

Notes and comments

Document: **Earned Value Management System Description** [SD] dated December 2, 2008

- Overall Comment: The SD is written at slightly higher level than what OECM might expect. There appear to be cases where certain Government documents have been used to “cut and paste” standard language that provides little insight into how FNAL’s EVMS works. If the procedures addressed step-by-step processes, that might not be a concern. However, the procedures themselves reflect more policy statements of what “will” be done, rather than “how” it is done. There’s nothing blatantly incorrect, but it’s not very specific.
- Section 2.0 third paragraph – The organization structure is described in the PEP – check this.
- Section 2.3.1 – OBS is in the PEP – check this.
- Section 3.0 second paragraph mentions (twice) contingency / management reserve in one phrase – without distinction or separation. I don’t think that this is adequate since they are clearly two different things. It’s unclear if the approach to C/MR to be taken on this program will always be the case. If not then perhaps the SD should reflect a more traditional approach and let the PEP/PMP be tailored to reflect how MR/C will be handled in each instance.
- Section 3.2 – This whole section doesn’t do a good job of relating risk to EVMS. What’s in the baseline and what’s not from a risk standpoint? How was Contingency/MR established? How will they/it be used? The words are not incorrect, it’s just not clear the relationship of RM and EVM.
- Section 3.4.1 third paragraph – Describes the schedule as belonging and being developed by “everyone”. But, it doesn’t describe who is responsible for the integration of the schedule, etc. Check procedure -004 for better assignment of responsibility. It is later (about 5th paragraph) as the responsibility of “Project Management” – still too general for me.
- Section 3.4.2 - describes the baseline schedule as being down to the Control Account level, but also says that it is “under configuration management”. This seems to be conflicting since baseline changes at the Control Account level normally occur too fast to be controlled in this way.
 - Control Milestones sound like something specific but they are never defined.
 - 2nd para – “the baseline schedule should be consistent with...” “Should be? Isn’t it a must be?”
- Section 3.4.3 – describes the working schedule as being a network based schedule. Isn’t the baseline schedule also a networked plan?
- Section 3.4.3 – describes the working schedule as being maintained by the project controls staff. If so, why aren’t they responsible two paragraphs up?
- Section 3.4.4 – Any supplemental schedules need to be consistent with the working/current schedule, though.
- Section 3.5.2 – Budget at Completion is not just at the total project level. Any work scope element has a BAC.
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- Section 3.5.2 – PMB -, last sentence should read: “The PMB is altered only through the change control process.”

- Section 3.5.2 –UB- NDIA has never been defined.
- Section 3.5.2 – Distributed Budget is not a specific EVMS term Also part of the “distributed budget” are Summary Level Planning elements that are not addressed.
- Section 3.5.2 last paragraph – Describes contingency as being timephased. How do you do this? If we don’t know what it will be used for, how can we time-phase it? It also might lead one to conclude that it’s in the PMB.
- Section 3.5.3 last paragraph – If LOE is considered as a Performance Measurement Technique (PMT) then the rule that allows a different PMT to be applied to different activities within a Work Package isn’t acceptable. I think that discreet PMTs must be separated from LOE PMT at least at the Work Package level.
- Section 3.5.3 last paragraph – The sum of WP budgets only equals the CA budget in the absence of Planning Packages (PP). Will FNAL never use PPs?
- Section 3.5.5 – Overhead “rates” are not distributed, OH “costs” are distributed.
- Section 3.6.1 third paragraph – Says that if a Control Account has a scope reduction the resulting budget reduction is returned to contingency. Why would this be done? Why isn’t it just returned to Management Reserve?
- Section 3.5.3 last paragraph- “unopened WPs can be replanned without change control? This will probably not be found to be acceptable.
- Section 3.8.1 – For subcontracts with a flowdown, it’s not just reporting that you ask for is it? You should require that they implement an EVMS and report consistent with your needs for EV data.
- Section 4.1.2 – What does it mean to close a Control Account? How is it done? Who does it?
- Section 4.1.5 –2nd to last sentence: “procedures are in place...” What are these procedures?
- Section 4.1.6 – “...ACWP for these subcontracts may require that an accrual be made...” May or does require?
- Section 4.4 first paragraph – This paragraph says that direct costs are burdened at the Work Package level. How can this be done since section 4.1.2 says that charge numbers are assigned at the Control Account level?
- Section 5.2.1 – ETC: “generally performed by the CAM?” Who other than the CAM would prepare an ETC?
- Section 5.2.1 – “When appropriate...EAC calculated values.” This needs some explanation. Under what circumstances would PM supplant the ETC?
- Section 5.1.2.3 second paragraph – The current schedule should be archived monthly on the date of month-end reporting to match the EV reporting.
- Section 5.2.3. – 1st sentence: Don’t make the CAMs do the calculations. Provide them to the CAMs for their consideration.
- Section 6.1.5, 1st sentence – “...authorized contract.” Don’t you mean the “project?”