

**Lab-Wide Earned Value
Management System Project
Core Team Kickoff Meeting**

April 16, 2008

Dean A. Hoffer.

Agenda

- History
- Definitions
- Requirements
- Work Scope
- Project Participants
- Project Collaboration Tool
- Reference Material
- Schedule
- Team Training
- Next Steps

Lab Earned Value History

- EV has been performed at some level since the Main Injector Project in the 1990s.
- In 1998 the Lab purchased Welcom's (now Deltek) Cobra software tool for managing project costs, measuring earned value, and analyzing budgets, actuals and forecasts. The software was purchased to support the NuMI Project.
- The Cobra software was made the Lab's standard software for measuring and reporting EV for projects that were required to report EV to DOE.
- Even though there was the Lab's standard software tool for EV, there was not a Lab standard for the EVMS process. Each new project has created their own version of an EVMS.

Definitions

- Earned Value (EV) – The value of completed work expressed in terms of the approved budget assigned to that work for a schedule activity or work breakdown structure (WBS) components.
- Earned Value Management (EVM) is a management methodology for integrating scope, schedule, and resources, and for objectively measuring project performance and progress.
- Earned Value Management System (EVMS) is a documented integrated set of processes to implement Earned Value Management.

Requirements

- DOE O 413.3A & DOE M 413.3-1 “Program and Project Management for the Acquisition of Capital Assets”
 - At CD-2, projects with a TPC <\$20M are not required to utilize an EVMS, but an alternative performance management system must be described in the respective Project Execution Plan.
 - At CD-2, projects having a TPC \geq \$20M and < \$50M are to have a self-certified EVMS that is compliant with ANSI/EIA-748-A.
 - At CD-2, projects having a TPC \geq \$50M are required to have an ANSI/EIA-748-A compliant system certified by the DOE Office of Engineering and Construction Management (OECM).

Requirements (continued)

- ANSI/EIA-748-A/B “Earned Value Management Systems” and Intent Guide
 - Standard provides basic guidelines to establish and apply an integrated EVMS utilizing 32 Criteria that are grouped into 5 major categories
 - Organization (5 criteria)
 - Planning, Scheduling and Budgeting (10 criteria)
 - Accounting Considerations (6 criteria)
 - Analysis and Management Reports (6 criteria)
 - Revisions and Data Maintenance (5 criteria)

Work Scope

- We are developing a Self-Certified EVMS that we are then requesting OECM to certify.
- Both a Certified and Self-Certified EVMS have to meet the same requirements, ANSI/EIA – 748.
- There are two parts that have to be accomplished to obtain a Certified system.

Work Scope (continued)

- Part 1 – Development and Implementation of a Lab-Wide EVMS Process
 - EVMS Management Policy
 - Lab-Wide EVMS Description Document
 - Implementing Procedures
 - Implementation Guides/Desktop Instructions
 - CAM Notebooks
 - Supporting Tools
 - Training
 - External Assessment

Work Scope (continued)

- Part 2 – OECCM EVMS Certification Preparation Process
 - Readiness Assessment Site Visit
 - Certification Review
 - Corrective Action Plan (CAP)
 - Follow-up Review

Project Participants

- Project Co-Sponsors
 - Hugh Montgomery
 - Steve Holmes

Project Participants (continued)

- Core Team

- Steve Dixon
- Ken Domann
- Harry Ferguson
- Bill Freeman
- Dean Hoffer
- Marc Kaducak
- Rob Kennedy
- Dale Knapp
- Elaine McCluskey
- Wyatt Merritt
- TJ Sarlina
- Suzanne Saxer
- Rich Stanek

Project Participants (continued)

- Tentative Oversight Committee
 - Bill Boroski
 - Steve Dixon*
 - Nancy Grossman
 - Dave Harding
 - Mike Lindgren
 - Ann Nestander
 - Ed Temple
 - Connee Trimby

* Serves on both Core Team and Oversight Committee.

Project Collaboration Tool

- Will use WelcomHome for document repository, action item tracking, etc.
- Address – <https://bss-pmprd.fnal.gov/wh/default.cfm>
- Team members who already have WelcomHome user accounts now have access rights to the Lab-Wide EVMS Project
- Team members without a WelcomHome user account will need to complete account request form

Reference Material

- Material is on the memory stick and is being added to WelcomHome
 - EVMS documents from existing Lab Projects
 - EVMS documents from other Labs
 - DOE and ANSI requirement documents

Schedule

- Draft MSP Schedule based on work to be accomplished, but has not been resource loaded.
- Key Activities/Draft Dates
 - Documents ready for Readiness Review - 08/12/08
 - Readiness Review by OECM - 10/09/08
 - OECM On-Site Review – 01/02/09
- Need Core Team members time availability to resource load schedule
- Have to contact OECM on 6-May on updated projected Readiness Review and On-Site Review dates

Team Training

- Discuss potential training needs for Core Team and Oversight Committee

Next Steps

- Commitment of time availability of Core Team Members
- Team Members to review reference material
- Team Members to review draft System Description document
- Evaluate list of Procedures needed to implement System Description
- Next meetings