

<b>SUBJECT:</b>	<b>FERMI RESEARCH ALLIANCE PROCEDURES PROJECT MANAGEMENT</b>	<b>NUMBER:</b>	12.PM-008
<b>RESPONSIBILITY:</b>	Office Project Management Oversight	<b>REVISION:</b>	<u>32</u>
<b>APPROVED BY:</b>	Head, Office Project Management Oversight	<b>EFFECTIVE:</b>	<u>09/17/0903/09/201</u>
<b>TITLE</b>	<b>EVMS Surveillance and Maintenance</b>		<u>2</u>

DRAFT FOR DISCUSSION

**1.0 PURPOSE**

This document describes the procedures used to assess the health of FRA's Earned Value Management System (EVMS) and to make changes regarding implementation, to ensure compliance with FRA's certified EVMS as well as the ANSI/EIA-748-B Guidelines.

**2.0 SCOPE**

These procedures describe the surveillance of the FRA EVMS that may be done as one of the following:

- 1) as part of project Director's CD-2 baseline reviews
- 2) in periodic (minimally annual) reviews against the ANSI EVMS Guidelines and FRA EVMS
- 3) as continuous improvement when feedback is received from EVMS users

**3.0 PROCEDURE**

**3.1** Surveillance as part of Director's CD-2 Baseline Reviews (for DOE Projects):

All DOE projects requiring use of earned value management will have, as part of their Fermilab Director's CD-2 Director's Review, a review of the project's implementation of the FRA EVMS. This component of the review will be assigned to specific review member(s) by the Fermilab Office of Project Management Oversight (OPMO). Items for reviewer focus shall include a demonstration of the project use of the EVM system to establish that the project is compliant with DOE and ANSI requirements.

The findings and recommendations resulting from the review will be documented as part of the Director's CD-2 Review Closeout Report.

**3.2** Periodic FRA EVMS Surveillance:

At least annually, the Fermilab ~~Office of Quality and Best Practices (OQBP)~~ Office of Program and Project Support (OPPS) will ~~organize~~ conduct a surveillance of the FRA EVMS. This surveillance will include all the projects required to use the FRA EVMS at the time of the surveillance. The surveillance should be structured to facilitate the exchange of information about EVMS process implementation for each project. The purpose of the surveillance will be to validate that the FRA EVMS is meeting the ANSI 32 Criteria, as well as the implementation of the EVM System Description and Procedures. ~~OQBPPS~~ will develop a surveillance plan outlining how the surveillance will be performed. The plan is to include the list of projects to be looked at and what aspects of the EVMS will be evaluated on each project. The plan is to assure that all aspects of the FRA EVMS are covered during the surveillance. It is expected that not all aspects of EVMS will be evaluated for every project.

PROCEDURES: Surveillance and Maintenance			
NUMBER 12.PM-008	REVISION <del>32</del>	EFFECTIVE: <del>09/17/09</del> 03/09/2012	PAGE 2 OF 4

## DRAFT FOR DISCUSSION

The committee performing the surveillance will be organized by O~~PPS~~QBP and consist of EVMS-experienced individuals. To ensure independence, team members will not evaluate their own projects.

The committee shall have a charge, a timeframe for conducting the surveillance, a process for verifying and sharing information with projects' management, and a clear format for reporting findings and recommendations. Resolution of these results will be the responsibility of OPMO.

### 3.3 Recommendations for Earned Value Management System (EVMS) Improvements:

When projects are using the EVMS, issues may arise regarding how processes are actually working, topics that have not been adequately addressed, or other concerns about how the EVMS is functioning. In the spirit of continuous improvement, those issues should be brought to OPMO as they arise for investigation and review. Disposition of the findings may result in updates to the EVMS documentation or tools.

### 3.4 Earned Value Management System Maintenance

Surveillance of the EVMS may result in changes. These changes will be proposed and reviewed prior to approval and implementation. All coordinating documentation will be checked and changed if required. A log of changes for each document will be maintained in compliance with standard configuration management practices.

## 4.0 REFERENCES

National Defense Industrial Association (NDIA) *Program Management Systems Committee (PMSC) Surveillance Guide*  
 ANSI/EIA-748-B *Earned Value Management Systems*  
 FRA *Earned Value Management System Description*

## 5.0 APPENDIX

12.PM-008A: Appendix A: Signature Page and Revision History .  
 12.PM-008A: Appendix B: Acronyms and Glossary .

**Appendix A**  
**SIGNATURE PAGE AND REVISION HISTORY**

This procedure approved by: \_\_\_\_\_  
**Director, Office of Project Management and Oversight** **DATE**  
**Fermi National Accelerator Laboratory**  
**Dr. L. E. Temple**

**TABLE OF REVISIONS**

Author(s)	Description	Revision	Date
	Initial Version	0	10/17/08
Elaine McCluskey	Updated references to Fermilab and clarified the surveillance planning.	1	03/27/09
E. McCluskey	Revised ANSI/EIA-748-A to ANSI/EIA-748B	2	09/17/09
<u>M. Kaducak</u>	<u>Updated section 3.2 to describe that OPSS will be organizing the surveillance reviews</u>	<u>3</u>	<u>03/09/12</u>

## **Appendix B Acronyms and Glossary**

**ANSI** – American National Standards Institute

**CD** — Critical Decision

**EIA** – Electronic Industries Alliance

**EVMS** — Earned Value Management System

**DOE** — Department of Energy

**FRA**— Fermi Research Alliance

**OPMO** — Office of Project Management Oversight

**Critical Decision (CD)** – On DOE projects, a formal determination made by the Acquisition Executive and/or designated official at a specific point in a project life cycle that allows the project to proceed. Critical Decisions occur in the course of a project: at determination of Mission Need (CD-0), at the completion of conceptual design (CD-1), at project baselining (CD-2), at the commencement of execution (CD-3), and at turnover (CD-4).

**Office of Project Management Oversight (OPMO)** - The organization within Fermilab with the responsibility and authority for Director's Policy 12 (Project Management). The office has the responsibility to oversee management of projects >\$5M, conduct Director's Reviews and create and maintain project management-related procedures.

**Office of Quality and Best Practices (OQBP)** - The organization within Fermilab with the responsibility and authority for Director's Policy 10 (Quality Assurance). The office has the responsibility to oversee quality assurance activities.

**Office of Program and Project Support (OPPS)** - The organization within Fermilab with oversight of OPMO and OQBP.