

# **EVMS Training Snippet Library: Schedule Guidance and Resources**



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

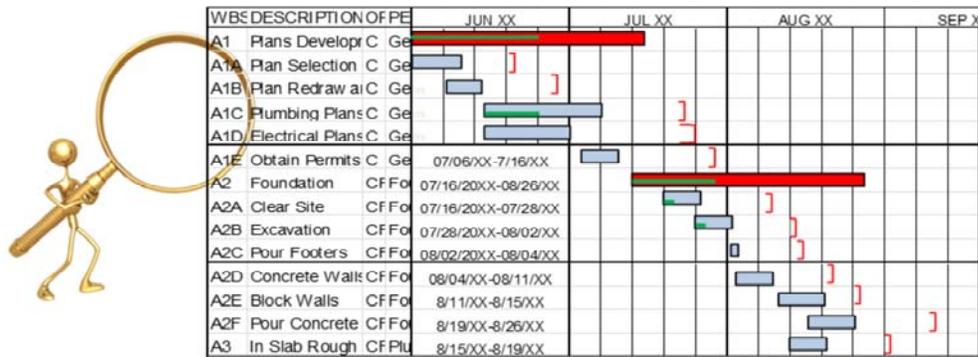
*Achieving Management and Operational Excellence*

This EVMS Training Snippet, sponsored by the Office of Acquisition and Project Management (OAPM) provides information on where to find more information about Scheduling.

# Schedule Guidance Resources



- Scheduling is a specialized field for a reason; it is complex and requires training and experience
- The purpose of the snippet is to provide experienced users with resources available



Scheduling is a specialized field; it is complex and requires training and experience. The purpose of this snippet is to provide experienced users with some of the resources available that contain scheduling guidance.



- **Published by:** National Defense Industrial Association (NDIA) Procurement Division – Integrated Program Management Division (IPMD)
- **Type:** Reference guide
- **Purpose:** Government and industry program stakeholders should use the PASEG to assist with the creation, maintenance, analysis, and management of Integrated Master Schedules to support compliance with the ANSI/EIA-748 Guidelines
- **Website:**  
<http://www.ndia.org/Divisions/Divisions/IPMD/Pages/Documents.aspx>

The National Defense Industrial Association (NDIA) Integrated Program Management Division (IPMD) has developed the Planning & Scheduling Excellence Guide (PASEG). The PASEG was developed to further explain the intent of Guideline 6. It explains using common scheduling terms, how to create an IMS consistent with the ANSI/EIA-748 requirements. It is also consistent with the IPMR DID.



- **Published by:** U.S. Government Accountability Office, GAO-12-120G
- **Type:** Best Practices Guide
- **Purpose:** The GAO Schedule Assessment Guide is intended to expand on the scheduling concepts introduced in the GAO Cost Estimating and Assessment Guide by providing ten best practices to help managers and auditors ensure that the program schedule is reliable. The reliability of the schedule determines the credibility of the program's forecasted dates for decision making.
- **Website:** <http://www.gao.gov/assets/600/591240.pdf>

The GAO Schedule Assessment Guide is intended to expand on the scheduling concepts introduced in the GAO Cost Estimating and Assessment Guide by providing ten best practices to help managers and auditors ensure that the program schedule is reliable. The reliability of the schedule determines the credibility of the program's forecasted dates, and other elements, and in turn, for making project decisions. The GAO Schedule Assessment Guide should be used as a primary reference when GAO issues it as final following resolution of public comments.

## EVMS & Project Analysis Standard Operation Procedure (EPASOP)



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- **Published by:** U.S. Department of Energy, Office of Acquisition and Project Management
- **Type:** Standard Operating Procedure
- **Purpose:** Primary reference for OAPM when conducting project-level data analysis to support Monthly Project Assessments and other assessment needs. Refers to several PARS II reports and provides instruction on interpretation of data to support project performance and predictive analysis and identify concerns with the contractor's EVMS.
- **Website:** <http://energy.gov/management/office-management/operational-management/project-management/earned-value-management>

The DOE OAPM EVMS and Project Analysis Standard Operating Procedure (EPASOP) is a primary reference for OAPM when conducting project-level data analysis to support Monthly Project Assessments and other assessment needs. The SOP covers the analysis reports contained in the Project Assessment and Reporting System (PARS II), and provides instruction on interpretation of data to gain insight into the health of the contractor's EVMS as well as to project performance and predictive analysis. The results of the analysis and output from the tools support Monthly Project Assessments, EVMS certification and surveillance, and any other project assessments where EVMS is contractually required.

## Additional DOE Snippet Schedule Information



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- **Snippet 3.1A** **IMS Initial Baseline Review**
- **Snippet 3.1B** **IMS Monthly Review**
- **Snippet 3.2** **Schedule Health Metrics**
- **Snippet 5.3** **PARSII Analysis: Schedule Health Assessment Reports**

For additional DOE Snippet schedule information, please refer to other Snippets in Group 3.

- Snippet 3.1A – IMS Initial Baseline Review
- Snippet 3.1B – IMS Monthly Review
- Snippet 3.2 – Schedule Health Metrics
- Snippet 5.3 – PARSII Analysis: Schedule Health Assessment Reports

## Summary



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- Scheduling is a complex process and an integral component of an integrated earned value management system
- Schedules are a common area of compliance issues
- The references/guidance provided are not intended to substitute for training project personnel responsible for development and maintenance of integrated master schedules

Scheduling is a complex process and an integral component of an integrated earned value management system. Schedules are a common area with compliance issues.

The references and guidance provided are not intended to substitute for training project personnel responsible for development and maintenance of integrated master schedules.

**DOE OAPM EVM Home Page**

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## 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  
**Earned Value**  
Lessons Learned  
Reviews and  
Validations  
Documents and  
Publications  
RCA and CAP  
Career Development  
Program  
Real Estate  
History

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>

For information relative to EVMS procedures, templates, helpful references, and training materials, please refer to OAPM's EVM Home page. Check back periodically for updated or new information.

Thank you