e. - f.)	
h. CONTRACT START DATE (YYYYMMDD)	i. CONTRACT DEFINITIZATION DATE (YYYYMMDD)		j. PLANNED COMPLETION DATE (YYYYMMDD)		k. CONTRACT COMPLETION DATE (YYYYMMDD)	l. ESTIMATED COMPLETION DATE (YYYYMMDD)	

Is there a difference between Blocks 5.k. and 5.l.?

Block 5.l. is the planned completion date consistent with the EAC.



Format 3 – PMB Change Check



FORMAT 3 - BASELINE														Dollars IN _____		OMB No. 0704-0188	
6. PERFORMANCE DATA																	
ITEM (1)	BCWS CUMULATIVE TO DATE (2)	BCWS FOR REPORT PERIOD (3)	BUDGETED COST FOR WORK SCHEDULED (BCWS) (Non-Cumulative)												UNDIS-TRIBUTED BUDGET (15)	TOTAL (16)	
			SIX MONTH FORECAST						ENTER SPECIFIED PERIODS								
			+1 JAN (4)	+2 FEB (5)	+3 MAR (6)	+4 APR (7)	+5 MAY (8)	+6 JUN (9)	+7 Jul (10)	+8 Aug (11)	+9 Sep (12)	+12 Oct-Dec (13)	+13 TC (14)				
a. PERFORMANCE MEASUREMENT BASELINE (Beginning of Period)																	
b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD																	
c. PERFORMANCE MEASUREMENT BASELINE (End of Period)																	
7. MANAGEMENT RESERVE																	
8. TOTAL																	



Check Block 6.b of the Format 3 to see what changes to the PMB were made during the reporting period. If so, were they explained in Format 5?





- **Do the variance narratives**
 - Address Root Cause?
 - Address Impacts?
 - Address Corrective Action including dates and accountability?
- **Is the content and use of UB explained?**
- **Are current period MR applications identified in Format 3 explained?**
- **Are differences in reported EACs explained along with assumptions?**





Home » Operational Management » Project Management » Earned Value Management

EARNED VALUE MANAGEMENT

- Aviation Management
- Executive Correspondence
- Energy Reduction at HQ
- Facilities and Infrastructure
- Freedom of Information Act
- Financial Assistance
- Information Systems
- Procurement and Acquisition
- Project Management
 - Earned Value**
 - Lessons Learned
 - Reviews and Validations
 - Documents and Publications
 - RCA and CAP

Earned Value Management (EVM) is a systematic approach to the integration and measurement of cost, schedule, and technical (scope) accomplishments on a project or task. It provides both the government and contractors the ability to examine detailed schedule information, critical program and technical milestones, and cost data.

- [EVMS Surveillance Standard Operating Procedure \(ESSOP\) - 26 Sep 2011 \(pdf\)](#)
 - [EV Guideline Assessment Templates - \(MS Word\)](#)
 - [DOE EVMS Cross Reference Checklist - \(pdf\)](#)
 - [DOE EVMS Risk Assessment Matrix - \(MS Word\)](#)
- [Formulas and Terminology "Gold Card" - Sep 2011 \(pdf\)](#)
- [Slides from the OECM Road Show: Earned Value \(EV\) Analysis and Project Assessment & Reporting System \(PARS II\) - May 2012 \(pdf\)](#)
- [DOE EVM Guidance](#)

EVM TUTORIALS

[Module 1 - Introduction to Earned Value](#) (pdf 446.86 kb) July 17, 2003

This module is the introduction to a series of online tutorials designed to enhance your understanding of Earned Value Management. This module's objective is to introduce you to Earned Value and outline the blueprint for the succeeding modules. This module defines Earned Value management. It looks at the differences between Traditional management and Earned Value management, examines how Earned Value management fits into a program and project environment, and defines the framework necessary for proper Earned Value management implementation.

<http://energy.gov/management/office-management/operational-management/project-management/earned-value-management>

- Career Development Program
- Real Estate
- History

