



EVMS



FAR Requires EVMS on a Cost Reimbursable or Incentive Contract

“ . . . based on ANSI/EIA Standard 748 ”

And what does that mean?

- ANSI/EIA 748 provides a list of guidelines
 - Organization
 - Planning, Scheduling, and Budgeting
 - Accounting Considerations
 - Analysis and Management Reports
 - Revisions and Data Maintenance

- But, ANSI/EIA 748 doesn't identify 'approved systems'



EVMS Requirements

- Proper WBS Design
- Baseline Budget Control Accounts
- Baseline Schedule
- Work measurement by Control Account
 - work-hours, dollars, units, etc.
- Good Project Management Practices



EVMS Challenges

- Quantifying/measuring work progress can be difficult.
- Time required for data measurement, input, and manipulation can be considerable.



Summary

- EVMS will help reduce guesswork in:
 - Measuring performance
 - forecasting
- Need to get beyond misleading measures of progress.
- Reasons to use EVMS:
 - Good project management practice
 - FAR requirement



Work Breakdown Structure---CPR Format 1

- Gives contract type & pricing arrangements
- Provides schedule and cost performance by WBS:
 - product -services-data
- Top contract level to lower detailed levels
- Contractor Budget & EAC by WBS
- Cost of Money
- General & Administrative (G & A)
- Undistributed Budget (UB)
- Management Reserve (MR)

**CONTRACT PERFORMANCE REPORT
FORMAT 1 - WORK BREAKDOWN STRUCTURE**

DOLLARS IN

FORM APPROVED
OMB No. 0704-0188

The public reporting burden for this collection of information is estimated to average 2.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing information collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, Washington Headquarters Services, Directorate for Information Operations and Reports. 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. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.

1. CONTRACTOR		2. CONTRACT		3. PROGRAM		4. REPORT PERIOD	
a. NAME		a. NAME		a. NAME		a. FROM (YYYYMMDD)	
b. LOCATION (Address and ZIP Code)		b. NUMBER		b. PHASE		b. TO (YYYYMMDD)	
		c. TYPE		d. SHARE RATIO		e. EVMS ACCEPTANCE NO YES (YYYYMMDD)	

5. CONTRACT DATA		6. ESTIMATED COST OF AUTHORIZED UNPRICED WORK		7. TARGET PRICE		8. ESTIMATED CONTRACT CBUNG		9. ESTIMATED CONTRACT CBUNG		10. DATE OF FOT/OT'S (YYYYMMDD)	
a. QUANTITY	b. NEGOTIATED COST			d. TARGET PROFIT FEE	e. TARGET PRICE	f. ESTIMATED PRICE	g. CONTRACT CBUNG	h. ESTIMATED CONTRACT CBUNG			

6. ESTIMATED COST AT COMPLETION			7. AUTHORIZED CONTRACTOR REPRESENTATIVE						
MANAGEMENT ESTIMATE AT COMPLETION (1)			CONTRACT BUDGET BASE (2)	VARIANCE (3)		a. NAME (Last, First, Middle Initial)		b. TITLE	
a. BEST CASE						c. SIGNATURE		d. DATE SIGNED (YYYYMMDD)	
b. WORST CASE									
c. MOST LIKELY									

ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION		
	BUDGETED COST		ACTUAL COST WORK PERFORMED (4)	VARIANCE		BUDGETED COST		ACTUAL COST WORK PERFORMED (9)	VARIANCE		COST VARIANCE (12a)	SCHEDULE VARIANCE (12b)	BUDGET (13)	BUDGETED (14)	ESTIMATED (15)	VARIANCE (16)
	SCHEDULED WORK (2)	WORK PERFORMED (3)		SCHEDULED (5)	COST (6)	SCHEDULED (7)	WORK PERFORMED (8)		SCHEDULE (10)	COST (11)						
a. WORK BREAKDOWN STRUCTURE ELEMENT																
b. COST OF MONEY																
c. GENERAL AND ADMINISTRATIVE																
d. UNDISTURBED BUDGET																
e. SUBTOTAL (PERFORMANCE MEASUREMENT BASELINE)																
f. MANAGEMENT RESERVE																
g. TOTAL																
8. RECONCILIATION TO CONTRACT BUDGET BASE																
a. VARIANCE ADJUSTMENT																
b. TOTAL CONTRACT VARIANCE																



Functional Categories--CPR Format 2

- Gives same contract, cost of money, G&A, UB, MR and contract total budget & LRE info
- Costs are broken out by contractor's functional organization (Vs. WBS)
- Provides schedule and cost performance status by organizational element; where is problem occurring, e.g.,
 - Engineering
 - Manufacturing
 - Subcontracts
- Best place to look at subcontract status
- Used to compare with man-loading status of Format 4



Baseline---CPR Format 3

- Gives summary contract cost change history
- Gives summary contract schedule dates
- Gives contract budget plan
 - total to date
 - amount this month
 - the remaining budget by month for 6 months & as government specified to contract completion
 - at the beginning & then the end of the month
- Important to note changes:
 - number, amount and location
 - during month, next 6 months and far term
- Used to indicate ability to meet schedule plan

**CONTRACT PERFORMANCE REPORT
FORMAT 3 - BASELINE**

DOLLARS IN _____

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The public reporting burden for this collection of information is estimated to average 6.3 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing this collection of information, and including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing this 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 Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1g, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Project Collection (0704-0188), Paperwork Project Collection (0704-0188), Washington, DC 20503. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1g, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Project Collection (0704-0188), Paperwork Project Collection (0704-0188), Washington, DC 20503. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.

1. CONTRACTOR		2. CONTRACT		3. PROGRAM		4. REPORT PERIOD	
a. NAME		a. NAME		a. NAME		a. FROM (YYYYMMDD)	
b. LOCATION (Address and ZIP Code)		b. NUMBER		b. PHASE		b. TO (YYYYMMDD)	
		c. TYPE	d. SHARE RATIO	c. EVMS ACCEPTANCE NO YES (YYYYMMDD)			

5. CONTRACT DATA		6. PERFORMANCE 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 (e. + d.)	f. TOTAL ALLOCATED BUDGET	g. DIFFERENCE (e. - f.)	
h. CONTRACT START DATE (YYYYMMDD)	i. CONTRACT DEFINITION DATE (YYYYMMDD)	j. PLANNED COMPLETION DATE (YYYYMMDD)	k. CONTRACT COMPLETION DATE (YYYYMMDD)
l. ESTIMATED COMPLETION DATE (YYYYMMDD)			

ITEM (1)	BOWS CUMULATIVE TO DATE (2)	BOWS FOR REPORT PERIOD (3)	BUDGETED COST FOR WORK SCHEDULED (BOWS) (Not-Contractive)										UNDIS-TRIBUTED BUDGET (15)	TOTAL BUDGET (16)	
			SIX MONTH FORECAST						ENTER SPECIFIED PERIODS						
			+1 (4)	+2 (5)	+3 (6)	+4 (7)	+5 (8)	+6 (9)	(10)	(11)	(12)	(13)			(14)
a. PERFORMANCE MEASUREMENT BASELINE (Beg. of Per. Od)															
b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
c. PERFORMANCE MEASUREMENT BASELINE (End of Per. Od)															
7. MANAGEMENT RESERVE															
8. TOTAL															



Manpower Loading/Staffing---CPR Format 4

- Uses same Format 2 functional organization reporting elements except for subcontracts.
- Uses same Format 3 reporting time periods
- Facilitates comparison of cost & schedule plan & performance with manpower loading plan & performance
- Useful for identifying manpower hiring shortfalls and growth
- Useful for projection for manpower requirements

**CONTRACT PERFORMANCE REPORT
FORMAT 4- STAFFING**

FORM APPROVED
OMB No. 0704-0188

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1. CONTRACTOR		2. CONTRACT		3. PROGRAM		4. REPORT PERIOD	
a. NAME		a. NAME		a. NAME		a. FROM (YYYYMMDD)	
b. LOCATION (Address and ZIP Code)		b. NUMBER		b. PHASE		b. TO (YYYYMMDD)	
		c. TYPE		d. SHARE RATIO			

5. PERFORMANCE DATA (All figures in whole numbers)

ORGANIZATIONAL CATEGORY (1)	ACTUAL CURRENT PERIOD (2)	ACTUAL END OF CURRENT PERIOD (Cumulative) (3)	FORECAST (Non-Cumulative)											AT COMPLETION (15)
			SIX MONTH FORECAST BY MONTH (Enter Names of Months)						ENTER SPECIFIED PERIODS					
			+1 (4)	+2 (5)	+3 (6)	+4 (7)	+5 (8)	+6 (9)	(10)	(11)	(12)	(13)	(14)	

6. TOTAL DIRECT
DD FORM 27344, MAR 05

LOCAL REPRODUCTION AUTHORIZED.



Problem Analysis/Explanations---CPR Format 5

- Gives contractor's summary contract status
- Gives explanation of variances
 - Where
 - How much
 - What happened
 - The solution
 - Impact
 - schedule
 - cost
 - technical
- Other analysis
- Over Target Baseline (OTB)

CLASSIFICATION (When Filled In)
CONTRACT PERFORMANCE REPORT
 FORMS 3 - EXPLANATIONS AND PROBLEM ANALYSES

FORM APPROVED
 OMB No. 0704-0188

The public reporting burden for this collection of information is estimated to average 36 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 Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1g, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Project (0704-0188), Washington, DC 20503. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.

1. CONTRACTOR		2. CONTRACT		3. PROGRAM		4. REPORT PERIOD	
a. NAME		a. NAME		a. NAME		a. FROM (YYYYMMDD)	
b. LOCATION (Address and ZIP Code)		b. NUMBER		b. PHASE		b. TO (YYYYMMDD)	
		c. TYPE	d. SHARE RATIO	c. EVMS ACCEPTANCE NO YES (YYYYMMDD)			

5. EVALUATION

Discussion should include but is not limited to:

Summary Analysis

- Summary of Overall Contract Variances
- Differences between EAC's (Blocks 6.a, 6.b, 6.c, or Block 8.15)
- Changes in Undistributed Budget
- Changes in Management Reserve
- Significant timephasing shifts in Baseline (BCWS) (Format 3)
- Significant timephasing shifts or Overall Changes in Forecasted Staffing (Format 4)
- Discussion of Over Target Baseline and/or Over Target Schedule incorporation

Analysis of Significant Variances: (identify and describe each)

- Type and Magnitude of Variance
- Explanation of Significant Reasons
- Effect on Immediate Task
- Effect on Total Contract
- Corrective Actions Taken or Planned



US Army Corps of Engineers



Questions