

OSD EVM Data Requirements

Integrated Program Management Report (IPMR) Data Item Description (DID) & Work Breakdown Structures (WBS)

August 15, 2012



Outline

- Introduction
 - Vision and Mission
 - EVM Data Requirements Review
 - WBS Development
 - EVM Data Requirements
- ▶ IPMR Overview

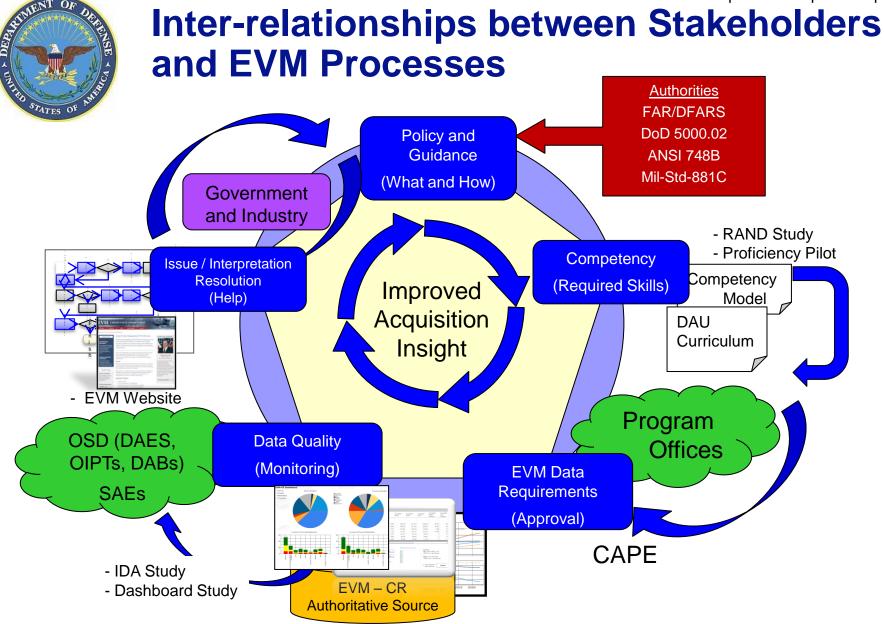


PARCA EVM Vision

▶ Earned Value Management (EVM) is a management tool that is fully embraced by the DoD acquisition community.

Guiding Principles:

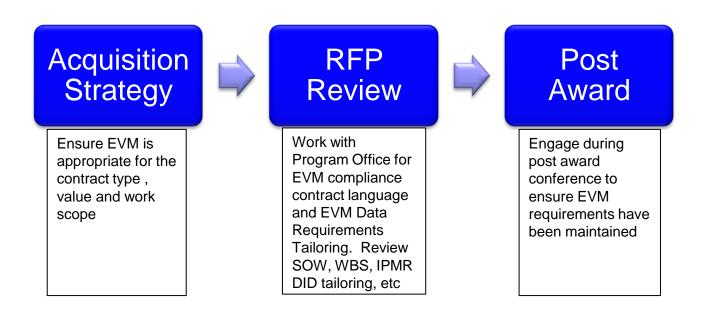
- Increase the quality and utility of EVM data.
- Increase the use of EVM across the acquisition chain.
- Acquisition professionals have the necessary knowledge & skills to utilize EVM in their professions.
- Reduce the administrative and economic burden of inefficient implementation of Earned Value Management Systems (EVMS).
- Ensure constructive communication amongst the acquisition community to include industry and Government.





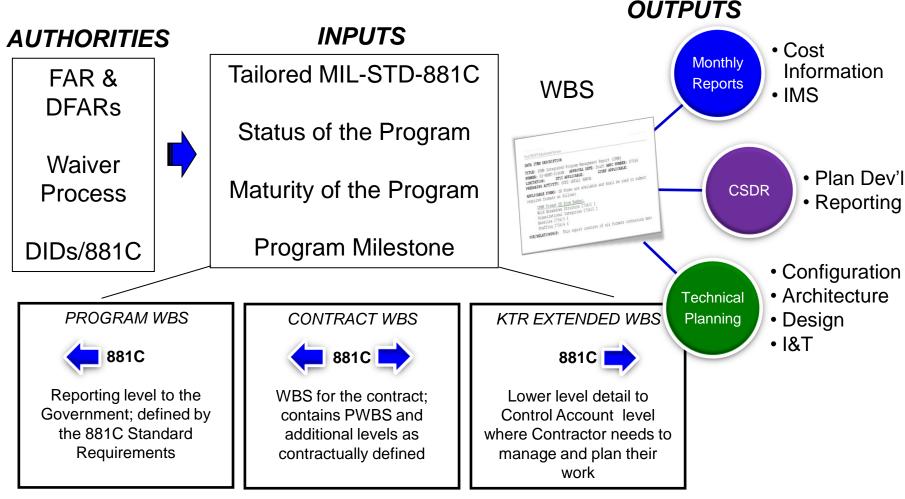
PARCA Authorities in Data Requirements

- Advisor on EVM Waivers
- ▶ August 10, 2011 EVM Authorities Memo
 - "Resolve differences in interpretation of EVM policy, practice, and requirements among Components..."
 - "Review and approve EVM data requirements for MDAP Programs..."





WBS Development





Tailoring vs Waivers

- ▶ Often EVM can be tailored to achieve level of management engagement and oversight without a full waiver.
 - IPMR has tailorable options to help PMO receive right amount of data.
 - Goal of tailoring includes the reduction of the economic burden.
- ▶ To date PARCA has been engaged with 14 programs from various Services/Agencies to assist in defining appropriate EVM application.
 - Requests for review have been primarily for sustainment efforts and ID/IQ type contracts.

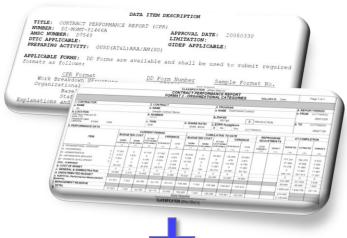


IPMR OVERVIEW BY FORMAT



CPR & IMS = IPMR

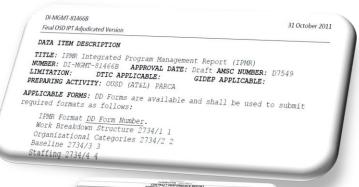
CPR DID



IMS DID



IPMR DID





IPMR DID officially released 19 June 2012

The IPMR DID is effective 1 July



IPMR Applicability

- ▶ 252.234-7001, 252.234-7002, DoDI 5000.02:
- ▶ EVM Requirements
 - Contract Type is Cost or Incentive
 - Contract Value > \$50M
 - Full EVM Reporting (IPMR all Formats, tailored level of detail)
 - Government Compliance Review Required.
 - \$50M > Contract Value > \$20M
 - Tailored EVM Reporting and tailored level of detail, minimum requirement is Format 1, 5, and 6 of IPMR
- ▶ Non-EVM Requirements Contracts
 - Cost Type Contracts less than \$20M EVM is PMs discretion
 - Formal 6 required for all development, major modification and LRIP efforts regardless of contract type.



DID Topical Matrix

	2005	Oct 2012	Feb-Apr 2012	Jun 2012
General Topic Areas				
Reporting Frequency	12WD (up to 17WD)	10WD 1-4, 6; 13 Fmt 5	Various versions:	12WD (up to 17WD)
			- 13th CD	
			-12th WD, Format 5 on 15th WD	
			- 12WD (up to 17WD)	
WBS Consistency	Mil-HDBK-881 and CWBS DID,	MIL -STD 881,CWBS DID, CSDR	MIL -STD 881	The submission of Format 1 data
	CCDR as applicable			shall utilize a product-oriented
				WBS at the level established by
				tailoring the appropriate MIL-
				STD-881 appendix
Reporting Level	Normally Level 3 or lower	Control Account consistent with	Control Account consistent with	MIL-STD 881, CA/HRs Optional
		MIL-STD 881	MIL-STD 881	
Reporting Format	X12 or Contractor Format	UN/CEFACT	DOD Approved XML Guideline	DoD Approved XML Guideline
- 4- 4				
Cost/Sched Integ.	CPR DID shall be used in	Joint IPMR DID (merged CPR and	, <u> </u>	Joint IPMR DID (merged CPR and
	conjunction with the Integrated	IMS)	IMS)	IMS)
	Master Schedule			
	(IMS) DID, DI-MGMT-81650			
Variance Analysis	Explain all variances that exceed	Top 15	Top 15	Top 15
	specified variance thresholds			



DID Topical Matrix by Format

Ву	Format	

Format 1

Format 2

Format 3

Format 4

Format 5

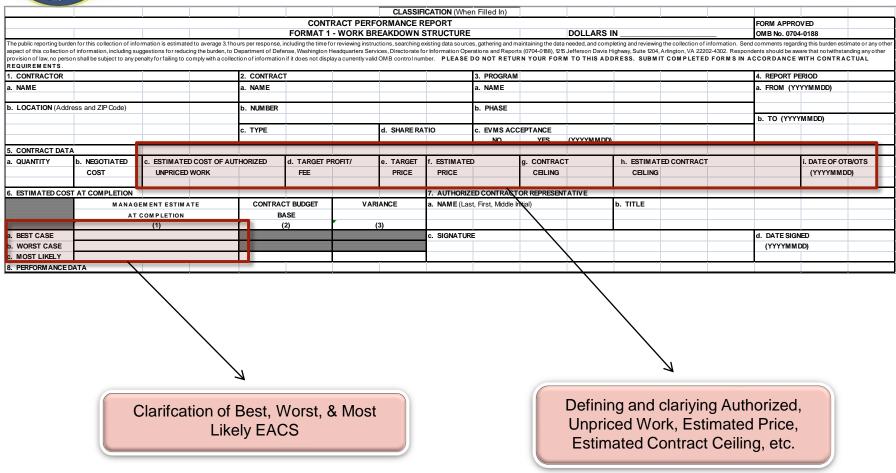
Format 6

Format 7

2005	Oct 2012	Feb-Apr 2012	Jun 2012				
No descope discussion	No format change; definitional	No format change; definitional	No format change; definitional				
	and clarification items for EACs,	and clarification items for EACs,	and clarification items for EACs,				
	AUW, etc.	AUW, etc.	AUW, etc.				
	Definitions consistent with	Definitions consistent with	Definitions consistent with				
	Format 1	Format 1	Format 1				
Greyed changes section	Add total line (row) to Format	"Un-gray" of monthly changes; removed total line	"Un-gray" of monthly changes				
	No format change; option hours	No format change, option hours	No format change, option hours				
	or EQH	or EQH	or EQH				
	Revised Structure, linked IMS	Revised Structure, Enhanced	Revised Structure, Enhanced				
		Schedule Reporting	Schedule Reporting				
New in 2005	Various definitions, terms, and	Various definitions, terms, and	Various definitions, terms, and				
	clarifications added, Justify	clarifications added, Justify	clarifications added, Justify Late				
	Relationships, Constraints, Lags	Relationships, Constraints, Lags	and some early Constraints,				
			Lags, Schedule Margin clarified				
ACAT 1 CR History File	ACAT 1 CR History File	Format 7 added; history and	Format 7 added; history and				
		timephased info at CA level	timephased info Format 1 level				

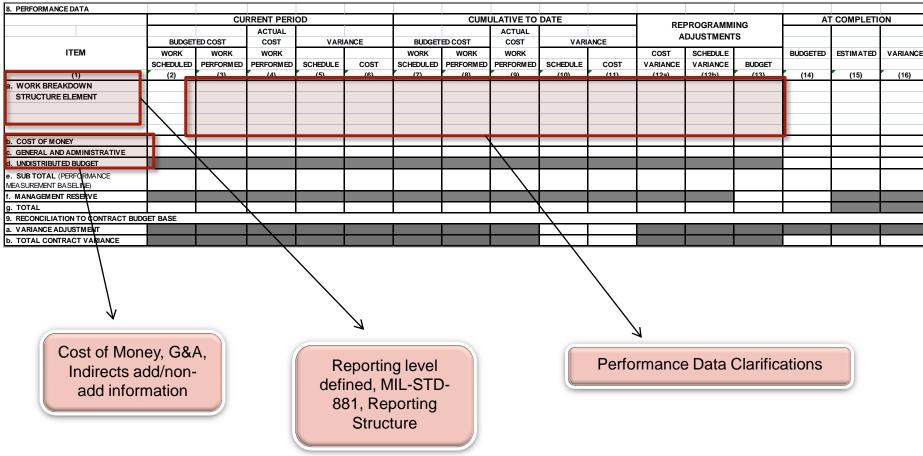


Format 1 Header





Format 1 Body





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b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
C. TOTAL BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
d. PERFORMANCE MEASUREMENT BASELINE (End of Period)															
7. MANAGEMENT RESERVE															
. TOTAL															

Planned,
Estimated and
Contract
Completion Dates
clarifications; link
to Format 6

Requirement for baseline changes by Month to be displayed



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Major Changes:

- Top 15 WBS approach to Variance Analysis
 - Allowed for Government Selection or a defined contractor process that covers all aspects (current, cumulative and at-complete)
 - Allowed contractor or government to temporarily increase the number of reported variances to cover emerging trends
- Linked Formats 1-4 and 6 discussions to format 5
 - Significant Format 6 changes. Require SRA, Health Assessment and drivers as applicable be put into the Format 5
- Requirement to reconcile best/worst/most likely EAC
- Other Information
 - Contractor format for delivery
 - Delivered with the monthly Formats 1-4, & 6



Major Changes:

- Defined minimum level of subcontractor integration in Prime IMS
- Definition of Schedule Margin & SVTs included
- Required disclosing of justification for Leads, Lags and most constraints.
- Defined minimum fields in IMS
- Expanded when SRA is required and how it is reported

Other Information

- IMS required monthly to the PMO & EVM-CR for ACAT I's
- Consistency with Format 1 Addressed; included "The WBS numbering system in the IMS must be consistent with the Format 1 structure."



IMS Field List Comparison

Task Name Start Finish Miles Compl Du	r Early Start Finish Start Finish Start Finish Start Finish Start Float Float	ccesso Contro Rdur Rdur Criti Constraint Type Date	Just Lag Just Sub I OBS Work PC EVT WBC Driving Constra Sub I OBS Work PC EVT WBC Path
Sample Program Ion 8/29/1 se 12/17/ Ilo 0% 5i	75 d ####### ####### ####### Mon 8/29/ Tue 12/1 0 d 0 d	0 d 0 d Yes as Soon As Possible II	
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Common in 2005 IMS DID & IPMR DID

- 1. Task Name
- 2. Start
- 3. Finish
- 4. Milestone
- 5. % Complete
- 6. Duration
- 7. Early Start
- 8. Early Finish
- 9. Late Start
- 10.Late Finish
- 11. Baseline Start 22. Constraint Date

- 12. Baseline Finish
- 13. Total Float
- 14. Free Float
- 15. Successors
- 16. Predecessors
- 17. Control Account
- 18. Minimum Rdur (Optimistic Duration)
- 19. Maximum Rdur (Pessimistic Duration)
- 20. Critical Path
- 21. Constraint Type

New To IPMR DID

- 1. Justify Lag
- 2. Justify Constraint
- 3. Sub ID
- 4. OBS
- 5. Work Package
- 6. EVT
- **7. WBS**
- 8. Driving Path



- ▶ Not part of 2005 IMS or CPR DID
 - Replaces EVM-CR required history file
 - Provides time-phased BCWS, BCWP, ACWP, ETC from contract award to completion as applicable.
 - Must reconcile with Format 1 BAC and EAC for the same period.
 - Due as a minimum annually, at the same time in the month as the other formats.
 - At the same reporting level as Format I unless otherwise negotiated.
 - Supported by it's own DoD approved XML Schema and guideline.



- Guide published to enhance and clarify information in the DID.
- Does not add new requirements.
- Found on the PARCA EVM website:
 - http://www.acq.osd.mil/evm/docs/IPMR%20Implementation%20Gde%2031
 Jul12.pdf
- Will coincide with a OSD IPMR CDRL template in the future.



References

- 1. PARCA Website: http://www.acq.osd.mil/parca/
- PARCA EVM Website: http://www.acq.osd.mil/evm/
- PARCA EVM Issue & Interpretation: http://www.acq.osd.mil/evm/ir/index.shtml
- 4. EVM-CR Website: http://dcarc.cape.osd.mil/EVM/EVMOverview.aspx
- DAU EVM Community Of Practice (COP) Website: https://dap.dau.mil/cop/evm/Pages/default.aspx
- DCMA EVMS Standard Surveillance Instruction (SSI): http://guidebook.dcma.mil/79/index.cfm
- 7. DFARS
 - Notice of Earned Value Management System (Apr 2008):
 http://www.acq.osd.mil/dpap/dars/dfars/html/current/252234.htm#252.234-7001
 - Earned Value Management System (May 2011):
 http://www.acq.osd.mil/dpap/dars/dfars/html/current/252234.htm#252.234-7002
 - Contractor Business Systems (May 2011):
 http://www.acq.osd.mil/dpap/dars/dfars/html/current/252242.htm#252.242-7005
- 8. IPMR: https://assist.dla.mil/quicksearch/basic_profile.cfm?ident_number=278901