



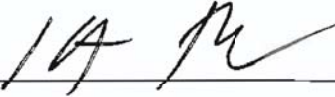

Project Management Office

Title:

PMO-1.10 Surveillance Plan

Section where used:

Project Management

Prepared by	Date	Approved by	Date
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LIST OF ACRONYMS

ANSI/EIA	American National Standards Institute/Electronics Industrial Alliance
CA	Control Account
CAM	Control Account Manager
CBB	Contract Budget Baseline
CPR	Contract Performance Report
CWBS	Contractor Work Breakdown Structure
DCAA	Defense Contract Audit Agency
DCMA	Defense Contract Management Agency
EAC	Estimate at Completion
EVMS	Earned Value Management System
LBNL	Lawrence Berkeley National Laboratory
MR	Management Reserve
NDIA	National Defense Industrial Association
OBS	Organization Breakdown Structure
PMB	Performance Measurement Baseline
PMO	Project Management Office
PMSC	Program Management Systems Committee
RAM	Responsibility Assignment Matrix
SOW	Statement of Work
UB	Undistributed Budget
WBS	Work Breakdown Structure
WBS/OBS	Work Breakdown Structure/Organization Breakdown Structure

Section 1

Introduction

1.1 LBNL EVMS SURVEILLANCE OVERVIEW

The Lawrence Berkeley National Laboratory (LBNL) EVMS Surveillance Plan provides guidance and defines the procedure to review and evaluate the health of EVMS implementation at LBNL. The goal of EVMS surveillance is twofold. First, it ensures that LBNL's EVMS processes and procedures are followed appropriately. Second, it confirms that they continue to satisfy the guidelines as set by the American National Standards Institute/Electronic Industry Alliance's (ANSI/EIA) 748 Standard for Earned Value Management Systems.

An overview of the surveillance process includes:

- Organization
- Planning
- Execution
- Results
- Management Control and Corrective Action

1.2 PURPOSE OF THE PLAN

The LBNL EVMS Surveillance Plan is based upon the NDIA Surveillance guide, and is consistent with the standard industry surveillance approach. Using a standardized approach ensures a common understanding of expectations, encourages efficiencies through the use of a uniform process, and gives consistent guidance for the implementation of the ANSI/EIA 748 EVMS guidelines. The LBNL Project management Office (PMO) recommends that this surveillance plan be utilized to guide all EVMS reviews for all projects that require the use of EVM at LBNL.

1.3 DEFINITIONS USED WITHIN THE GUIDE

<i>Approved System</i>	Refers to the certified LBNL EVM system as described in LBID-2570, Lawrence Berkeley National Laboratory Earned Value Management System (LBNL EVMS) Description
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<i>Customer</i>	The organization or entity, either internal to a company or external to it, for which one or more projects are being executed. Typically, the external customer is DOE or another government agency
<i>EVMS</i>	A set of integrated management practices, policies, and data required to successfully implement EVM.
<i>EVMS Guidelines</i>	The 32 EVMS guidelines contained in American National Standards Institute/Electronics Industrial Alliance (ANSI/EIA) 748 - Current Version, Earned Value Management Systems.
<i>EVMS Team Leader</i>	The EVMS Team Leader leads and coordinates the EVMS Review Team. The Team Leader also is responsible to approve the final EVMS Review Report. The EVMS Team Leader is selected by the PMO.
<i>Joint Surveillance</i>	Project surveillance conducted by LBNL and the customer together in the same review.
<i>Performance Measurement Baseline (PMB)</i>	The schedule and resource baseline established after contract award or supplemental agreement that becomes the basis for earned value status assessment.
<i>Project</i>	A planned effort to achieve an outcome, the progress toward which is discretely measurable.
<i>Project Surveillance</i>	The process of reviewing an individual project's application of the LBNL approved EVMS processes.
<i>Supplier</i>	An organization or entity, either internal to a company or external to it, from which goods or services are required to complete a project. Typically, suppliers are subcontractors or sub-tier contractors.
<i>System Surveillance</i>	Cross-project EVMS surveillance used to assess the capability to achieve the ANSI/EIA 748 current version guidelines. Note: System surveillance may be a summarization of the individual project's surveillance results rather than separate surveillance reviews.

Section 2

LBNL Applicable Documents

The LBNL follows the requirements in the DOE Order-413.3A, Program and Project Management for the Acquisition of Capital Assets. LBNL's Earned Value Management System (EVMS) process and organization was certified in January 2006 to comply with the American National Standards Institute (ANSI)/Electronic Industries Alliance (EIA) Standard 748- Earned Value Management Systems The LBNL EVMS is a key component of the organization, methods, and procedures adopted by LBNL to ensure that its projects are properly executed. In addition to the LBNL EVMS System Description, a set of LBNL Project Management Office (PMO) procedures have been developed and will be used for the management of the projects utilizing EVMS. The documents used in the surveillance process are:

- PMO-LBID-2570 Lawrence Berkeley National Laboratory Earned Value Management System (LBNL EVMS) Description
- PMO-1.0 Preparation & Control of Project Management Office Procedure's
- PMO-1.1 Project Plan
- PMO-1.2 Project Work Breakdown Structure (WBS)
- PMO-1.3 Project Organizational Breakdown Structure (OBS)
- PMO-1.4 Control Accounts, Work Packages & Planning Packages
- PMO-1.5 Control Account Plan/ Work Authorization
- PMO-1.6 Project Schedule
- PMO-1.7 Cost Estimating
- PMO-1.8 Monthly Status/ Reporting
- PMO-1.9 Change Control
- PMO-1.10 LBNL Earned Value Management System Surveillance Plan

These procedures provide the basis and this document provides guidance for performance of the LBNL EVMS Surveillance Review.

Section 3

LBNL EVMS CHARTER

To effectively assess the continued application of EVMS guidelines, the LBNL Project Management Office (PMO) is designated with the authority and the responsibility for oversight of EVMS surveillance.

3.1 LBNL PROJECT MANAGEMENT OFFICE

The LBNL PMO is responsible for the Charter and the development, implementation, review and assessment of the LBNL EVMS Surveillance process. Independence ensures that findings will be objective and that systemic issues at the programmatic levels will be identified. The PMO has sufficient authority to resolve issues.

3.2 DEFINE THE PMO EVMS SURVEILLANCE CHARTER

The LBNL EVMS Surveillance Charter documents the PMO's role, responsibilities, resolution processes, and membership. The PMO is designated as the owner of the LBNL EVMS Surveillance process as well as the LBNL EVMS itself.

Responsibilities of the PMO include:

- Developing institutional wide surveillance plan
- Appointing a team leader for each project surveillance reviews
- Assigning resources to the surveillance reviews
- Communicating the results of the surveillance
- Tracking surveillance corrective actions to closure
- Developing and maintaining a process for identifying issues and corrective actions
- Recommending or implementing EVMS process and training changes to correct systemic findings

3.3 DEFINE THE EVMS SURVEILLANCE MEMBERS

The PMO will staff each LBNL EVMS Surveillance Team with review members that will be responsible for surveillance in a manner that is consistent with its chartered responsibilities. The LBNL EVMS Surveillance Team has the following key attributes:

- Multiple-disciplinary knowledge and experience
- Practical experience using EVMS
- Good relations with external and internal customers

- Strong support of EVMS compliance

The PMO is responsible for surveillance reviews across multiple projects. Members of the LBNL EVMS Surveillance Team must be knowledgeable and experienced with the processes as defined in the LBNL EVMS documentation. Understanding the relationship of the EVMS guidelines to LBNL processes is vital to ensuring that unforeseen loopholes in LBNL processes do not allow practices which conflict with the intent of the EVMS guidelines.

Understanding customer perspectives is also crucial. Effective communication will involve bringing both perspectives together to ensure a logical, practical program implementation within EVMS guidelines.

3.4 DEFINING THE AGENDA OF THE REVIEW

The PMO will provide a simple surveillance review agenda to the project(s) being evaluated. The Agenda will contain the following information:

- Project(s) Evaluated
- Date(s) of Surveillance;
- EVMS Surveillance Team Membership;
- Methodologies
- Detailed Agenda and plan of the day(s)

Appendix “A” represents a typical agenda which will be distributed to the Project Team at least one month prior to the scheduled EVMS Review.

Section 4

Annual Surveillance Planning

4.1 THE SURVEILLANCE APPROACH

The LBNL EVMS Surveillance approach is documented in this EVMS Surveillance Plan. The plan will be reviewed and updated yearly and is supplemented by an annual schedule containing the projects selected for surveillance in the current year.

4.2 TYPES OF SURVEILLANCES

The two types of surveillances that will be performed by the PMO include initial EVMS compliant reviews and post acceptance reviews. Descriptions for both types of reviews are included below.

Initial EVMS Compliant Reviews

It must be demonstrated, through a compliance review, that the Earned Value data and analysis used to measure and report the project's progress are produced by an EVMS that meets the requirements of the LBNL EVMS standard. The scope of initial compliance will be based upon the requirements as defined in this document. The primary objective is to review the project's controls system and related financial areas assigned by the EVMS team leader and to determine whether the management control system complies with the EVMS guidelines in assigned areas and is properly implemented.

Post Acceptance Reviews

In addition to the initial compliance review, the PMO and the project manager will implement post acceptance reviews on an annual basis. The purpose of post acceptance reviews is to ensure that the EVMS continues to meet the requirements of LBNL applicable documents defined in Section 2. The scope and schedule of post acceptance reviews will be based upon the specific request from the EVMS team leader and project manager. The scope of the post acceptance review will be determined based on the current phase of the project.

4.3 PROCESS AND GUIDELINE SELECTION

Comprehensive surveillance addresses the full content of LBNL's EVMS description and may rely on the results of other related reviews. The LBNL EVMS self-certification is limited to projects with TPC of greater than or equal to \$20 Million and less than \$50 Million as defined in DOE Order 413.3A "Program and Project Management for the Acquisition of

Capital Assets.” The projects with a TPC greater than or equal to \$50 Million may require an ANSI/EIA-748-A-1998 compliant system certified by the Office of Engineering and Construction Management (OECM). The LBNL Surveillance Team may be used for readiness reviews prior to the OECM review.

4.4 ANNUAL PROGRAM SCHEDULE AND SELECTION

The PMO will review a list of all potential candidate projects to be surveyed. Projects are selected for surveillance based upon the project’s DOE Critical Phase and the assessment of project risk for the remainder of project work. In making the selection, all aspects of risk are considered, including:

- Cost and schedule
- Technical project size and complexity
- Stage of the project, DOE Critical Decision
- Degree of completion
- Nature of remaining work
- Past performance
- Customer concerns
- Project and site management interest or concerns

All EVMS guidelines may not be reviewed annually on all projects, but the selection process will ensure that the full range of EVMS guidelines and processes are reviewed annually over at least several projects.

Section 5

Project Surveillance Planning

5.1 TEAM MEMBERSHIP SELECTION

The LBNL EVMS Surveillance Team consists of a small number of LBNL experienced individuals, fully conversant with EVMS and the processes under review. The team leader is appointed by the PMO. To ensure independence, team members must not be individuals assigned to the project under surveillance or be in the direct line of project supervision. All internal surveillance teams must include one staff member of the PMO. Additional team members may include representatives from other projects or other locations such as other DOE laboratories. Observers may be included from both within and outside the project under surveillance to facilitate communication and early problem resolution.

5.2 PROJECT SURVEILLANCE PLANNING

Effective surveillance is planned well in advance, to ensure that it is conducted at an appropriate time in the project cycle to minimize intrusion and disruption. Written notification, including a specific request for project data, the date for submission, the agenda for the surveillance, the time and the location of the review will be provided to the appropriate project personnel. In addition, relevant customer correspondence that might provide additional insight into the health of the system may be requested.

The surveillance agenda will allow sufficient time for review of documentation, responding to project personnel and LBNL Management concerns, discussion of prior surveillance findings and of open issues (if applicable). The participants will review data prior to the actual visit in order to help the Surveillance Team better understand the project and to minimize negative impact. Documentation recommended for review includes:

- Project EVMS reports (internal, contract performance report, as applicable, for at least 2 months)
- EVMS variance analysis and corrective action
- Project schedule
- Risk management plan and risk management database
- Specific procedures for implementation of EVMS for that particular project (if any)
- Work breakdown structure/organization breakdown structure (WBS/OBS) and the related WBS dictionary
- Estimate at complete (EAC) supporting documentation
- Project/customer correspondence relating to EVMS

- Contract budget baseline (CBB), management reserve (MR), and undistributed budget (UB) log (as appropriate)
- Contract deliverables
- Responsibility assignment matrix (RAM) identifying control account managers (CAM) by work breakdown and organization structures
- Work authorization documentation
- Staffing plans
- Rate applications used
- Findings from prior reviews and status

These documents provide the surveillance team with an overview of the project's implementation of the EVMS process.

Section 6

LBNL EVMS Surveillance Execution

6.1 INTRODUCTION

Surveillance is structured to facilitate the exchange of information about the EVMS process implementation and the project's approach to it. Surveillance will be approached as a mentoring or problem-solving session rather than an audit because it not only identifies inconsistencies and the source of inconsistencies but also identifies possible solutions. For example, the team may be able to recommend successful practices used by other LBNL projects. This will be facilitated through:

- A clear code of conduct
- Understanding of how results will be used
- Including contractor and project office personnel as observers on the Surveillance Team
- Obtaining out-briefings and discussions of potential findings before a report is generated
- A clearly defined format for reporting findings and recommendations

6.2 CODE OF CONDUCT

6.2.1 Responsibilities

The LBNL EVMS Surveillance Team will provide adequate advanced notification of specific control accounts and processes that will be reviewed. It will also provide the subject project with adequate notice to ensure that required access to project documentation, facilities and resources will not interfere with on-going work. The Team will not require extensive presentations or preparations, and will review and interpret data provided in the project's native formats. The review will be conducted in a professional manner and in a spirit of constructive assessment and discovery. The Surveillance Team leader is solely responsible for the final determination of findings and recommendations and for ensuring that the results are communicated to the PMO and the Project Team.

The project's personnel should be prepared to demonstrate through objective project information that they are complying with applicable policies and procedures. Coordination between project personnel and the surveillance team will facilitate access to control account managers (CAMs) responsible for areas of specific interest, to adequate data and to LBNL policies in advance to allow for meaningful analysis.

The surveillance team leader will ensure that the review focuses on system compliance and does not involve non-system-related issues. Documented findings and corrective action plans will be available and utilized to close out issues identified during the review.

6.2.2 Project Information

Successful surveillance is predicated upon demonstration of compliance with the LBNL EVMS and applicable PMO Project Management procedures as identified in SECTION 2. Objective project information is produced in the normal conducting of business and this information will be utilized in the surveillance review process.

6.2.3 Orientation

The orientation time is used to introduce members of the surveillance and project teams and to discuss key EVMS-related forms and procedures. A brief overview of the nature of the project may be beneficial to understand its unique language, goals and unusual organizational relationships. The surveillance team also uses the orientation period to explain the goals and scope of the review, the code of conduct, the disposition of findings/concerns, and the resolution process.

6.2.4 Data Gathering

The surveillance review is conducted both through interviewing CAMs and additional project personnel, and through verifying the integrity of objective project data and information. The initial number and scope of interviews is determined and communicated in advance during the preparatory phase. Based on surveillance results, additional interviews may be requested.

During each interview, the surveillance team assesses the level of understanding and compliance with LBNL PMO policies, procedures, and processes, and monitors project practices to assess how well they comply with the intent of the EVMS guidelines. The surveillance review will be thorough and structured. This involves developing a list of subject areas to facilitate scheduled interviews, ensuring that discussions address the complete EVMS process.

The content of review topics and questions should be provided to appropriate project personnel prior to the review to facilitate responses and documentation availability. The surveillance may be as simple as conducting interviews with the project management office and sampling a few CAMs, or it may be more detailed, exploring the identified problem areas, depending upon the risk identified. A project that has demonstrated continued compliance through earlier surveillance would be a candidate for less intensive interviews. Conversely, continued compliance problems are indicative of a project that may require more interviews to understand the underlying reasons for non-compliance.

CAM interviews are a key component of EVMS surveillance because CAMs are the source of much of the EVMS information. CAM interviews are supplemented with data integrity tests performed independently. The ultimate objective is to determine the CAMs' use of the information derived from the EVMS as an effective management tool. It is recommended that at least 15% of the CAMs (by number or project value) be selected for interviews based on the Responsibility Assignment Matrix. All reviews will incorporate common attributes based on the National Defense Industrial Association (NDIA) Program Management Systems Committee (PMSC) Intent Guide, Copyright 2007.

The purpose of the interview is to assess the CAMs' understanding of the following subjects:

- Work authorization
- Organization
- Use of the information
- Change control and maintenance
- Variance analysis
- Scheduling and budgeting
- Knowledge of the process
- Estimate at complete
- Material management
- Subcontract management and integration of data
- EVMS methodologies
- Cost and schedule integration
- Cost accumulation
- Risk assessment and mitigation
- EVMS program training

Additional interviewees may include the project manager, the project business manager, Project Controls and line management.

6.2.5 Feedback

A key component of surveillance is communicating timely, pertinent, and candid feedback. Surveillance team members and project personnel will seek clarification to fully understand questions asked, the data sought, and the responses provided. If, after fully understanding the information provided, a team member finds a compliance issue, the team should discuss the observation before classifying it as a finding, concern, or misunderstanding.

Findings and recommendations are presented by the surveillance team leader to the project team for clarification or correction, and a preliminary report is prepared after the project team

has addressed preliminary feedback. The final report includes an action plan, containing measurable results and follow-up verification to resolve findings and mitigate concerns.

6.3 SURVEILLANCE RESULTS

6.3.1 Disposition of Team Assessments

Misunderstandings

The project team will clarify any findings that might be a result of misunderstandings in the feedback process. Additional data and/or communication may be required to resolve the issue. Misunderstandings that are not resolved in the feedback process become findings.

Findings

Findings fall into two broad categories: 1) compliance with the accepted EVMS description and 2) compliance with EVMS guidelines. Surveillance Findings are entered into LBNL's Corrective Action Tracking System (CATS). As the Findings are completed or as BCP's are approved, the responsible person will update the associated item in CATS.

Recommendations

The team members may recommend EVMS implementation enhancements such as sharing of successful practices, tools, or other items that come to their attention. Recommendations, however, are not the same as findings and, therefore, need not be tracked for closure.

6.3.2 Surveillance Review Close-out

The surveillance team attains consensus on the follow-up and verification required to close out findings resulting from the surveillance. A corrective action plan is established for the project reviewed, and realistic dates for closing out findings are determined. The surveillance team defines its role in the corrective action process, particularly when identified concerns are systemic issues rather than implementation issues. The project team is required to provide input regarding closure of corrective actions, including estimated completion dates. The review is considered complete when the surveillance leader concurs that all findings have been satisfactorily closed.

At times the project's team may disagree with the final surveillance results. When a finding is not due to a team's misunderstanding, the surveillance organization must be able to explain the impact of deviating from LBNL EVMS policy and the benefits to the project and management team of compliance with the intent of the EVMS guidelines. The team can bring the issue to the appropriate level of management for resolution.

Section 7

System Surveillance – Management Control and Process Improvement

7.1 OVERVIEW

When surveillance of a project has been completed, the results are collected and tracked by the PMO. This tracking is the source for metrics used to assess the overall health of the LBNL EVMS process. Summarized metrics are used to identify and characterize process and systemic problems across multiple projects. Systemic problems are subsequently addressed by updating training and/or EVMS process improvements. This is also known as “system surveillance.”

The information will be maintained by the PMO in e-Rooms and results are summarized to document the corrective actions of each review.

Trends are monitored, metrics maintained, and results consistently communicated to system users for process improvement. Surveillance incorporates a formal and documented problem resolution process, including communication of results to external and internal organizations. The problem resolution process describes how corrective actions are assigned and reviewed for completion, including resolution of systemic issues, which may be addressed by revised training and/or processes. Another key attribute is the sharing of successful practices and lessons learned. This can be accomplished through discussion at the Project Management Working Group meetings, process improvement meetings, and specialized training.

7.3.3 Training Change

Based on the results of surveillance the training approach and content may need to be reviewed for effectiveness. For example, if training deficiencies are prevalent, the corrective action may be to develop a special training class specific to the deficiencies. Alternatively, specific content of existing courses may be modified to stress a systemic problem that has been found.

7.3.4 Process Change

During surveillance, an opportunity for improvement may be recognized that requires a change to the accepted process. Such a process change should be accurately documented and reviewed with all relevant parties prior to approval and incorporation. The participants also

need to ensure that adequate notification and training take place as an integral part of implementing such a process change.

7.3.5 Annual Review

An effective surveillance program should be reviewed annually for completeness. Based on this review, the plan for the following year should then be developed. Findings in a particular area may indicate the need for enhanced review of a particular principle in the next year's plan. Other questions to consider are the following:

- Is the coverage adequate to cover the targeted programs?
- Are the persons conducting the surveillance adequately trained?
- Is management effective for problem resolution?
- Are findings being tracked for closure in a timely manner?
- Is the approach adequate?
- Is the project selection process effective?

The assessment is performed at the same level as the process description. Participation in the surveillance program evaluation and potential process revisions may include local experts, principals, and surveillance experts from other areas of LBNL.

Appendix A

LBNL Sample Agenda

Two EVMS Surveillance Reviews we will be completed on the following Project:

- 1) User Support Building Project
- 2) TEAM Project

Proposed Surveillance Dates

- 1) B51 Project April 22,2008

EVMS Surveillance Team Membership

B51 Project EVMS Review Meetings	
Kurt Deshayes (Team Lead)	Revisions
Les Dutton	Organization
Michael Barry	Analysis & Management Reporting
Kurt Deshayes	Planning & Budgeting
Jeremy Coyne	Accounting – Data Trace

Methodologies

The reviews have been scheduled to take place in duration of no more than one to two days depending on the number of CAM interviews required. This does not mean that the Project Teams will need to schedule two full days for the review but be available for interviews and questions from the LBNL Surveillance Team Members.

The review will be informal and only the pertinent project personnel will be required at the defined meetings. The review will be in accordance with the “LBNL Earned Value Management System Surveillance Plan”.

Earned Value Management System (EVMS) Review - Sample Agenda

Tuesday, April 22, 2008			
<i>Time</i>	<i>Subject</i>	<i>Name</i>	<i>Purpose</i>
8:00 – 9:00	Review Team Meeting	Review Team	The Review Team discusses the required actions of the day, and expectations of the Review Team
9:00 – 9:30	Project Team – Project Management System Overview	Project Team/ Review Team	The Project Team provides an overview on the project as a whole, and gives the Review Team the current status of the projects
9:30 - 10:30	Project EVM System Overview and Document Review with Project Team	Project Team/ Review Team	The Project Team provide a cradle-to-grave EVMS system description overview to the Review Team and goes over the current documentation developed on the project
10:30 – 11::00	Interview CAM – Joe Harkins	All Review Team Members	The Review Team Interviews the CAM
11:00-12:00	Interview CAM – John Patterson	All Review Team Members	The Review Team Interviews the CAM
12:00-1:00	Review Team Working Lunch		
1:00-2:00	Interview CAM – Robert Cronin	All Review Team Members	The Review Team Interviews the CAM
2:00-3:00	Interview CAM – Pat Thorson	All Review Team Members	The Review Team Interviews the CAM
3:00-4:00	Project Controls Interview – Sarah Morgan	Review Team/ Project Controls	The Review Team interviews the Project Controls Team
4:00-4:30	Review Team/ Project Team Open Discussion	Project Team/ Review Team	Review Team Discuss and issues that need to be clarified
4:30-5:30	Short Out -Brief	Project Team/ Review Team	Verbal Discussion on outcome of Review