

EVMS Training Snippet Library:
The Integrated Program Management Report (IPMR)
Data Item Description



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

What is the IPMR?



- **The IPMR contains data for measuring cost and schedule performance**
- **Seven Formats:**
 - Format 1: Product-oriented Work Breakdown Structure
 - Format 2: Organizational structure
 - Format 3: Baseline changes
 - Format 4: Staffing forecasts
 - Format 5: Narrative report provides analysis information
 - Format 6: Integrated Master Schedule (IMS)
 - Format 7: Electronic History and Forecast Time-Phased Cost Data



- **Originated in Department of Defense (DoD) July 2012**
- **Merged the Contract Performance Report (CPR) and Integrated Master Schedule (IMS)**
 - Integrates cost and schedule
 - New DID is DI-MGMT-81861
 - Supersedes IMS DID DI-MGMT-81650 and CPR DID DI-MGMT-81466A
- **DOE adopting IPMR with only slightly modifications**



- **Reflects current contract status and projecting future contract performance**
- **Used as a basis for communicating performance status by DOE staff**
 - Including Office of Acquisition and Project Management, Project Management Support Office, Federal Project Directors, engineers, cost estimators, and financial management personnel
- **Uses**
 - Integrate cost and schedule performance data with objective technical measures of performance
 - Identify the magnitude and impact of realized and potential performance problem areas that may cause significant cost and schedule variances
 - Provide valid, timely, and accurate contract status information to Government leadership



- **Format form is unchanged from CPR**
- **WBS reporting level defined by Contracting Officer**
- **Refer to IPMR DID for detailed guidance for reporting on items such as**
 - AUW
 - UB
 - MR
 - EACs
 - OTB/OTS and Reprogramming
 - G&A and Cost of Money
 - Negotiated Cost

Format 1 – Work Breakdown Structure



INTEGRATED PROGRAM MANAGEMENT REPORT FORMAT 1 - WORK BREAKDOWN STRUCTURE													Dollars IN _____			PENDING UPDATE TO OMB No. 0704-0188				
The public reporting burden for this collection of information is estimated to average 3.1 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 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, 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			c. EVMS ACCEPTANCE NO YES (YYYYMMDD)										
5. CONTRACT DATA																				
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		i. DATE OF OTB/OTS (YYYYMMDD)			
6. ESTIMATED COST AT COMPLETION																				
MANAGEMENT ESTIMATE AT COMPLETION (1)						CONTRACT BUDGET BASE (2)			VARIANCE (3)			7. AUTHORIZED CONTRACTOR REPRESENTATIVE								
												a. NAME (Last, First, Middle Initial)						b. TITLE		
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						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 2 – Organizational Categories



- **Format form is unchanged from CPR**
- **Format 2 OBS not required to match Format 4 reporting**
- **Required by OBS instead of WBS**
- **Include subcontractors and material if applicable**
- **UB & MR match Format 1**



- **Format now requires reporting of PMB (BCWS) and changes authorized during the period**
- **Provides insight into changes to baseline going forward**
- **Provide discussions of changes in Format 5**
- **Still contains projected finish date and variances**

Format 3 - Baseline



INTEGRATED PROGRAM MANAGEMENT REPORT													PENDING UPDATE TO			
FORMAT 3 - BASELINE													OMB No. 0704-0188			
Dollars IN _____																
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 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 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, 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		c. EVMS ACCEPTANCE NO YES (YYYYMMDD)									
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)			
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																



Format 4 - Staffing



- **Format form is unchanged**
- **Format 4 OBS not required to match Format 2 reporting; requires Government concurrence**
- **Staffing information can be in hours, equivalent month, or total headcount**
- **Staffing forecast updated as part of formal EAC process**
- **Staffing forecast changes to be explained in Format 5**

Format 5 – Explanations and Problem Analysis



- **Top 15 approach to Variance Analysis**
 - Allowed for Government Selection or a defined contractor process that covers all aspects (current, cumulative and at-complete)
 - Allowed contractor or government to temporarily increase the number of reported variances to cover emerging trends
- **Linked Formats 1-4 and 6 discussions to Format 5**
 - Requirement to reconcile best/worst/most likely EAC
 - Significant Format 6 changes, e.g. SRA results, schedule duration assumptions, schedule margin status
- **Contractor format for delivery**



1. Contract Summary

- Significant changes that could impact technical, schedule, or cost objectives

2. Formal Reprogramming Analysis

- Discuss the authorization, reason, mechanics of implementation

3. EAC Analysis

- Explain the assumptions, methodologies between Best Case, Worst Case, and Most Likely EACs

4. UB Analysis

- Explain the content of the UB balance and changes within the reporting period



5. MR Analysis

- Explain the sources and uses of MR change
- Identify the WBS elements where MR was allocated

6. IMS Discussion

- Top 3 Critical and Top 3 Driving Paths; Total Baseline Variance
- Changes between Baseline & Forecast duration of Schedule Margin
- Changes to the Task Activity Codes or Data Dictionary
- Internal Schedule Health Analysis results



- 7. Format 3 Discussions - Significant changes, phasing, or totals**
- 8. Format 4 Discussions - Significant variances and shifts**
- 9. Cost and Schedule Variance Analysis**
- 10. Supplemental Discussions**
 - IBR Dates completed or proposed in next 6 months
 - Schedule Risk Assessment (SRA) results, if any, in past month
 - Assumptions, results, actions, and impact on EAC
 - Contractual De-scopes, if any, and how reported
 - G&A and Cost of Money explanation of add or non-add



- **Defines minimum level of subcontractor integration in prime contractor IMS**
- **Definition of Schedule Margin & SVTs included**
- **Requires disclosing of justification for Leads, Lags and most constraints**
- **Defines minimum fields in IMS**
 - Some were part of 2005 DID with additions
 - Definitions updated/clarified in various cases
 - Must support Government sorting and filtering requirements
- **Explains when SRA is required and how it is reported**



- **Consistency with Format 1 Addressed**
 - WBS numbering system in the IMS must be consistent with Format 1
- **Critical & Driving Paths**
 - Includes definition that tasks with “0” or negative total float are not by default the critical path
 - Driving path and interim milestones defined (not in 2005)
 - Excessive constraints and incomplete, incorrect, or overly constrained logic shall be avoided
- **Relationships & Float**
 - All non-constrained discrete tasks/activities/milestones shall have at least one predecessor and successor, except the start and end of the project



- 1. Control Account/Work Package Identification**
- 2. Subcontractor Task Identification**
- 3. Justification of Lead, Lag, Constraint**
- 4. Earned Value Technique (EVT)**
- 5. Risk Mitigation Tasks, as applicable**
- 6. Critical Path and Driving Paths**
 - If not identified by software



- **Schedule Visibility Tasks (SVTs)**
 - Content and labeling restrictions
- **Lead/Lag**
 - Real requirements and not to manipulate dates
- **Constraints**
 - Justify late type constraints and early type beyond 20 days
- **Schedule Margin**
 - Location and naming conventions
- **Task/Activity Codes and Data Dictionary**
 - Defines contractor fields and content, delivered infrequently

Format 7 – Electronic History and Forecast File



- **Defines the time-phased historical and future cost data**
 - Historical time-phased actual costs (ACWP)
 - Future time-phased Estimate to Complete (ETC)
 - All WBS elements
 - Must reconcile with Format 1 Block 8 Column (15) Estimate at Completion (EAC) for same reporting month
- **Provides supplemental historical and time-phased cost information, by WBS, generally at the same level as Format 1**
- **Electronic submission to PARS II, DOE's central repository**



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EARNED VALUE MANAGEMENT

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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>

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