

Earned Value Management & Project Scheduling Training



Spring 2012 Public Seminar Series

Already knowledgeable of Project Scheduling / EVMS and looking for more advanced insights into these topics? This seminar series also offers:

**Advanced Project Scheduling /
Advanced EVMS**

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SEMINAR REGISTRATION

18400 Von Karman Avenue, Suite 500 | Irvine, CA 92612 | 949 975 1550 x269 | www.smawins.com

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RICHARD BRODKORB



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TIMOTHY COONEY

Instructors

Our Instructors bring over 150 years of combined project management experience to the seminars. All accomplished speakers, they have trained over 15,000 people in project scheduling, earned value management and all aspects of practical, performance-based project management.

VENUE INFORMATION

IRVINE, CA

March 5-9 & April 23-26, 2012

Atrium Hotel
Orange County Airport
18700 MacArthur Blvd.
Irvine, CA 92612
800-854-3012

March group block expires: 2/20/12

April group block expires: 4/9/12

Group rate \$119++

Reference: "SM&A Seminar"

TYSON'S CORNER, VA

March 26-30 & June 11-14, 2012

Hilton Garden Inn Tyson's Corner
8301 Boone Blvd, Vienna, VA 22182
(703) 760-9777

March group block expires: 3/5/12

June group block expires: 5/21/12

Group rate \$224++

Reference: "SM&A Seminar"

DALLAS, TX

May 7-11, 2012

Crowne Plaza Suites Dallas
7800 Alpha Road
Dallas, Texas 75248
972-233-7600

Group block expires: 4/23/12

Group rate \$113++

Reference: "SM&A Seminar"

SAN ANTONIO, TX

July 12-13, 2012

Four Points by Sheraton,
San Antonio by the Riverwalk
524 S. St. Mary's Street
San Antonio, TX 78205
210-354-1333

Group block expires: 6/28/12

Group rate \$106++

Reference: "SM&A Seminar"

REGISTRATION INFORMATION

www.smawins.com/publicseminars

REGISTRATION

Registration may be completed online.

SEATING

Seating is limited for each seminar. If registering within two weeks of the seminar, call (949) 975-1550 x269 for space availability.

CANCELLATION POLICY

Cancellation made within 30 days of the seminar start date will incur a \$200 cancellation fee. Substitutions may be made at any time. Non-attendance without cancellation will incur the full seminar registration fee.

DISCOUNTS

- 10% for prepayment 31 days in advance
- 10% for groups of 3 or more attendees
- 20% for groups of 3 or more attendees prepaid 31 days in advance

PAYMENT

1. Credit Card: Download SM&A credit card authorization form at www.smawins.com/publicseminars or request form via email to smaseminars@smawins.com.
2. Check: Checks may be mailed to: SM&A – Attn: Seminars
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3. Govt Training Authorization (Form 1556 or other):
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4. Company Purchase Order:
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QUESTIONS?

Call (949) 975-1550 x269
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SEMINAR REGISTRATION INFORMATION

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2 PLEASE CHECK THE PROGRAM YOU'RE REGISTERING FOR...

	Location	Seminar	Date	Days	Cost	PDU's
<input type="checkbox"/>	Irvine, CA	Project Scheduling	3/5-6/12 (Mon-Tue)	2	\$1,050	14
<input type="checkbox"/>		Earned Value Mgmt. Systems	3/7-9/12 (Wed-Fri)	3	\$1,550	20
<input type="checkbox"/>		Project Scheduling & EVMS (Combined)	3/5-9/12 (Mon-Fri)	5	\$1,975	34
<input type="checkbox"/>		Advanced Project Scheduling	4/23-24/12 (Mon-Tue)	2	\$1,050	14
<input type="checkbox"/>		Advanced EVMS	4/25-26/12 (Wed-Thu)	2	\$1,050	14
<input type="checkbox"/>		Advanced Project Scheduling & EVMS (Combined)	4/23-26/12 (Mon-Thu)	4	\$1,900	28
<input type="checkbox"/>	Tyson's Corner, VA	Project Scheduling	3/26-27/12 (Mon-Tue)	2	\$1,050	14
<input type="checkbox"/>		Earned Value Mgmt. Systems	3/28-30/12 (Wed-Fri)	3	\$1,550	20
<input type="checkbox"/>		Project Scheduling & EVMS (Combined)	3/26-30/12 (Mon-Fri)	5	\$1,975	34
<input type="checkbox"/>		Advanced Project Scheduling	6/11-12/12 (Mon-Tue)	2	\$1,050	14
<input type="checkbox"/>		Advanced EVMS	6/13-14/12 (Wed-Thu)	2	\$1,050	14
<input type="checkbox"/>		Advanced Project Scheduling & EVMS (Combined)	6/11-14/12 (Mon-Thu)	4	\$1,900	28
<input type="checkbox"/>	Dallas, TX	Project Scheduling	5/7-8/12 (Mon-Tue)	2	\$1,050	14
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<input type="checkbox"/>		Project Scheduling & EVMS (Combined)	5/7-11/12 (Mon-Fri)	5	\$1,975	34
<input type="checkbox"/>	San Antonio, TX	Advanced EVMS	7/12-13/12 (Thu-Fri)	2	\$1,050	14

3 PLEASE CHECK YOUR METHOD OF PAYMENT (see payment information above)...

- Credit Card Check Government Training Form Company Purchase Order

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Project Scheduling



Project Scheduling is an intensive two-day interactive workshop. It is designed for project managers and their staff as well as any other project personnel who need to understand principles of scheduling and use of schedules in the management of projects. This workshop provides practical, results-oriented demonstrations of the effective use of scheduling systems.

At the conclusion of this workshop each student will better understand how his/her commercial project scheduling package identifies the critical path; calculates float (slack); resource levels projects; and supports “what if” analyses.

In addition to networks, the workshop addresses: Gantt/bar charts; integration of the schedule, technical and cost baseline elements; potential solutions for resolving late completion forecasts; and schedule reporting and analysis. Students should be prepared to “roll up their sleeves” since this is a fast-paced workshop that makes extensive use of case studies.

Course Outline

Introduction to Scheduling

- Key definitions
- The planning and scheduling process
- CASE STUDY: Your schedule

Schedule Types

- Gantt/bar charts
- Milestone/event charts
- Networks
- Other scheduling techniques
- Standard “symbolologies”

Schedule Development Process

- Defining the work using a work breakdown structure
- Planning and sequencing activities
- Time durations
- Integrating calendar and resources

Networks and Their Development

- Arrow Diagramming Method (ADM)
- Precedence Diagramming Method (PDM)
- Types of relationships
- Hammocks and dragnets
- CASE STUDY: Network Logic A

Calculating the Network

- Time durations
- Forward and backward passes
- Float: what is it really?
- Who “owns” the float?
- The “critical path”
- CASE STUDY: Network Logic B
- CASE STUDY: Developing a Project Schedule

Resource Application

- Needs vs. availability
- Resulting profiles
- Resource leveling
- CASE STUDY: Resourcing the Project Schedule
- CASE STUDY: Resource Leveling
- CASE STUDY: Pricing the Project Resources

Schedule Baseline

- Purpose, use and maintenance
- Baseline versus current schedule
- Baseline change control methods
- “What ifs”
- Compressing/crashing the schedule
- CASE STUDY: Crashing the Network

Schedule Reporting and Analysis

- Types of reports and management indicators
- Trend analysis
- Exception reporting

Current Topics

- The re-emergence of a sound scheduling philosophy
- Integrating schedules with cost... how?

PMBOK

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INITIATION

PLANNING

EXECUTION

CONTROL

Earned Value Management Systems



This seminar addresses EVMS concepts, applications and issues in the context of performance-based management and budgeting. It uses case studies throughout to reinforce the concepts. It addresses how to organize project work, plan for performance management, accumulate performance data, monitor project performance, maintain the project baseline, and assess project performance.

The system compliance process is also discussed. This seminar is designed for the person new to the world of performance-based management and EVMS and also for those who are looking for a refresher/update on these topics.

Course Outline

Performance Management Concepts

- Basic concepts
- Earned value: What does it all mean?
- Basic management processes inherent to EVMS
- Nature of the requirements
- CASE STUDY: Earned Value Problem

Organizing The Project Work

- Work Breakdown Structure (WBS) and dictionary
- Assigning responsibility via the responsibility matrix
- What is a “control account?”
- Sizing of control accounts: “too big” vs. “too small”
- Work teams/integrated product teams

Planning For Performance Management

- What is true cost/schedule integration?
- Essential scheduling system characteristics
- Work packages, planning packages and summary level planning
- Management reserves vs. undistributed budgets
- Budget vs. funds: critical distinctions
- Accepted earned-value techniques and how each works
- CASE STUDY: Control Account Preparation
- What about risk management?

Accumulating Performance Data

- Data elements used for performance management and trend analysis
- Accounting for costs of all project resources
- Subcontract and material performance management
- Price and usage variances on material and labor
- CASE STUDY: Control Account Status

Monitoring Project Performance

- The myth requiring written analysis
- How to define a “significant” variance in your system
- Control account analysis and the tools required
- Estimating at-completion costs

Controlling the Project Baselines

- Types of changes impacting project cost and schedule baselines
- Re-baselining versus internal replanning: key distinctions and current interpretations

Controlling the Project Baselines (continued)

- Requirements for baseline traceability
- Project baseline logs
- Essential disciplines inherent to baseline stability
- Over target baselines
- CASE STUDY: Change Incorporation/Baseline Logs

Assessing Project Performance

- How to get the most out of the data
- Key performance indices: CPI, SPI, TCPI
- CASE STUDY: Control Account

Performance Analysis

- Graphical presentation techniques
- Graphical analysis of major programs

System Compliance Process

- The review process
- IBRs—true added value
- Self-conducted reviews
- Post-acceptance surveillance (internal and external)

What's New?

- NDIA Intent Guide officially recognized by DoD as an important reference for interpreting the intent of the EVMS guidelines in ANSI/EIA 748; EVM Implementation Guide (EVMIG) now references the Intent Guide
- DCMA EVM center under new management with renewed emphasis on DCMA's role as the DoD executive agent for EVM
- The Performance Management-Civilian Agency Industry Working Group (PM-CAIWG) established to provide a forum for the open exchange of government and industry views on performance-based management systems (PBMS), including earned value management (EVM) and related concerns
- DoD Instruction 5000.2 and the EVM DFARS clauses have been updated to reflect current DoD EVM policy
- The revised EVM guidelines, ANSI/EIA 748-B, published in February 2008

Summary

- Lessons learned
- How to benefit from performance management

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Advanced Project Scheduling



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This workshop provides key insights into disciplines and best practices of scheduling while exploring industry proven techniques for managing schedules throughout the complete lifecycle of any project. The course is designed for project managers and their staff as well as any other project personnel who are responsible for developing, delivering, and maintaining project schedules.

Included in this course are integrated case studies and hands on exercises of key scheduling concepts. By attending this workshop each student will have direct exposure to best practices for implementing and managing the schedule for the projects he/she is responsible to guide.

In addition to best practices and real world case studies, this workshop identifies obstacles to effective scheduling, methods for schedule development, practical use of constraints, methodologies for developing and implementing IMP/IMS, schedule risk management, enterprise schedule techniques, and a review of contemporary scheduling tools.

Course Outline

Scheduling Overview

- Advanced scheduling
- Basics of scheduling
- Best practice scheduling

Obstacles

- Well defined objectives
- Knowledgeable personnel
- Task identification, sequencing, interrelationships and durations
- Allocation of resources
- Defined calendars
- Implementation of scheduling tools
- Management support

Developing the “Excellent” Schedule

- Goals of schedule development
- CASE STUDY: Project Scope Development
- Team involvement
- Brainstorming for activity/task identification
- “Cards on the Wall”

Constraints

- Relationship to logic-based networks/schedules
- CASE STUDY: Developing Project Logic
- Calculating the network
- CASE STUDY: Integrating the Network
- Best practices for effective scheduling

Schedule Analysis

- Types of analysis
- Schedule assessment
- DCMA tripwires
- CASE STUDY: Evaluating a Project Schedule

Schedule Risk

- Identifying risk
- Monte Carlo
- Merge bias
- Schedule risk assessment
- Understanding risk

Enterprise Wide Scheduling

- Application
- Benefits
- Resource management
- Schedule validity analysis
- Multi-project scheduling

Comparing Actual Performance to the Plan

- Schedule status analysis
- Resolving scheduling problems
- Crashing database requirements

Schedule Change Management

- Baseline schedule changes
- Change management process
- Controlling all schedules
- Survey of scheduling software

Summary and Recap

Advanced EVMS



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This workshop describes industry best practices and operational techniques for monitoring and tracking project performance and reviews methods for calculating and verifying the estimate at completion. It provides the basis for answering such management questions as, “How efficiently are we using our time?” “When is the project likely to be completed?” “Are we under or over our budget?” “How efficiently are we using our resources?” “How will we achieve the current management estimate at completion?”

The workshop reviews the DCMA’s Tripwires and explains how these are applied. The workshop also addresses decisions regarding establishing management reserve (MR) and assessing the rate of MR application.

Course Outline

Introduction to the Work

- Key elements of an effective EVMS
- Systemic EVMS weaknesses as identified by the DCMA
- WORK GROUP DISCUSSION: DCMA Observations re. Systemic Issues

Data Analysis

- Calculating cost and schedule efficiency factors: SPI, CPI, TCPI
- Recap of CPI history on DoD contracts
- Developing calculated, independent estimates at completion (IEAC)
- Evaluating effects of past performance efficiencies on current completion forecasts
- DCMA tripwires
- The Rayleigh Model for forecasting
- CASE STUDY: CPR Analysis

Planning

- Control account
- DCMA’s 14 schedule assessment points
- Schedule health metrics
- WORK GROUP DISCUSSION: Evaluating a Project Schedule

Integrated Baseline Reviews (IBRs)

- IBR objectives, risk types and execution
- Scope component
- Schedule component
- Budget/resources

Management Reserve

- Schedule risk assessment
- Management Reserve - developing an estimate related to risk management planning
- Monitoring management reserve

Variance Analysis

- Writing better variance analysis reports
- The concept of “earned value” and its related SPI calculation
- WORK GROUP DISCUSSION: VAR Evaluation

Estimate at Completion (EAC)

- Developing the EAC
- CASE STUDY: Calculating EAC at Control Account Level

Baseline Maintenance

- Rebaselining what and why
- Tracking the volume of baseline changes
- Over Target Baselines (OTB) and Over Target Schedules (OTS) - considerations, drawbacks and benefits

EVMS Surveillance

- Developing a surveillance plan
- Data trace examples
- Surveillance team selection and composition
- Surveillance Planning

Summary and Recap