DOE EVMS Review Procedure: Integrating Project Management Principles

Karen Urschel
Humphreys & Associates
Supporting Project Management Policy and Systems (PM-30)
Office of Project Management Oversight and Assessments (PM)

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Focus of this session . . .

- **Sharing Continuous Improvement**
  - With the improvements made in DOE in EVMS compliance assessment techniques and automation, the compliance review process has undergone major enhancements.
  - Provides stability in application with detailed roles and responsibilities, yet provide for the flexibility necessary in a data-driven compliance environment.
  - The level and scope of oversight is directly related to the results from the automated testing technology available.

EVMS Reviews – Then and Now
Evolution of Data Driven Approach

- **Past approach - Through 2010**
  - Assess contractor EVM system compliance during certification reviews and surveillances
  - Limited cost/schedule data analysis
- **Recent years – Since 2011**
  - Moved in direction of risk-based, data driven approach via EVMS Surveillance Standard Operating Procedure (ESSOP)
  - Roll-out of PARS II Central Repository and Assessment-Focused Standard Operating Procedures
- **2016 Forward**
  - Expanding the project management principles of EVM beyond Certification and Surveillance
  - Adjusting the approach to take full advantage of monthly data driven, automated testing environment

Order 413.3B Capital Asset Certification

- **Project TPC of $100M or greater:**
  - PM conducts the certification review process

- **Project TPC between $20M and $100M:**
  - Contractor maintain EVMS compliant with EIA-748C.
  - Recommend the independent assessment and maintenance be conducted using a self-governance approach
  - No formal determination or 'certification' of compliance

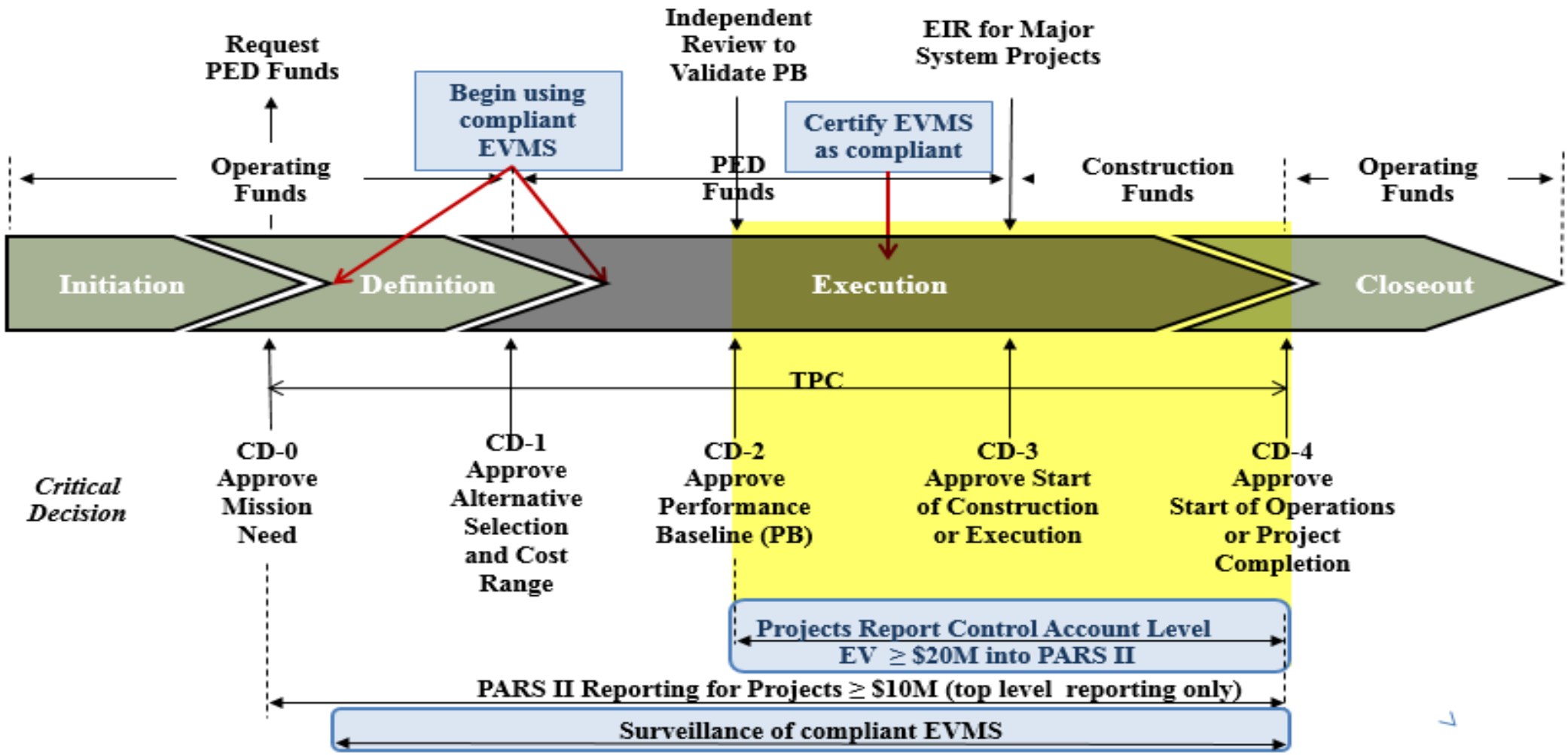
Order 413.3B Capital Asset Surveillance

- **Project TPC of $100M or greater:**
  - For contracts where there are applicable projects having a TPC of $100M or greater, PM will conduct risk-based, data driven surveillance during the tenure of the contract, during contract extensions, or as requested by the FPD, the Program, or the PME.

- **Project TPC between $20M and $100M:**
  - PM may, on an exception basis, or at the request of the PMSO, conduct EVMS reviews to document any areas of non-compliance when integrity issues are identified via normal project operations.

Integrated EVM / PM Acquisition Lifecycle

EVM is Integral to DOE's PM Philosophy from CD-0 to CD-4



Typical DOE Acquisition Management System for Line Item Capital Asset Projects

PM-30 Reviews Relating to EVMS

Types of EVMS Reviews

Certification Review (CR)	A formal review to determine that a Contractor's EVMS, on all applicable projects, is in full compliance with EIA-748C, or as required by the contract.
Implementation Review (IR)	This type of review extends the certification of a contractor's previously certified system to another facility, from one project to another project after a period of system non-use, from one certifying entity to another, and when the certified system has been significantly changed.
Review for Cause (RFC)	A review of specific elements of the contractor's EVMS that have displayed a lack of discipline in application or at risk of no longer meeting the requirements of the EVMS guidelines. Used to determine whether the company's EVMS certification should be withdrawn.
Surveillance Review (SR)	The process of reviewing a contractor's EVMS, on all applicable projects, to assess continuing compliance. Surveillance begins upon implementation by the contractor of a compliant system.

Types of PM Reviews Where EVM Applies

Independent Cost Estimate (ICE)	**A *cost estimate*, prepared by an organization independent of the project sponsor, using the same detailed technical and procurement information to make the project estimate. It is used to validate the project estimate to determine whether it is accurate and reasonable.**
External Independent Review (EIR)	**A project review performed by personnel from PM and augmented by individuals outside DOE, primarily to support validation of either the Performance Baseline (CD-2) or Construction/Execution Readiness (CD-3). PM selects an appropriate group of subject matter experts in a contracted capacity to assist with these reviews.**
Project Peer Review (PPR)	**Reviews conducted at the direction of the Deputy Secretary of Energy at least once a year for large (i.e., Total Project Cost of $100M or greater) or high visibility projects, and more frequently for more complex projects or those experiencing performance challenges. These reviews evaluate technical, managerial, cost, scope, and other key aspects so that necessary course corrections can be identified and projects can be delivered within original scope, cost, and schedule.**

How Does PPR Relate to EVMS?

- **Project Peer Review**
  - Conducted on projects with TPC >$100M semiannually; TPC<$100M as requested by Project Management Executive
  - Between CD-0 and CD-1:
    - EVM-related FAR and H Clauses for non-M&O Contractor Business Systems and Integrated Program Management Report (IPMR) Formats 1-7
    - O 413.3B EVMS requirements
  - Pre CD-2 Preliminary design and baseline (PB) development
    - Organization (GLs 1-5)
    - Planning, Scheduling, and Budgeting (GLs 6-15)
  - Post CD-2 Performance Measurement Baseline (PMB) review
    - Analysis and Management Reports (GLs 22-27)
    - Revisions and Data Maintenance (GLs 28-32)

How Does EIR Relate to EVMS?

- **External Independent Review Requirements**
  - Unbiased assessment of whether a capital asset project can be executed within proposed scope, schedule and cost commitments, while also meeting its key performance parameters and ultimately fulfilling its associated mission need.
  - PM to perform a "performance baseline EIR" prior to CD-2, Approve Performance Baseline, for all capital asset projects with a Total Project Cost (TPC) ≥ $100 million.
  - PM to perform a "construction/execution readiness EIR" prior to CD-3, Approve Start of Construction/Execution, for all major system projects (i.e., projects with a TPC ≥ $750 million or as otherwise designated by the Deputy Secretary).

How Does EIR Relate to EVMS?

- **External Independent Review EVMS Focus Areas**
  - Prior to CD-2:
    - Preliminary design is being developed and the baseline is being established. The EIA-748C compliance principles included in the pre-CD-2 EIR are Organization (GLs 1-5) and Planning, Scheduling, and Budgeting (GLs 6-15).
  - After CD-2:
    - The pre-CD-3 EIR team focuses on Planning, Scheduling, and Budgeting (GLs 6-15), Analysis and Management Reports (GLs 22-27), and Revisions and Data Maintenance (GLs 28-32) to evaluate how the contractor is performing against the baseline established at CD-2.
  - Specific EVMSIH QE LOIs and Tests within those Guidelines should be considered based on the EIR scope.

How Does ICE/ICR Relate to EVMS?

- **Independent Cost Review and Independent Cost Estimate**
  - Conducted on projects with TPC >$100M; at CD-0,CD-1,CD-2, CD-3,CD-3A
  - The focus of the ICR/ICE process is primarily:
    - Defining the work breakdown structure (GL 1),
    - Identifying the functional organization structure (GL 2),
    - Scheduling the work (GL 6), and
    - Establishing the time-phased baseline (GL 8)
  - Scope:
    - Evaluate the reasonableness of the overall project schedule, including resource loading and what resources are loaded.
    - Verify that the schedule contains all of the discrete work required to complete the CD-4.
    - Verify that the schedule contains complete WBS and OBS structures.

Roles/Responsibilities

PM-30 EVMS Functional Responsibilities

- Serve as EVMS Subject Matter Expert and assisting DOE employees and customers
- Develop and maintain EVMS related procedures and templates
- Serve as the lead for EVMS review team activities
- Coordinate compliance processes with all stakeholders to avoid duplication of effort, minimize cost, and increase communication.
- Plan and conduct EVMS Reviews in accordance with DOE O 413.3B requirements and as further defined in the ERSOP and EVMSIH.
- Determine subcontract requirements and assess contractor management of subcontractors in accordance with EVMS guidelines.
- Evaluate contractor proposed alterations to the system, including changes to documented processes and supporting procedures.
- Monitor Corrective Action Plan activities and verify to final closure.
- Upload all reports and supporting documentation to the central repository.

Supporting EVMS Functional Responsibilities

- **Certification Review Board (CRB)**
  - Advisory council providing guidance and recommendations to PM-1 relative to the EVSM review process
    - May include prioritization of the review schedule, team makeup, and Go/No-Go Decisions
- **PM-1**
  - Mission responsibility for project management oversight and assessments.
  - Maintains currency on all matters relating to EVMS compliance, policy, and training.
  - Certifying authority for EVMS as well as the authority to decertify.
  - Provides the resources and budget for conducting EVMS Reviews

Supporting EVMS Functional Responsibilities: PM-20 Project Analyst

- Participates in the EVMS Review process for assigned projects
- Provides in-depth knowledge of the project scope and specific concerns or impacts of current and future risks that will aid the EVMS Review team
- While conducting routine project level analysis plays a key role in providing an early warning of and assessing issues that may involve EVMS processes and implementation
- Responsible for coordinating with the PM-30 EVMS Specialist and working together to resolve data integrity issues which may trigger a risk based, data-driven Surveillance Review (SR)

Supporting EVMS Functional Responsibilities

- **PMSO EVMS SME**
  - Encouraged to participate as a team member in EVMS Reviews
  - Provides project-level EVMS insight, such as baseline changes, performance concerns

Supporting EVMS Functional Responsibilities: Contracting Officer (CO)

- Ensures applicable EVMS regulatory and contractual requirements, FAR clauses, data item and contract deliverables, and language is in the contract
- Ensures contractor performance is integrated with award fee determinations and other mechanisms to ensure pay for performance
  - Include assessment of EVMS system health as supported by EVMS Reviews
  - Formerly used methods such as basing award fee on EVMS cost and schedule metrics has been proven to be flawed and drives unintended behavior
- Formal determination of compliance is provided to the CO by PM-1, and the CO notifies the contractor of contractual compliance to EVMS
- At the completion of all formal EVMS Reviews, PM provide copies of reports to the CO.
- Should a contractor fail to maintain their system, PM may determine a Review for Cause (RFC) is necessary.
  - Upon the results of the RFC, PM may withdraw the EVMS certification. The CO would then officially notify the contractor via letter and may pursue contractual remedies.

Supporting EVMS Functional Responsibilities: Federal Project Director (FPD)

- Ensure timely, reliable and accurate integration of contractor performance data into the project's scheduling, accounting, and performance measurement systems, to include PARS II.
- When PM-30 leads an EVMS Review, FPD/IPT staff support includes:
  - Keeping PM-30 informed of actions and matters that could affect system compliance;
  - Assisting in the resolution of problems cited in the review reports;
  - Reviewing, evaluating, and analyzing performance reports and schedules and bringing system and implementation concerns, and data integrity issues to the attention of PM-30; and
  - Participating as members of the review team as requested.

EVMS Review Key Roles/Responsibilities

Review Director	A PM-30 senior representative responsible for ultimate approval of EVMS findings and reports.
Review Chief	Responsible for the overall conduct of the review; leads the Review Team in the execution of its duties and responsibilities before, during, and after the review.
Review Deputy	Supports the Review Chief and is responsible for the operation of the Review Team and the review process.
Review Assistant	Assists the Review Chief in handling all administrative details of the review.
Area Team Lead	Leads the assessment process and summarization of compliance for one of the five areas of the EIA-748C guidelines.
Interview Team Lead	Plans and manages the team in conducting Control Account Manager interviews.
Other Review Team Members	Perform detailed evaluations of the contractor's management systems and data analysis within their assigned Area.

Review Team Members Responsibilities

- Assist in Area Team assignments in evaluating the contractor's System Descriptions and supporting procedures
- Assist in Area Team analysis of test results and artifacts
- Assist in Interview Teams, providing expertise in the analysis results for their particular Area and documenting interview results
- EVMS Review team members may include DOE Project Controls Analysts/EVMS SMEs, DOE technical specialists participating in the DOE Project Controls Professional Fellowship Program, and direct contract support.
- Energy Facility Contractor's Group (EFCOG) EVMS/PCA SMEs may be asked to participate on review teams subject to non-disclosure agreements.

Compliance Corrective Actions

EVMS Compliance Corrective Actions

- **Identify EIA-748C EVMS non-compliances via data analysis and contractor personnel discussions**
- **Types:**
  - Process
  - Implementation
- **EVMS non-compliances range from inconsequential concerns to material weaknesses in meeting the intent of an EVMS guideline.**

Documenting Non-Compliances

- **Corrective Action Request (CAR)**
  - Used to document material discrepancies.
  - Characteristics of materiality include high dollar or high risk impact and/or recurring and pervasive across control accounts, projects, and/or contracts.
  - Impact could significantly influence performance measurement, accuracy, validity, reliability, and timeliness of the data.
- **Discrepancy Report (DR)**
  - Used to document non-material discrepancies.
  - Characteristics include low dollar, minimal risk non-compliances that require minor clarifications to processes, errors or oversights, and non-systemic, isolated, infrequent, and nonrecurring.
  - Impact would not significantly influence performance measurement.

General Rules for Documenting Findings

- A Guideline may have multiple CARs and DRs written against it
- A CAR or DR is written against only one QE LOI
  - Process non-compliances found in EVMSD or support procedures are written at the QE LOI level
  - QE LOIs with similar non-compliances may be combined when perceived root causes are similar
  - Ensure all relevant supporting exhibits are attached
  - Ensure combined CARs/DRs address materiality of the sum
- One QE LOI may have multiple CARs/DRs when:
  - Non-compliance is attributed to different tests that provide specificity for different suspected root causes
  - Process was non-compliant but Implementation was correct
  - Implementation was non-compliant but Process was correct
  - Both (when non-compliant process causes a non-compliant implementation)
  - Materiality differences

Materiality

- An assessment of materiality is the process to determine how an EIA-748C non–compliance impacts the ability of the contractor's EVMS to produce accurate information needed for project management purposes.
- Materiality addresses both process (written word) and implementation non-compliances.
- Similar non-compliances may be pervasive yet have a combined minor magnitude while a single non-compliance can be of high magnitude yet a single occurrence.

Materiality

- **When documenting materiality impact of non-compliances in the CAR/DR, the review team must clearly address the source of the impact to use of the data:**
  - For example: cost reporting, EAC calculations, critical path determinations, the accuracy of performance measurement.
- **For example, consider and explain impact to the stakeholder's:**
  - Ability to know where the project is in terms of scope/cost/schedule baseline plan.
  - Ability to know where the project is heading in terms of cost/schedule forecast.
  - Ability to take corrective action to address root cause issues driving scope/cost/schedule impact and bring project back into alignment with baseline plan.
  - Ability to make informed decisions such as to rebaseline to new cost/schedule targets (OTB/OTS) or change scope requirements.

Pervasiveness

- **Considerations / Calculations**
  - Systemic, across the project vice isolated noncompliance
  - Measured by number of similar non-compliances observed
  - Identify repeat findings from prior reviews as an indication of pervasiveness
  - May be calculated as a percentage of CAs, CAMs, or projects that failed the same QE LOI (only effective when all CAs are tested)
  - Scheduling metrics calculated by percentage of WPs or activities

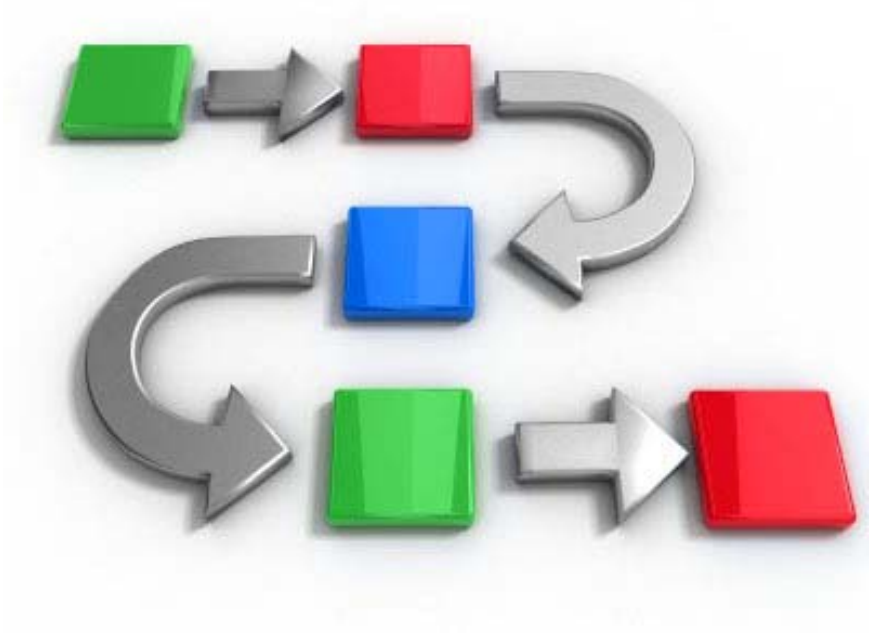
Magnitude

- **Considerations / Calculations**
  - Impact of data credibility for use in managerial assessment and decision making
  - Dollar value impact (including potential impact to annual funding and performance baseline breaches)
  - Risk impact associated with the non-compliance (low dollar/critical item vice high dollar/low risk)
  - May be calculated as a percentage of dollar value impact of non-compliance to the total PMB; schedule impact; cost or schedule impacts at a QE LOI level, or as summed to a GL level; or risk measurement based on impact of non-compliances to scope, cost, schedule.

Continuous Improvement Opportunity (CIO)

- Used to identify process improvement. CIOs share suggested best practices, lessons learned, or other efficiency or effectiveness measures to streamline processes.
- Encourages dialog to share thoughts and plans pertaining to the recommended suggestions
- Do not require a written response from the contractor or approval

Review Process



EVMS Review Phases

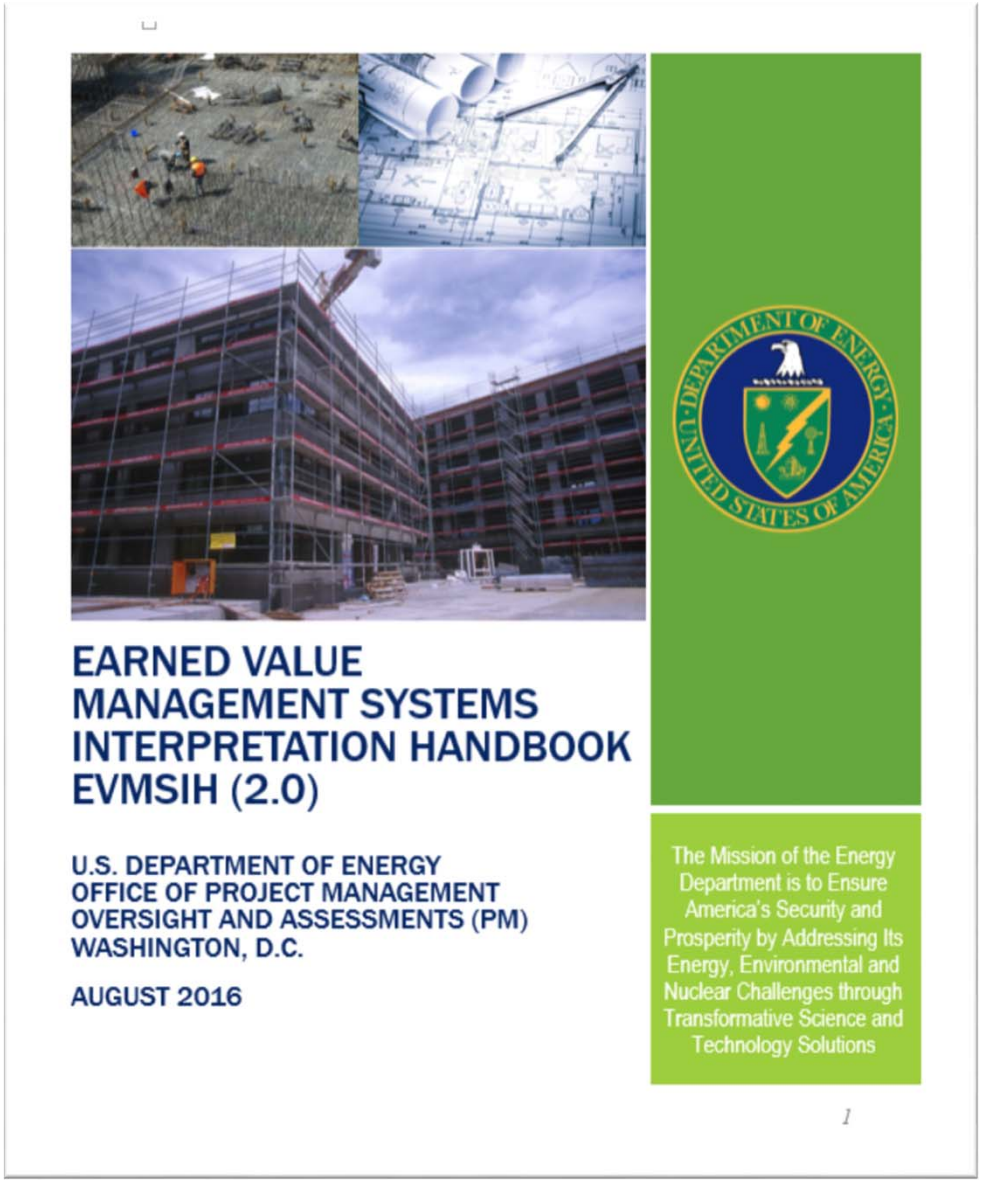
Phase	Purpose
Determine Need	Identify need and resources to conduct a EVMS Review or support an EIR/ICE/PPR.
Initial Visit (IV)	A PM-30 visit to new contractors requiring EVMS certification to provide early dialogue on the CR process, set review expectations among the stakeholders, and identify areas of noncompliance and/or potential concerns with the contractor's EVMS processes and procedures.
Data Analysis (DA)	Initial assessment of contractor's data and allows contractor demonstration of cost/schedule engines.
Readiness Assessment (RA)	Determines contractor's readiness for continuation of the review process via data analysis results and may include a Readiness Assist Visit.
On-Site Preparation and Review	Conduct final pre-visit assessments and preparations, proceed on-site to commence the formal review which concludes with a final exit brief to the contractor.
Post Review and Closeout	Document results of review, issue findings, monitor contractor corrective action plans, and conduct final closeout which includes a PM-1 memorandum to the CO.

Data Analysis Phase

Data Analysis

TASKS
• Identify, Plan, and Schedule Team Resources
• Issue Contractor Notification w/Request for:
• Automated Data (Cost and Schedule files)
• EVM System Description (SD) and Supporting Procedures
• Artifacts for Traces; Contractor Independent Assessment
• Contractor Demonstration of Cost/Schedule Engines via Webinar
• Conduct Analysis
• Run Automated Tests and Analyze Results
• Review EVMS System Description
• Conduct Artifact Traces
• Document Results; Identify Concerns

EVMS Interpretation Handbook (EVMSIH)



EARNED VALUE MANAGEMENT SYSTEMS INTERPRETATION HANDBOOK EVMSIH (2.0)

U.S. DEPARTMENT OF ENERGY
OFFICE OF PROJECT MANAGEMENT
OVERSIGHT AND ASSESSMENTS (PM)
WASHINGTON, D.C.

AUGUST 2016

The Mission of the Energy Department is to Ensure America's Security and Prosperity by Addressing Its Energy, Environmental and Nuclear Challenges through Transformative Science and Technology Solutions

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DOE PM EVMSIH is used by PM as the <u>authoritative source</u> to ensure consistency in determining compliance.

EVMS Compliance Considerations

- **Process Approach**
  - EIA-748 compliance definitions are translated into testing protocol flowcharts and developed for each QE LOI
  - 'Tripped' testing thresholds indicate an anomaly exists that may require further review and explanation
  - Definition of thresholds or tolerance levels consider the materiality of the breach

EVMS issue getting progressively worse

DOE EVMS Compliance Credentials in Jeopardy

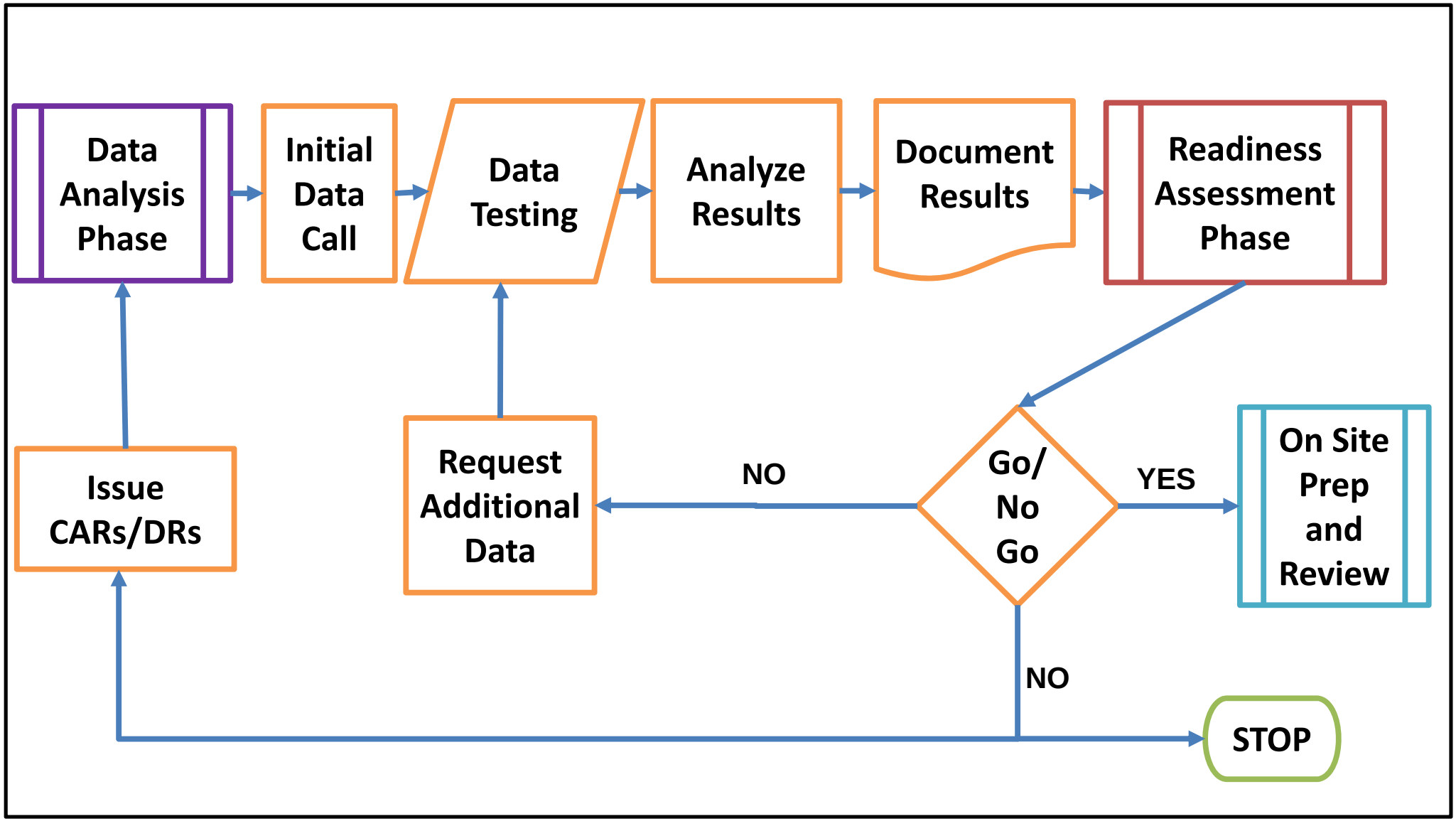
1st Trip	2nd Consecutive Trip	3rd Consecutive Trip	4th Consecutive Trip
Anomaly Noted	Contractor takes action to correct issue	Contractor develops a RCA (w/Fishbone)	PM-30 issues CAR

Readiness Assessment Phase

Readiness Assessment

TASKS
• Assess Contractor Readiness
• Conduct Readiness Assist Visit (RAV) (if needed)
• Document Results
• Go/No Go Decision
• No; Request Additional Data; Retest
• No; Issue CARs/DRs for Serious Data Validity Issues; Close Out; Restart
• No; Stop as No Concerns Found (Applies to Surveillance Only)
• Yes; Proceed to On-Site Preparation and Review
• Yes; Shift from SR to RFC and Proceed to On-Site Preparation

Go/No Go Process Flow

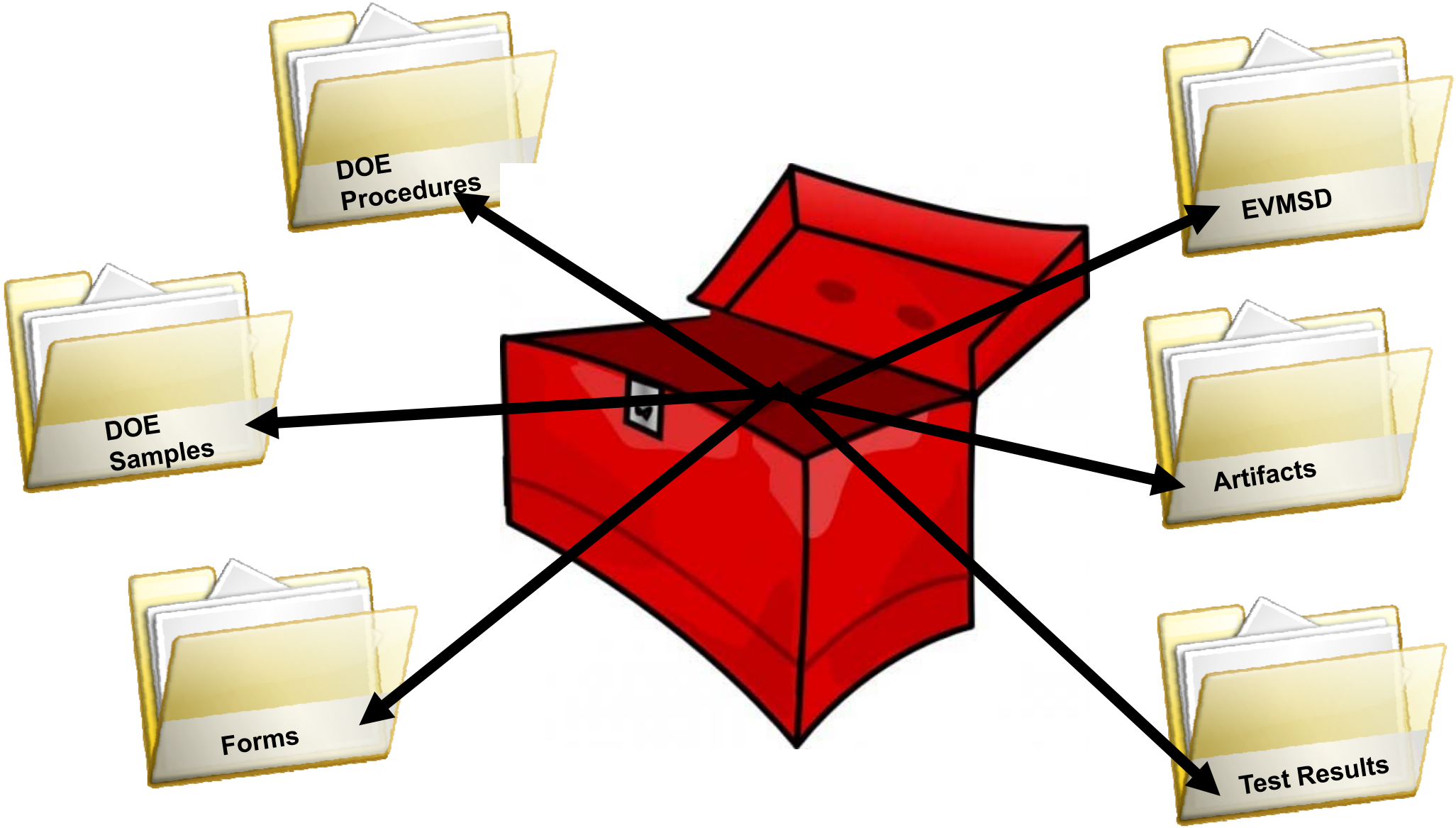


On Site Preparation and Review

On-Site Preparation

TASKS
• Determine Scope Based on Previous Phase and Type of Review
• Issue Contractor Notification Issued w/Request for Limited and Specific Artifacts
• Assemble Review Team and Make Assignments
• Conduct Artifact Traces and Final SD Review
• Make Interview Selections and Create Interview Findings Form (IFF)
• Prepare Review Plan
• Pre-Visit Review Team Preparation Meeting

EVMS Review Toolkit



How to Plan the Data-Driven Interviews

- **Interview Finding Forms (IFFs) are prepared for each Interview, tailored based on Data Assessment Results**
  - Area Leads develop IFFs for their assigned areas
  - The Area IFFs are then combined for each CAM into one IFF
- **Includes all identified flagged non-compliances to assess/capture materiality: Pervasiveness and Magnitude**
  - Where there are significant flags in a particular area, it may be necessary to review a representative sample
- **For Agenda scheduling purposes, estimate time needed to cover individual interview scope as it will vary based on areas of concern identified in completed IFFs**
  - Allow ample time immediately following the interview to compile results and make initial assignments for CARs/DRs/CIOs

Create Review Plan

- **Background of Contractor, Project, History**
- **Review Type and Scope**
- **Agenda**
- **Team Members and Assignments**
- **Travel Information**
- **Information from the ERSOP**
  - Process
  - Roles/Responsibilities
  - Forms/Templates

On-Site Review

TASKS
• Opening PM-30 Brief to Contractor
• Contractor Brief
• Conduct and Document Interviews
• Daily Review Team Meetings
• Daily Contractor Out-briefs
• Draft CARs, DRs, CIOs, and Guideline Summaries
• Exit PM-30 Brief to Contractor

Pre-Interview Instructions

- **Contractor Attendees:**
  - Interviewee
  - Support Staff, including but not limited to Planner/Scheduler, Project Controls
- **Instructions to Interviewee:**
  - The interviewee is instructed to answer the interview questions unless permission is given to allow others to respond.
  - The interviewee should request this assistance rather than the support staff spontaneously providing the information.
  - The goal of the interview is to gauge the interviewee's level of knowledge and not the knowledge of the support team.
  - Support staff may assist in navigation of live systems

How to Conduct Data-Driven Interviews

- **Explain Paradigm Shift from Traditional to Data Driven**
  - Not all interviews are the same; different questions for different folks
- **Explain the scope of the interview for the Interviewee**
  - Based upon the analysis, we are interested in (e.g. the baseline, the performance analysis, change incorporation . . .)
- **Ask about process first, then the specifics of the test result to fully understand the context and assess the Interviewee's knowledge**
  - Ex. How you are organized, how you planned the work, how you earn performance, how you arrived at your ETC, how you incorporate changes
- **Listen; Ask Clarifying Questions as Necessary**

During the Interview

- **Documenting the Interview:**
  - The interview team is responsible for obtaining evidence of compliance or non-compliance
  - The preferred method: Interviewee opens a power point file, captures screen shots from the live data as requested, and pastes the screen shots into the power point slide deck.
  - The file is provided to the Interview Team at the conclusion of the interview
  - The screen shots can be used for further review after the interview and, as warranted, used as exhibits attached to a CAR/DR.

Following the Interview

- **Interview Team Caucus:**
  - Consolidate notes to answer IFF questions, reference exhibits, make initial determination of CARs/DRs/CIOs
  - Interview Lead makes initial assignments for drafting of CARs/DRs/CIOs
  - Final assignments are made at end of day Team Meeting and subject to change based on consolidation of CARs/DRs based on QE LOIs

End of Day Team Meeting

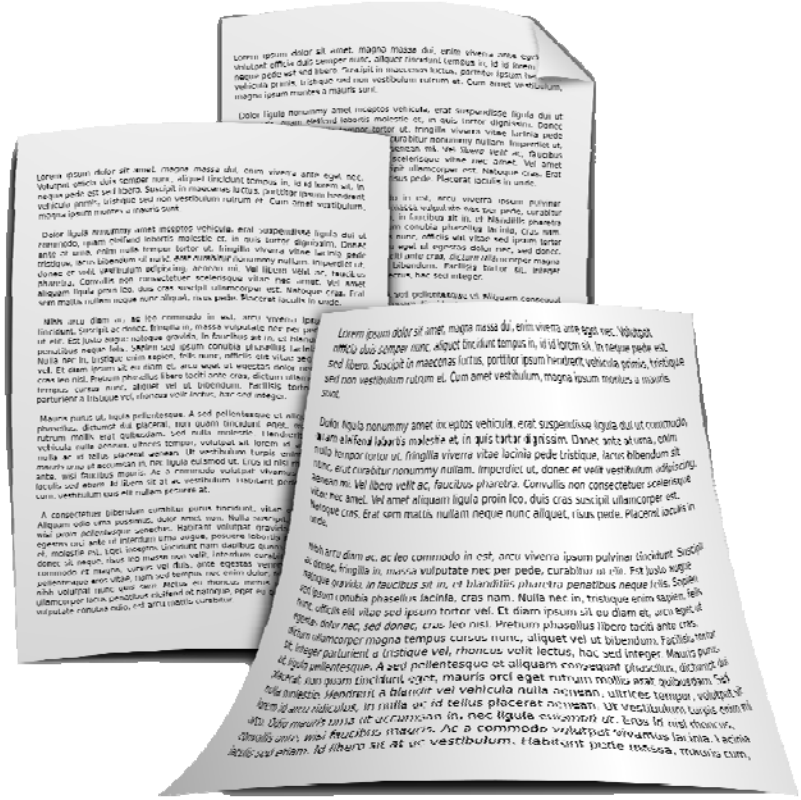
- **Interview Team Leads Out-Brief Interviews Conducted**
  - Identify QE LOIs
  - Outstanding requests for additional information
  - Other needs
- **Review Chief / Review Assistant**
  - Assigns similar non-compliances by QE LOI to only one author with assistance as necessary from other interview teams
  - Ensures that non-compliances are not a one-off; a single occurrence of an implementation and/or process non-compliance does not necessarily talk to the non-conformance of a larger group
  - Determines topics to be presented during the daily contractor brief

Daily Contractor Out-Brief

- **Review Director / Review Chief Leads**
  - Informs contractor of review progress at a high level
  - Identifies outstanding documentation or other requests
  - Specifics are avoided as the meeting is not intended to debate or defend findings but rather for communication purposes
  - Cautions the contractor that the daily brief findings are only preliminary and should not be considered as definitive results

Deliverables

- **Corrective Action Requests**
- **Discrepancy Reports**
- **Continuous Improvement Opportunities**
- **Guideline Summaries**
  - By Area
- **Final Report**



Final Report

- **Finalize CARs/DRs/CIOs/Guideline Summary Reports**
  - Based on Review Chief final feedback
- **Draft EVMS Review Report**
- **Conduct Factual Accuracy Review**
  - Review Director issues CARs/DRs to Contractor
  - Review limited to accuracy of facts and exhibits
- **Issue Report w/CARs/DRs/CIOs**

Closeout Activities

- **CR, IR, SR:**
  - No Further Action if No CARs/DRs
  - If CARs/DRs:
    - Contractor Corrective Action Plan
      - Review, Comment, Monitor Progress
      - Refer to ECASOP
      - Coordination to ensure understanding; iterative process
    - CAP Closeout (Remote or On Site)
      - Review Evidence Package
      - Close CARs/DRs as Verified
    - Issue Letter of Acceptance (Certification Reviews Only)
- **RFC or SR May Result in Decertification**

Record Keeping

- **Post Review Documentation to DOE Central Data Repository**

Certified EVMSD Changes

- **All changes to certified EVMSD and Supporting Procedures require PM-30 approval prior to implementation (Ref. DOE O 413.3B, Attach. 1)**
- **Process:**
  - Contractor submits changes via the DOE CO for PM-30 approval.
  - PM-30 reviews the proposed changes against EIA-748C based on EVMSIH to determine compliance.
    - If changes are acceptable, PM-30 notifies the CO. Changes deemed to be substantive will be annotated as a potential risk area and PM-30 may conduct an IR or SR for those areas affected by the changes.
    - If the proposed changes are not considered compliant, PM-30 works directly with the Contractor to reach agreement. If agreement is not reached, then a letter of non-consent is provided to the Program Office HCA/PMSO and applicable CO to forward to the contractor.

Resources

- **Guides:**
  - EVMS 413.3-10A update
  - Change Control Mgmt 413.3-20 update
- **Handbooks**
  - EVMSIH V2.0
  - Work Breakdown Structure
- **SOPs:**
  - EVMS Review (ERSOP)
  - Independent Cost Estimate/Review (ICE/ICRSOP)
  - External Independent Review (EIRSOP)
  - Project Peer Review (PPRSOP)
  - EVMS Corrective Action SOP (ECASOP)
  - EVMS Project Analysis SOP (EPASOP)
- **Training Snippets**

DOE PM Website - ENERGY.GOV/PM

Please find the full set of slides presented at the IPMW DOE Track on the DOE PM Website EVM Page http://www.energy.gov/projectmanagement/earned-value-management

EARNED VALUE MANAGEMENT

- Project Management
- Earned Value Management
  - EVMS Guidance
  - EVM SMEs
  - Training
  - Glossary of Terms & Acronyms
- Career Development (PMCDP)
- Policy Development
- Information Systems

KEY RESOURCES

- PMCDP
- EVMS
- PARS IIe
- FPD Resource Center
- PM Newsletter
- Forms and Templates

The mission of the DOE Earned Value Management website is to educate and train on theory and practice of Earned Value Management, and use it as an integrated Project Management process.

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.

In Summary – Key Takeaways

- **Overall compliance process flow**
- **How the process is tailored relative to:**
  - The type of review
  - Results of the data analysis
- **The expectations for:**
  - The contractor under review
  - The Review Team members
- **The complete toolkit available to review teams inclusive of templates**