

**Lab-Wide FRA EVMS  
Project Preparation Meeting  
with the  
NOvA Project**

August 28, 2008

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# Agenda

- Things for NOvA to working on
  - Work Authorization
  - FRA Variance Thresholds
  - Monthly ETC
  - \$RAM
  - CAM Notebooks
- OECCM's Expectations
  - 1 Day Planning/ Readiness Assessment Meeting
  - Full Week Certification Review

# Work Authorization

- PM-003 Implementing Procedure
- The Control Account Plan/Work Authorization document for each Control Account for all work under the TPC
- Open CAs need to have a WAD now and all CAs are to have a WAD by CD-2
- Form is in Appendix B of Procedure

# FRA's Variance Thresholds

**CPI and SPI Variance Threshold Flags for both  
Accumulative to Date and Rolling 3 Month  
Average at Control Account**

- Green .88 - 1.2
- Yellow .85 - .88, 1.3 - 1.5
- Red < .85, > 1.5

# Variance Thresholds

- NOvA can start implementing the thresholds for Accumulative to Date
- Implementation of Rolling 3 Month Average can be implemented after Cobra is upgraded and customized report is implemented – Current estimate of completion end of September

# Monthly ETC

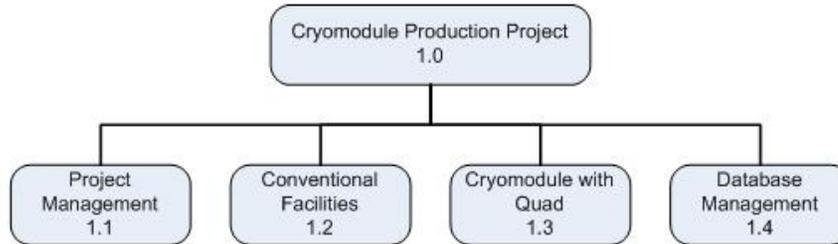
- PM-006 Implementing Procedure
- CAMs to perform monthly ETC as part of monthly status updates by projecting changes (revised dates, durations, resources, etc.) to the working schedule
- This is currently being done at some level, but not recognized as perform a ETC

# \$RAM

## (Responsibility Assignment Matrix)

- PM-001 Implementing Procedure
- The RAM is an essential element of the project plan that integrates the organizational structure defined in the OBS with the scope of work outlined in the WBS. The intersection point will also include the budgeted planned value (PV), resulting in a “dollarized RAM.”

## Project WBS



## Project OBS



CA A. Smith \$50k			
	CA R. Buildwell \$1250k		
		CA G. Coldham \$2000k	
		CA V. Singh \$1500k	
			CA J. Recallit \$150k

Control Accounts (CA)

# CAM Notebooks

- To provide the information for the Control Account Manager (CAM) to manage their work scope. The type of information to be available is work authorization, baseline and current schedule, budget, cost estimates, status updates, risks, variance analysis, change reports, etc. The notebook can be either electronic or paper format.
- Standard Template still to be established
- NOvA should identify what information/documents are currently being used by the CAMs to perform monthly updates and manage their CAs. Also, identify the source of the information. This can be used as a starting point to establish the standard template.

## 8-Aug Phone Conference With OECM Rep. Don Grace (continued)

- Proposed dates for 1 Day Planning/  
Readiness Assessment Meeting during the  
week of 8-Dec or 15-Dec
- Proposed date for full week Certification  
Review is the week of 16-Mar-09

# 1Day Planning/ Readiness Assessment Meeting

- **Major Objectives**

- Assure that the EVM System is sufficiently mature to warrant a review
- Provide constructive criticism of what may be potential findings that warrant attention prior to the execution of the week-long on-site review.
- Assuming that the on-site review should occur as planned, completing preliminary planning activities such as (1) determining a tentative number of personnel to be interviewed, (2) from this, determining the required size of the review team in order to have enough interview teams to finish the review within the one week time-frame, and (3) defining required logistics requirements to support effective conduct of the review.

# 1Day Planning/ Readiness Assessment Meeting

- **Agenda**
  - Introductions
  - Over-view of EVMS Certification Review Process (roughly 20 minutes; OECM is accountable for this)
  - Over-view of Contract, and Contract SOW for which EVM System is being applied: (30 minutes to one hour should be sufficient).
  - Over-view of EVM System (following roughly 2 hours of presentation, could allow for 30 minutes of further questions; would allow roughly 2.5 hours).
  - Open Discussion of EVM System Description and Implementing Procedures
  - Open Discussion of Dollarized RAM, Numbers and Names of Candidate Personnel to be Interviewed, etc.
  - Open Discussion of Logistic Requirements

# 1Day Planning/ Readiness Assessment Meeting

- **Materials needed**

- EVM System Description and Implementing Procedures - [OPMO]
- Dollarized RAM (showing individual CAM names, BAC, cum to date BCWS/ BCWP/ ACWP, and an indication of amount of CA that is LOE vs. Discrete) – [NOvA]
- Documents that provide high level definitions of scope/cost/ schedule baseline(s), change control thresholds table, project organization/ OBS, etc. (e.g., PEP/ PMP type document) – [NOvA]
- **The three most recent monthly reports (those provided to client, plus lower level control account EVMS reports)** – [NOvA]
- Change Control Logs (that show budget changes to affected Control Accounts, and resultant changes to the Contractor MR) – [NOvA]

# 1Day Planning/ Readiness Assessment Meeting

- **Participants**

- OPMO
- FSO
- NOvA Project Office (John, Ron, Nancy, Bill, Ken, Harry, Suzanne)
- PPD Division Head
- EVMS Project Core Team

# Full Week Review

- **Review Team**

- A review team will be constituted through the efforts of Tecelote Lead and the EM Program Point of Contact
- The team will most likely be comprised of three additional Tecelote employees (to function as leads for four of the five ANSI 748 defined functional areas), and primarily DOE employees to constitute the remaining review team members
- The fifth functional team is Accounting, and either another Tecelote representative (or the organization responsible for accounting oversight of FNAL) will lead that team
- As may be necessary, some of the remaining team members may come from other contractor organizations (who support contractors other than FNAL)

# Full Week Review

- **On-Site Review Agenda**

- Elaine and I will work with Tecelote Lead to finalize an agenda for the week of the review, and to provide materials that the review team will require prior to coming on-site.

- **Materials**

- This material consists primarily of an EVM System Description and implementing procedures
- Several of the most recent monthly reports (including internally used Variance Analysis Reports, and not just higher level roll-up reports that may be provided to your client)
- Dollarized Responsibility Assignment Matrix (RAM)
- Copy of the DOE/ FRA contract (and/ or DOE Project Execution Plan) that defines the project scope of work
- Project Management Plan that further describes the functional objectives/ high level scope of work and associated cost and schedule baselines
- Additional documentation may be requested (e.g., Change Control Logs, etc)

# Full Week Review

- **Approach to the Review:** The review is in essence a two-part review to assure compliance with ANSI 748 (with the review organized to focus primarily on compliance with the 32 Guidelines of ANSI 748).
  - The first part is to review the EVM System Description (and implementing procedures) to assure they are compliant with ANSI (much of this effort occurs prior to coming on site, and during the early part of the on-site review week).
  - The second part consists of interview teams talking with CAMs, key Project Controls personnel, and others. In the process of doing these interviews, they in essence do data traces, and related activities, to assure that the personnel are implementing the Earned Value Management System in a manner that is consistent with the System Description and implementing procedures.

# Full Week Review

- **Review Week Agenda**
  - Monday am: EVMS Team members gets together for a brief training section, to get organized, etc. Logistics requirements generally consist of the team needing a room large enough to accommodate roughly 15 people, several computers of which at least one is linked to a printer, and an ability to exchange files among computers (e.g., just being able to copy from and to a stick file is fine).
  - Monday afternoon: By roughly this time the contractor will provide a brief overview of the project, followed by a more detailed discussion of the modules that make up the over-all EVM System and how data flows among the modules (e.g., Scheduling System, Cost Processor, Accounting System, EVM Reporting System, etc). The team will then further review EVMS documentation, and interviews will probably start Tuesday morning and run through sometime on Thursday.

# Full Week Review

- **Review Week Agenda (continued)**
  - At the end of each day of interviews (i.e., Tues, Wed, and Thurs) OECM and Tecelote Lead will provide the contractor an out-brief of what may be potential “issues”. This is done to ensure no misunderstandings on the part of the review team, and no surprises on the part of the contractor when the out-brief occurs at the end of the week (note: the final week end out-brief usually occurs sometime between 11:00 am and 2:00 pm on Friday).
  - Friday Outbrief: The on-site review ends with an out-brief, provided by OECM and Tecelote Lead. At this time the Tecelote Lead will hand the Contractor hard copies of the findings (termed “Corrective Action Requests”, or CARs; these require a formal response (termed “Corrective Action Plan”, or CAP)). At this same time, “Continuous Improvement Opportunities” will also be handed to the contractor; however, these do not require a response.

# Full Week Review

- **Participants**

- OPMO
- FSO
- NOvA Project Office (John, Ron, Nancy, Bill, Ken, Harry, Suzanne)
- PPD Division Head
- EVMS Project Core Team
- NOvA CAMs
- Director/Deputy Director
- CFO/Budget Officer
- Other Division Heads (1<sup>st</sup> and Last Day)