

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 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 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



- **Purpose**

- 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

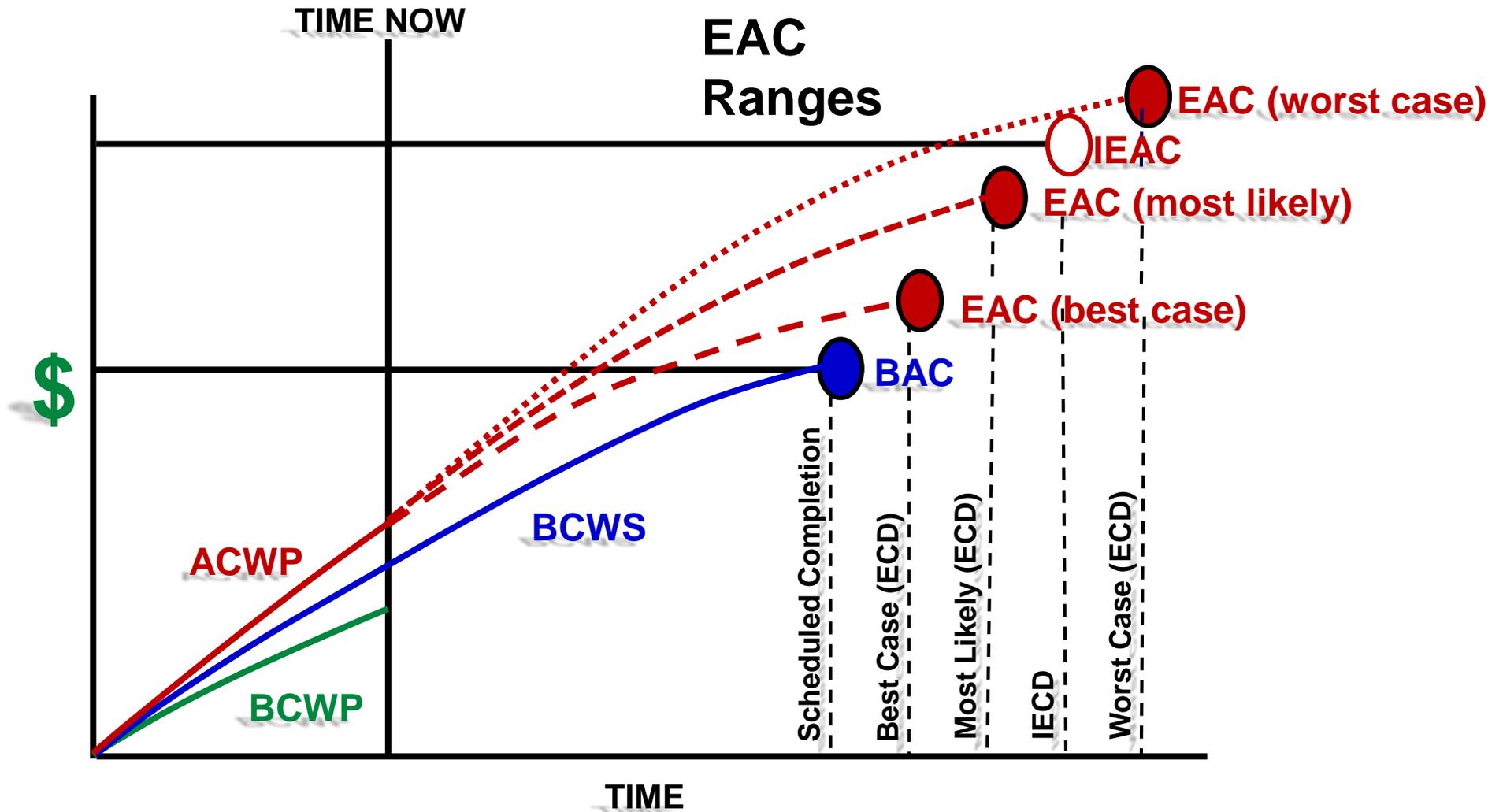
Format 1 – Work Breakdown Structure



INTEGRATED PROGRAM MANAGEMENT REPORT FORMAT 1 - WORK BREAKDOWN STRUCTURE											Dollars IN _____			PENDING UPDATE TO OMB No. 0704-0188					
<small>The public reporting burden for this collection of information is estimated to average 3.1 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.</small>																			
1. CONTRACT				2. CONTRACT				3. PROGRAM				4. REPORT PERIOD							
a. NAME				a. NAME				a. NAME				a. FROM (YYYYMMDD)							
b. LOCATION (Address and ZIP Code)				b. NUMBER				b. PHASE				b. TO (YYYYMMDD)							
				c. TYPE		d. SHARE RATIO		c. EVMS ACCEPTANCE NO YES (YYYYMMDD)											
5. CONTRACT DATA																			
a. QUANTITY		b. NEGOTIATED COST		c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK				d. TARGET PROFIT / FEE		e. TARGET PRICE		f. ESTIMATED PRICE		g. CONTRACT CEILING		h. ESTIMATED CONTRACT CEILING		i. DATE OF OTB/OTS (YYYYMMDD)	
6. ESTIMATED COST AT COMPLETION																			
MANAGEMENT ESTIMATE AT COMPLETION (1)				CONTRACT BUDGET BASE (2)		VARIANCE (3)		7. AUTHORIZED CONTRACTOR REPRESENTATIVE											
a. BEST CASE								a. NAME (Last, First, Middle Initial)				b. TITLE							
b. WORST CASE								c. SIGNATURE				d. DATE SIGNED (YYYYMMDD)							
c. MOST LIKE																			
8. PERFORMANCE DATA																			
ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION					
	BUDGETED COST		ACTUAL COST	VARIANCE		BUDGETED COST		ACTUAL COST	VARIANCE		COST VARIANCE	SCHEDULE VARIANCE	BUDGET	BUDGETED	ESTIMATED	VARIANCE			
	WORK SCHEDULED (2)	WORK PERFORMED (3)	WORK PERFORMED (4)	SCHEDULE (5)	COST (6)	WORK SCHEDULED (7)	WORK PERFORMED (8)	WORK PERFORMED (9)	SCHEDULE (10)	COST (11)	(12a)	(12b)	(13)	(14)	(15)	(16)			
a. WORK BREAKDOWN STRUCTURE ELEMENT																			
b. COST OF MONEY																			
c. GENERAL AND ADMINISTRATIVE *																			
d. UNDISTRIBUTED BUDGET																			
e. SUB TOTAL (Performance Measurement Baseline)																			
f. MANAGEMENT RESERVE																			
g. TOTAL																			
9. RECONCILIATION TO CONTRACT BUDGET BASE																			
a. VARIANCE ADJUSTMENT																			
b. TOTAL CONTRACT VARIANCE																			



Contractor EAC Ranges



Format 2 – Organizational Breakdown Structure

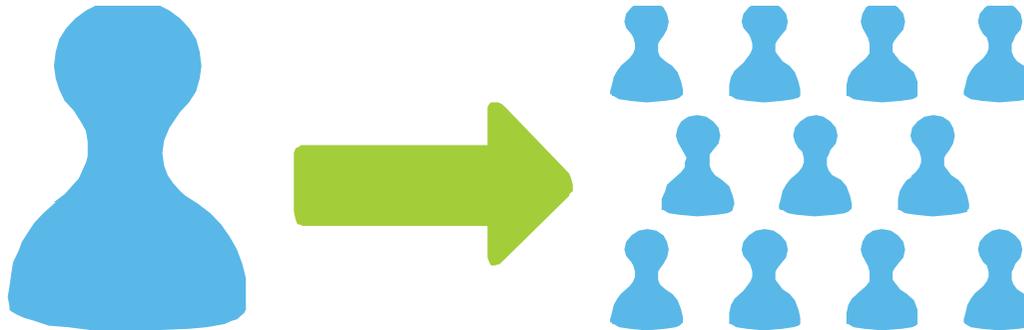


- **Format 2 content**

- 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





- **Format 3 content**

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

- **Purpose**

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

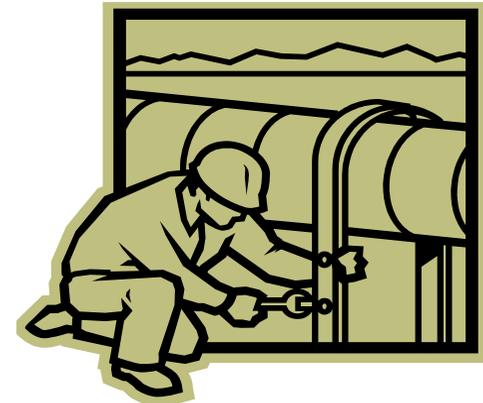
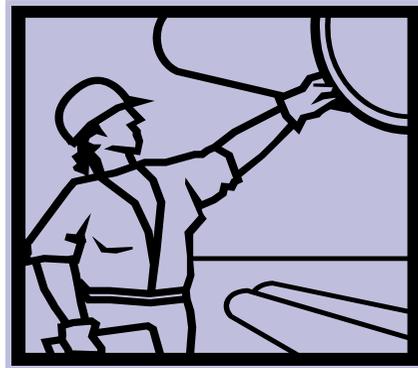
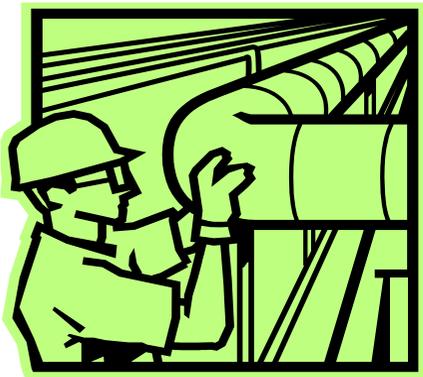
Format 3 - Baseline



INTEGRATED PROGRAM MANAGEMENT REPORT													PENDING UPDATE TO			
FORMAT 3 - BASELINE													OMB No. 0704-0188			
Dollars IN _____																
The public reporting burden for this collection of information is estimated to average 6.3 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.																
1. CONTRACTOR			2. CONTRACT				3. PROGRAM				4. REPORT PERIOD					
a. NAME			a. NAME				a. NAME				a. FROM (YYYYMMDD)					
b. LOCATION (Address and ZIP Code)			b. NUMBER				b. PHASE				b. TO (YYYYMMDD)					
			c. TYPE		d. SHARE RATIO		c. EVMS ACCEPTANCE NO YES (YYYYMMDD)									
5. CONTRACT DATA																
a. ORIGINAL NEGOTIATED COST			b. NEGOTIATED CONTRACT CHANGES		c. CURRENT NEGOTIATED COST (a. + b.)		d. ESTIMATED COST OF AUTHORIZED UNPRICED WORK		e. CONTRACT BUDGET BASE (c. + d.)		f. TOTAL ALLOCATED BUDGET		g. DIFFERENCE (e. - f.)			
h. CONTRACT START DATE (YYYYMMDD)			i. CONTRACT DEFINITIZATION DATE (YYYYMMDD)			j. PLANNED COMPLETION DATE (YYYYMMDD)			k. CONTRACT COMPLETION DATE (YYYYMMDD)			l. ESTIMATED COMPLETION DATE (YYYYMMDD)				
6. PERFORMANCE DATA																
ITEM (1)	BCWS CUMULATIVE TO DATE (2)	BCWS FOR REPORT PERIOD (3)	BUDGETED COST FOR WORK SCHEDULED (BCWS) (Non-Cumulative)												UNDIS-TRIBUTED BUDGET (15)	TOTAL (16)
			SIX MONTH FORECAST						ENTER SPECIFIED PERIODS							
			+1 JAN (4)	+2 FEB (5)	+3 MAR (6)	+4 APR (7)	+5 MAY (8)	+6 JUN (9)	+7 Jul (10)	+8 Aug (11)	+9 Sep (12)	+12 Oct-Dec (13)	+13 TC (14)			
a. PERFORMANCE MEASUREMENT BASELINE (Beginning of Period)																
b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD																
c. PERFORMANCE MEASUREMENT BASELINE (End of Period)																
8. TOTAL																



- **Format 4 content**
 - Staffing forecasts by organizational elements
- **Purpose**
 - Correlate time-phased staffing to major milestones
 - Identifies accuracy of labor estimates
 - Analyze projected staffing levels with scheduled activities



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

- **Purpose**

- 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

- **Purpose:**

- 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**



Home » Operational Management » Project Management » Earned Value Management

EARNED VALUE MANAGEMENT

- Aviation Management
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- Energy Reduction at HQ
- Facilities and Infrastructure
- Freedom of Information Act
- Financial Assistance
- Information Systems
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- Project Management
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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>

Career Development Program

Real Estate

History