

Samos Advisors LLC White Paper: The Earned Value Management System (EVMS) Roadmap

INTRODUCTION

Samos Advisors is a leader in the design, development, implementation and operation of Electronic Industries Alliance (EIA) - 748 compliant Earned Value Management System (EVMS).

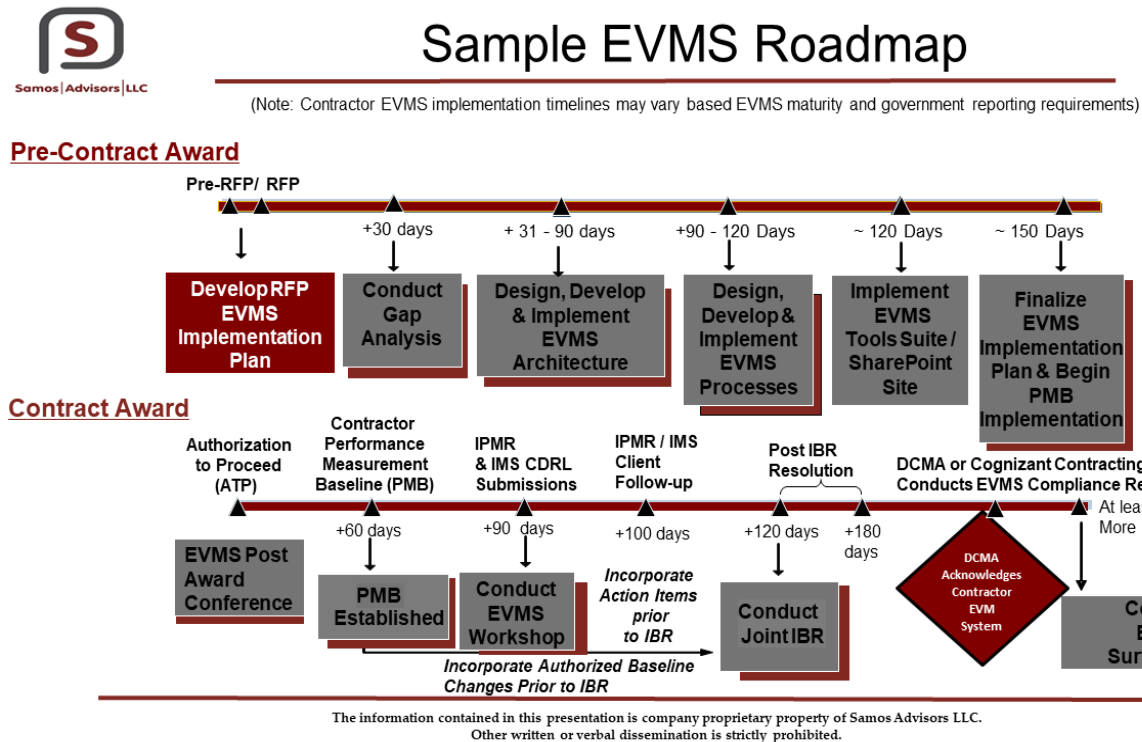
Our products and services are tailored to meet a client’s needs for a range of EVMS activities. These include EVMS proposal development, process design, baseline implementation, data analysis and reporting, conduct of Integrated Baseline Reviews (IBR), EVMS surveillances and certification reviews, EVMS focal point duties and training.

With more than thirty years of success in government and industry, Samos Advisors enables the design, development and deployment of strategies needed to successfully integrate EVMS into a company’s project planning, project management, and project control processes.

THE EVMS ROADMAP

The first step is developing an EVMS roadmap. Whether seeking EVMS certification, success in internal/external reviews or a culture change, the EVMS Roadmap is used to develop strategies to enable an EVMS-savvy workforce.

The Roadmap identifies what is needed to implement and maintain EVMS processes that are both practical and practiced. Samos Advisors does this by designing, delivering and monitoring EVMS processes that respond to the way business is done while satisfying the criteria contained in the EIA-748 EVMS Standard.





EVM ENGAGEMENTS

Our engagements are structured to assure our client’s full compliance with EIA-748, Standards for Earned Value Management and assure full compliance with contract and reporting requirements commonly associated with EVMS.

Aligned with the EIA-748 and used to document corporate procedures, a company’s System Description contains the overarching policies governing a company’s EVMS practices. EVMS governing practices are divided into organization; planning, scheduling and budgeting; accounting for cost; data analysis and reporting, subcontract management, and baseline change control.

EVM services are commonly delivered on the client’s work site and packaged to address following focus areas:

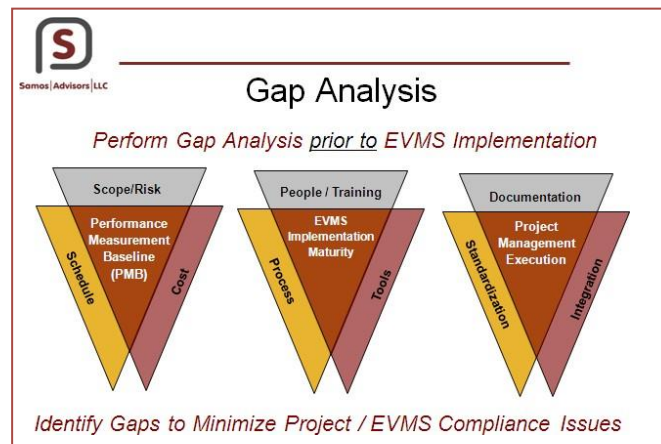
EVMS Architecture, Process Development and Implementation. Implementation is at the forefront of contract compliance and generally begins with a compliant Systems Description. Samos Advisors is a leader in developing contract compliant policies for companies new to EVMS companies needing to restate an existing System Description to improve operations, comply with new processes or address the requirements associated with recently acquired tools.

After contract award, we support our clients in implementing the PMB (a.k.a. technical, schedule and cost baseline) and prepare clients for the Integrated Baseline Review (IBR) and government mandated EVMS reviews (e.g., IBR, EVMS Compliance or Certification).

EVMS process development and implementation begins with a Gap Analysis. The Gap Analysis is a recommended first step for companies starting with a blank-page. A Gap Analysis reviews existing program management processes to assess compliance with the standards contained in the EIA-748 EVMS Standard.

Based on the findings and recommendations of the Gap Analysis, it may be necessary to draft new procedures or modify existing processes to address conflicts between what is required in the EIA-748 and the way by work is being performed.

Using a Gap Analysis, Samos Advisors confirms the viability of EVMS processes for companies with an existing EVM System Description. EVMS process compliance is reviewed to ensure day-to-day project management activities support the tools being used for integration of cost, schedule and performance planning and control. If disconnects exist between requirements, process and/or tools, Samos Advisors documents the finding, recommends corrective actions and assists in implementing an EVMS that fully supports EIA-748.



Developing/Implementing Project-Unique Procedures. A Gap Analysis is also used to assure our clients have documented and realistic project-unique procedures in place that supplement the Systems Description. Our Gap Analysis includes the review of EVMS system architecture, tools and project procedures to make certain lower level procedures support the System Description and the EIA-748 EVMS Standard. Also, part of the Gap Analysis is a review to assure our client’s project procedures are being followed by every member of the project team.

The Gap Analysis is a value-rich activity used to make certain a client’s EVMS and all subordinate processes align with the requirements of the EIA-748 and support the way work is being done.

Whether starting with a blank-page or with an existing EVM Systems Description, Samos Advisors is there to assure our client's processes and day-to-day operations are and remain fully compliant with EIA-748.

Successful EVMS Reviews. Samos Advisors is a project partner who assures our clients' success throughout the EVMS review process. We make certain the right methods and disciplines are put into place to assure our clients are prepared for the reviews commonly associated with EVMS, project planning and project control.

- **Integrated Baseline Review.** An Integrated Baseline Review (IBR) is a formal review conducted by the government program manager and technical staff, jointly with their contractor counterparts, following contract award to verify the technical content of the EVMS Performance Measurement Baseline (PMB), the accuracy of the related resources and schedules.

The IBR verifies the technical content and the realism of the related performance budgets, resources, and schedules. It should provide a mutual understanding of the inherent risks in planning and the underlying management control systems. The IBR may produce general or specific findings that must be corrected in a timely manner.

IBR's are commonly conducted shortly after the PMB is put into place. However, an IBR may occur throughout the life of the project depending on factors such as PMB stability, personnel turnover or significant budget change.

Our Advisors facilitate the development of a PMB that assures the contract Statement of Work is properly subdivided into manageable efforts, work authorizations represent achievable outcomes and schedules are vertically and horizontally integrated for creating a project's critical path. We also support the client development of the risk management processes.

Samos Advisors works with the entire project management team to define, technical, schedule and budget project tasks. Samos Advisors facilitates IBR success by assuring the PMB presents a realistic plan that project management teams understand and can manage. The result is a PMB that is ready for the IBR.

Samos Advisors is also available after the IBR to facilitate the timely closure of any open actions.

- **Joint Surveillance Review.** A company's System Description is a living document and is subject to Joint Surveillance Reviews (JSR) by government agencies to assure the continued compliance with the intent of the EIA-748 EVMS Standard.

It is not uncommon that existing processes documented in a client's System Description are written but forgotten...or worse...not used. Taking their place can be ad-hoc processes or sub-processes developed by project managers, finance and others to assure specific outputs are available but not controlled and/or managed in accordance with the company EVMS policies and the EIA-748. Non-compliance EVMS modes and methods used by project managers create a risk of "garbage in/garbage out" and need to be stopped or avoided from the beginning.

Samos Advisors is available to prepare a client for the JSR. We review a client's System Description to assure continued compliance with the EIA-748 and assure project operations comply with all documented policies. This service is especially important for companies being reviewed by the Defense Contract Management Agency (DCMA) or other federal oversight where government teams conduct a JSR to assess whether a company's System Description is being followed. Samos Advisors provides an independent compliance analysis and delivers all recommendations that may be needed to assure there no major findings or contract actions result from the JSR.

- **EVMS DCMA and DOE Data Driven Compliance Reviews.** Recently, DCMA and the Department of Energy (DOE) notified their government project offices to reduce costs of unnecessary burdensome polices that will inhibit the success of future projects. As a result, the conduct of all future DCMA and DOE EVMS certification reviews meeting established reporting thresholds will use an EVMS data-driven-model for determining compliance. The intent of the EVMS data-driven model is to reduce the overall EVMS compliance time-line for industry partners for receiving EVMS certification or credentials. In addition, DCMA and DOE EVMS data-driven model focuses on systemic and re-occurring non-compliance issues. All other EVMS compliant management practices that are compliant may or may not be reviewed. Both DCMA and now DOE have established specific EVMS attributes and testing protocols (both automated and m Samos Advisors is currently supporting its EVMS clients to prepare, train, conduct round-tables working sessions and conduct project stakeholder's data-driven grey and black interviews. The results of these reviews enable Samos Advisors to assess the adequacy of contractor management processes and implementation practices by program or project management personnel.
- **Program Management and Business Management Reviews.** Samos Advisors is available to support a client's need to engage government customers during the Program Management Review (PMR) or Business Management Review (BMR). We have witnessed the importance of demonstrating the use of EVMS during the PMR and BMR. The integration of EVMS outputs during the PMR and/or BMR demonstrates a commitment to compliance with contract requirements and a disciplined use of EVMS as a part of a client's program management practices.

EVMS Proposal Consulting. Samos Advisors is a skilled provider of EVMS proposal consulting. Our technical writers have demonstrated success in competitive evaluations. We highlight our client's strengths and align those strengths with the guidelines contained in EIA-748. Whether the need is to describe how the company will comply with EIA-748 through an Executive Summary or through a comprehensive plan, Samos Advisors is ready to deliver. If the need is to propose the use of EVMS that has not yet been determined to follow EIA 748 Samos Advisors works with clients to describe the EVMS intended for use in performance of the contract.

Our Writer's assure every EVMS requirement sought by government buying offices is documented and supported with management-focused input. We assure accurate descriptions of how the proposed EVMS complies with the EVMS guidelines in EIA-748 and details any distinguishing differences between the client's existing management system and modifications proposed to meet the EVMS guidelines.

We describe your management system and its application in terms of the EVMS guidelines; the proposed procedure for administration of the EVMS guidelines as applied to subcontractors; the process used to determine subcontractor compliance with EIA-748 and milestones that indicate when the EVMS will be compliant with EIA-748. Along with these descriptions, we assure a client's EVMS plans fully comply with the contracting officer's needs for information and assistance to support review of the plan. Our bottom-line is to assure the proposal reflects YOUR commitment to the discipline and use of EVMS as part of YOUR program management process.

EVMS Training. EVMS training is at the core of our EVMS Roadmap. EVMS training serves the needs of the entire project team by advancing the understanding of EVMS principles while enabling the improved practice of EVMS protocols and production improved EVMS products.

Samos Advisors strives to deliver EVMS training through innovative deliver methods to include:

- Using the latest government and industry EVMS best practices to facilitate an understanding of a client's EVMS. To enhance the understanding of what EVMS is and how EVMS is used, to create active learning opportunities. We incorporate these best practices into EVMS learning creates opportunities for learners to improve their skills through group learning and systems thinking among the project team members.



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- Using shared vision and personal mastery to produce an EVMS-enabled workforce. Our goal is to continually clarify and deepen shared vision among the project team by providing training that integrates the day-to-day operations and tools used by the project team.
- Breaking down traditional barriers to EVM learning by moving beyond the classroom and into the workplace to deliver what's needed to successfully deliver on contract requirements and customer expectations.

EVM Tools Integration. Value-driven tools along with responsive EVM processes are building blocks of project management success. In today's super-paced business environment, corporate leaders and project managers must have and maintain a high degree of confidence in their tools and enabling processes supporting cost, schedule and technical performance planning and control.

The right tools supported by the right processes are essential factors in the formula for project management success. Companies doing business under the requirements, the performing organization must demonstrate the ability to integrate compliance with the Guidelines into their program management culture. Beyond meeting contract requirements commonly associated with the EIA-748, 32 EVMS Guidelines, the right tools and the right processes demonstrate a commitment and ability to plan, budget, analyze, forecast, and report project performance.

EVMS Corporate Strategy and Focal Points: In today's complex government project environment, Samos Advisors designs and develops corporate EVMS strategies for either less complex or complex program or project environments. We develop EVMS strategies along-side client stakeholders to incorporate existing management processes. We offer to develop EVMS plans and schedules, roadmaps, and training to meet today's EVMS Challenges either at the corporate or local program level. As required, Samos Advisors can act as a temporary EVMS corporate on a monthly service subscription basis.

Next Step

Whether operating as a prime or a subcontractor, the overarching need is to demonstrate the use of EVM as part of your project management processes along with the integration of value-driven tools.

The next step in building the EVM roadmap is to engage in a dialogue to identify what's needed and how Samos Advisors can help deliver success. Call Samos Advisors today for a free EVMS consultation.

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