### **EVMS Training Snippet Library:**

# Contract Performance Report (CPR) / Integrated Program Management Report (IPMR): Purpose and Uses



Office of Acquisition and Project Management (OAPM) MA-60
U. S. Department of Energy
July 2014

## **CPR / IPMR Overview**

- CPR Data Item Description DI-MGMT-81466A
- IPMR Data Item Description DI-MGMT-81861
- Required when ANSI/EIA-748 is required
- CPR has 5 Formats; IPMR has 7 Formats (Formats 1 through 5 are same in CPR and IPMR)
  - Format 1: Current, Cumulative, At-Complete EV by WBS
  - Format 2: Same as Format 1 except by OBS
  - Format 3: Timephased baseline changes and OTB info
  - Format 4: Timephased forecast staffing
  - Format 5: Explanations and Problem Analyses
  - Format 6: Integrated Master Schedule (IMS)
  - Format 7: Electronic History and Forecast File

# Format 1 – Work Breakdown Structure



#### Format 1 content

- Performance data (BCWS, BCWP and ACWP) by reporting WBS
- Current reporting period and cumulative to date
- Cost and schedule variances
- Identifies any reprogramming adjustments, the Budget at Completion (BAC), the Estimate at Completion (EAC), and the Variance at Completion (VAC) by WBS element
- Reports management reserve (MR) and undistributed budget (UB)
- Indirect costs if required

# Format 1 – Work Breakdown Structure



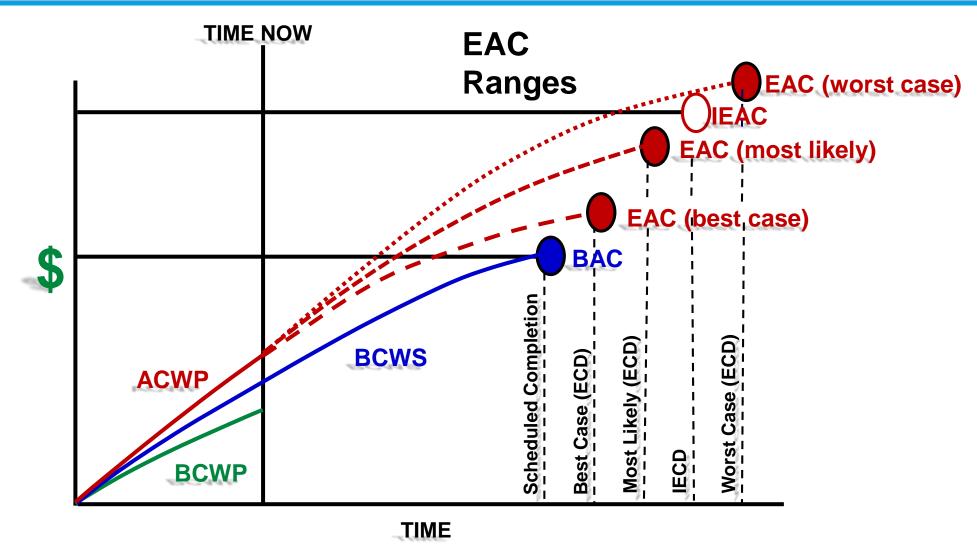
- Isolate key cost and schedule variances
- Quantify the impact
- Performance analysis
- Project future performance
- Serves as the basis for most performance indices used in analysis
  - SV, CV, SPI, CPI, TCPI
- Provides for reporting of Over Target Baseline



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# **Contractor EAC Ranges**





# Format 2 – Organizational Breakdown Structure

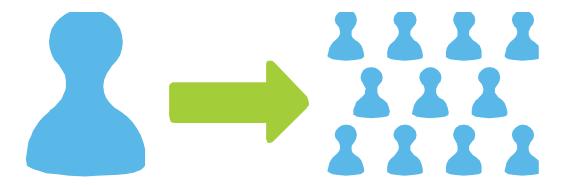


### Format 2 content

- -Same data as Format 1
- By Organizational Breakdown Structure elements or by Integrated Project Teams (IPTs)
- Major subcontractors and material reported separately

### Purpose

- Provides for analysis based on these elements



#### Page 8

# Format 2 – Organizational Categories



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# Format 3 – Baseline



#### Format 3 content

- Time-phased Performance Measurement Baseline (PMB)
- Baseline changes
- Contract Budget Base, Total Allocated Budget, Management Reserve, Undistributed Budget
- Completion dates

- Shows shifts in the PMB
- Analysis focuses on
  - Distribution of cost for authorized changes to PMB
  - Baseline churn (see PARS II Baseline Volatility Report)

# Format 3 - Baseline



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FORMAT 3 - BASELINE Dollars IN													OMB No. 0704-0188					
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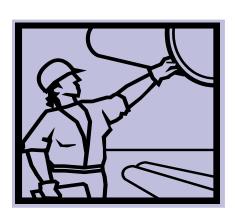
# Format 4 - Staffing

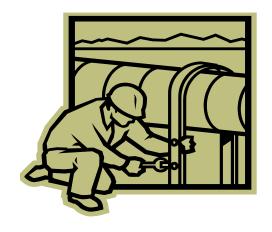
#### Format 4 content

Staffing forecasts by organizational elements

- Correlate time-phased staffing to major milestones
- Identifies accuracy of labor estimates
- Analyze projected staffing levels with scheduled activities







# Format 4 - Staffing

6. TOTAL DIRECT



PENDING UPDATE TO

FORMAT 4 - STAFFING (BAC EQP)													OMB No. 0704-0188			
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comments regarding this burden estim	ate or any other asp	ect of this collec	tion of informat	ion, including su	ggestions for re	ducing the burde	n, to Departme	nt of Defense, W	ashington Head	lquarters Services,	Directorate for I	nformation Oper	ations and Rep	oorts (0704-0188), 1215 Jefferson Davis Highway		
Suite 1204, Arlington, VA 22202-4302.	Respondents should	be aware that n	otwithstanding	any other provis	ion of law, no p	erson shall be su	bject to any pe	nalty for failing to	comply with a	collection of inform	nation if it does r	ot display a curr	ently valid OM	B control number. PLEASE DO NOT RETURN YOUR		
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INTEGRATED PROGRAM MANAGEMENT REPORT

# IPMR Format 5 – Explanations and Problem Analyses



- 1. Contract Summary
- 2. Formal Reprogramming Analysis
- 3. EAC Analysis
- 4. UB Analysis
- 5. MR Analysis
- 6. IMS Discussion
- 7. Format 3 Discussion
- 8. Format 4 Discussion
- 9. Cost and Schedule Variance Analysis
- 10. Supplemental Discussions

Note: CPR Format 5 requirements are basically the same; except for the IMS Discussion

# IPMR Format 6 – Integrated Master Schedule (IMS)



#### Content

- Single integrated network schedule of discrete tasks/activities consistent with authorized work
- Earned Value Technique
- Relationship and float requirements

- Used to schedule the project and determine the Critical Path
- Contains both the baseline and forecast schedules and predicts the project completion date and all interim milestones

# IPMR Format 7 – Electronic History and Forecast File



#### • Content:

- Historical time-phased actual costs (ACWP)
- Future time-phased Estimate to Complete (ETC)
- All WBS elements
- Must reconcile with Format 1 Block 8 Column (15) Estimate at Completion (EAC) for same reporting month

- Provides supplemental historical and time-phased cost information, by WBS, at the same level as Format 1
- Electronic submission to PARS II, DOE's central repository

# **DOE OAPM EVM Home Page**



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#### **EARNED VALUE MANAGEMENT**

**Aviation Management** Executive Correspondence Energy Reduction at HQ Facilities and Infrastructure Freedom of Information Act Financial Assistance Information Systems Procurement and Acquisition Earned Value Lessons Learned Reviews and

Validations

Publications

Earned Value Management (EVM) is a systematic approach to the integration and measurement of cost, schedule, and technical (scope) accomplishments on a project or task. It provides both the government and contractors the ability to examine detailed schedule information, critical program and technical milestones, and cost data.

- EVMS Surveillance Standard Operating Procedure (ESSOP) 26 Sep 2011 (pdf)
  - EV Guideline Assessment Templates (MS Word)
  - DOE EVMS Cross Reference Checklist (pdf)
  - DOE EVMS Risk Assessment Matrix (MS Word)
- · Formulas and Terminology "Gold Card" Sep 2011 (pdf)
- . Slides from the OECM Road Show: Earned Value (EV) Analysis and Project Assessment & Reporting System (PARS II) May 2012 (pdf)
- DOE EVM Guidance

#### **EVM TUTORIALS**

Module 1 - Introduction to Earned Value (pdf 446.86 kb) July 17, 2003

This module is the introduction to a series of online tutorials designed to enhance your understanding of Earned Value Management. This module's objective is to introduce you to Earned Value and outline the blueprint for the succeeding modules. This module defines Earned Value management. It looks at the differences between Traditional management and Earned Value management, examines how Earned Value management fits into a program and project environment, and defines the framework necessary for proper Earned Value management implementation.

http://energy.gov/management/office-management/operational-management/project-management/earned-value-management

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