



Guidance on EVMS Tailoring & Scaling

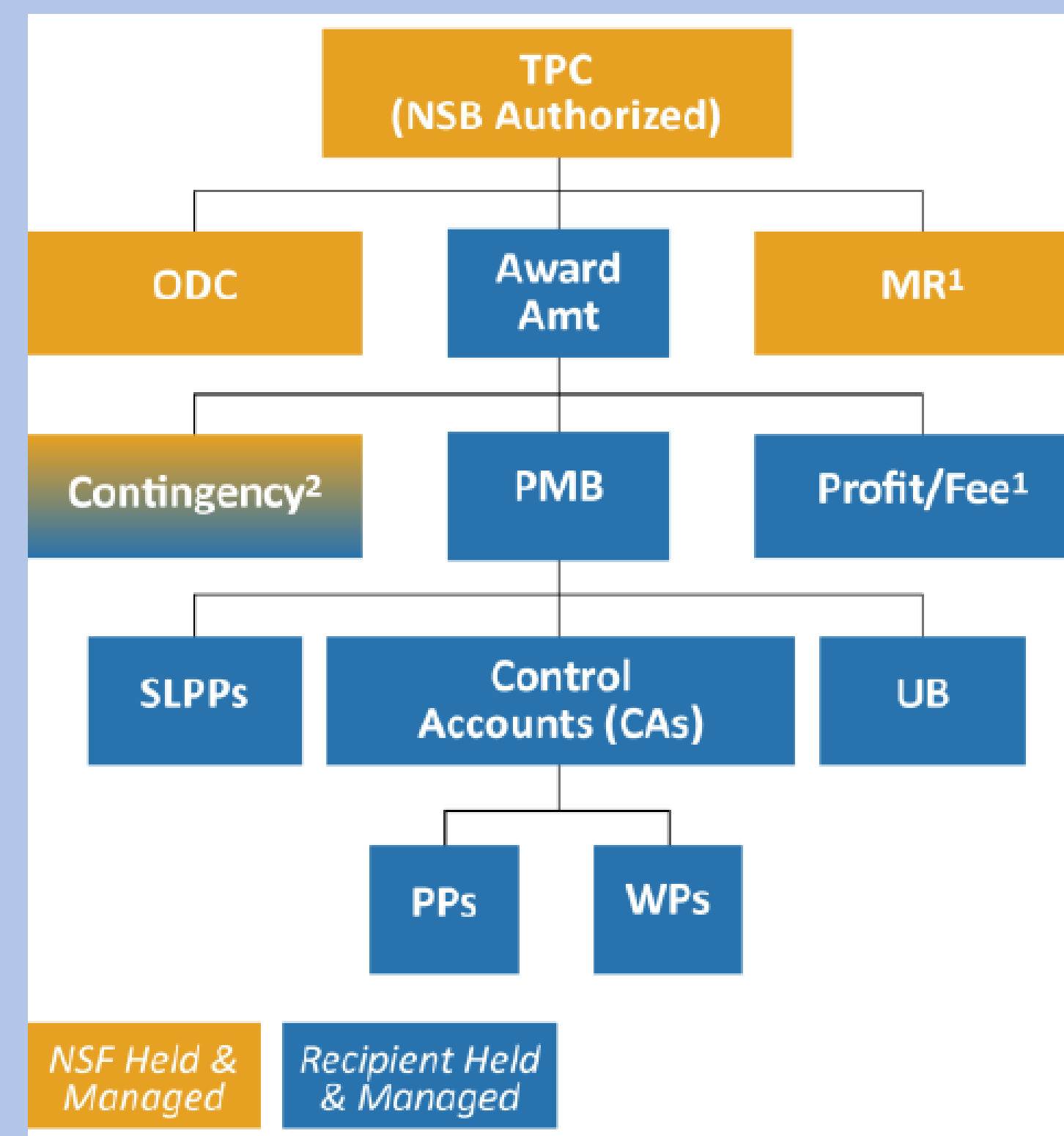
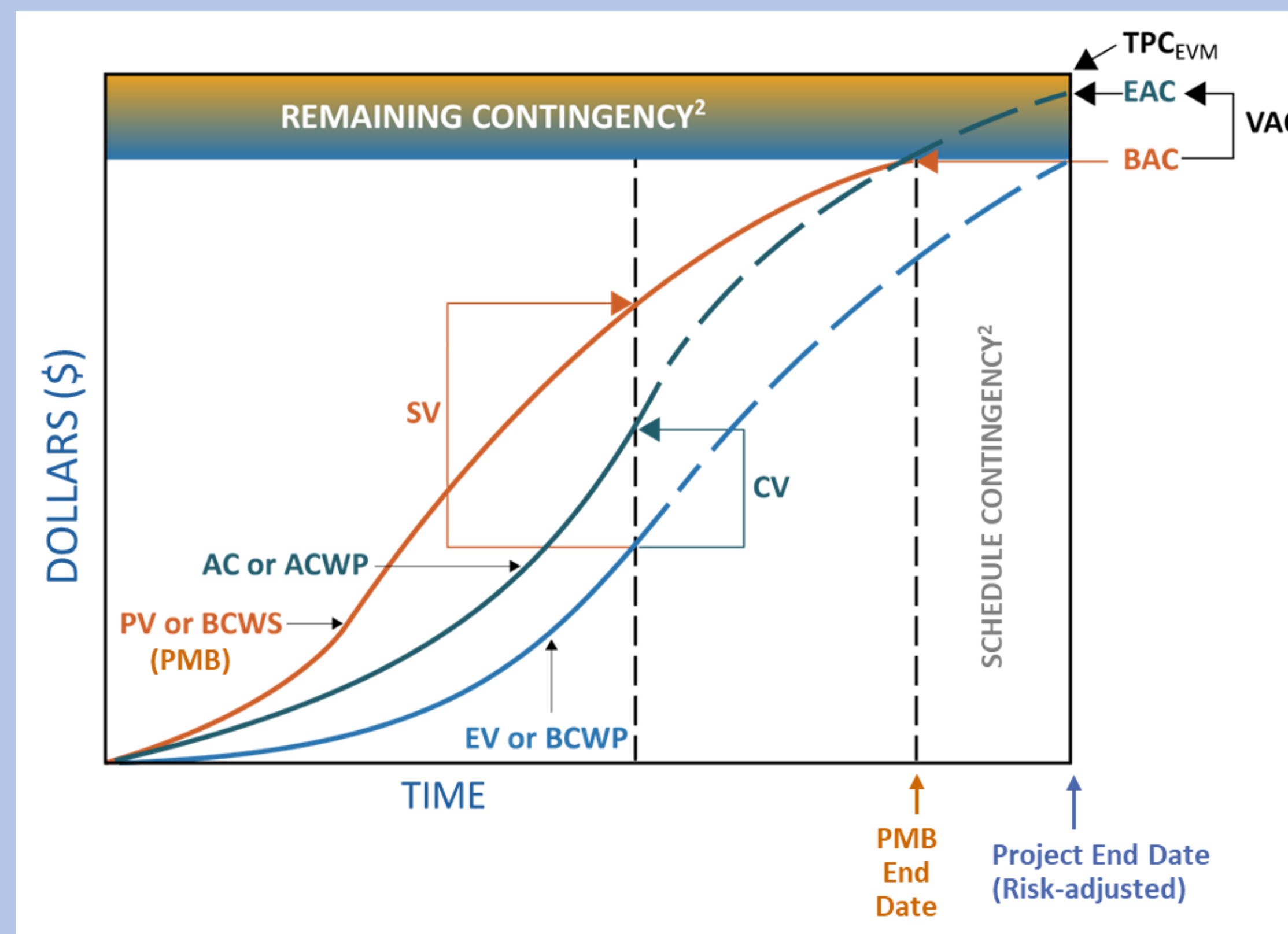
NSF Research Infrastructure Workshop, Sept 2022, Presented by Rebecca Yasky

NSF EVMS Guidelines – EIA-748C

1. **Define Work Scope (WBS)**
2. **Define Project Organization (OBS)**
3. Integrate Processes
4. Identify Overhead Management
5. **Integrate WBS/OBS to Create Control Accounts**
6. **Schedule with Network Logic**
7. **Set Measurement Indicators**
8. **Establish Budgets for Authorized Work**
9. **Budget by Cost Elements**
10. Create Work Packages, Planning Packages
11. Sum Detail Budgets to Control Accounts
12. LOE Planning and Control
13. **Establish Overhead Budgets**
14. **Identify Contingency Budget and Schedule**
15. *Reconcile the sum of all budgets with TPC*
16. Record Direct Costs
17. **Summarize Direct Costs by WBS**
18. **Summarize Direct Costs by OBS**
19. Record/Allocate Indirect Costs
20. Identify Unit and Lot Costs
21. *Track and Report Costs and Quantities (Accruals)*
22. **Analysis and Management Reports**
23. **Identify Significant Variance for Analysis**
24. Analysis Indirect Cost Variance
25. **Summarize Information for Management**
26. **Implement Corrective Actions**
27. **Revise Estimate at Complete (EAC) and Risk-adjusted EAC**
28. **Incorporate Changes in Timely Manner (Liens List)**
29. Reconcile Current to Prior Budgets
30. Control Retroactive Changes
31. Prevent Unauthorized Changes
32. **Document PMB changes (budget & schedule contingency allocations)**

Italics – tailored guidelines for NSF practices
Bold – primary guidelines for scaled EVMS

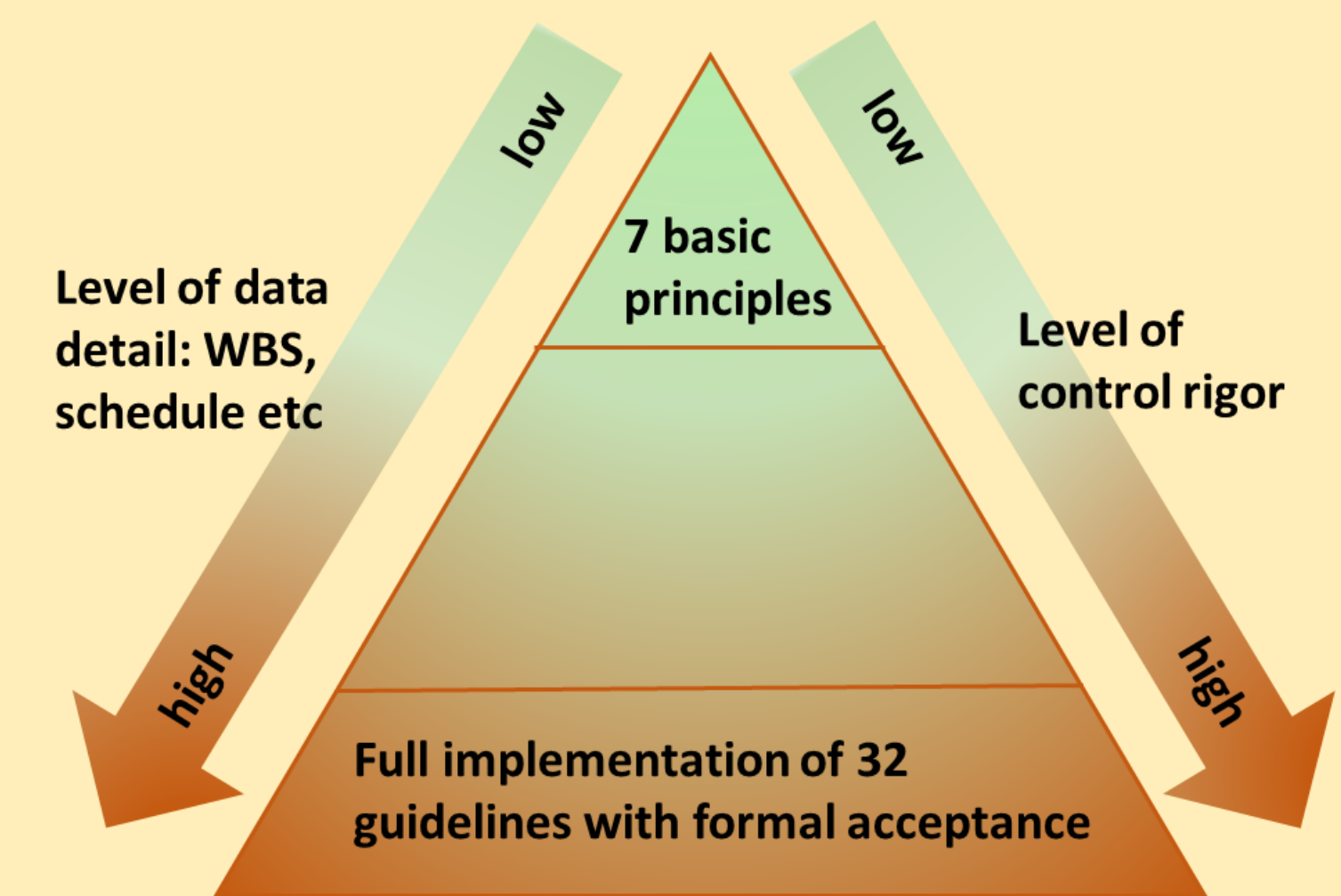
NSF EVMS Gold Card



¹ If authorized
² During execution, contingency moves into PMB per change control process

Seven Basic Principles of EVMS

1. Plan all work scope using WPs and PPs
2. Assign scope to responsible person/organization
3. Integrate scope, schedule and budget for the PMB to measure accomplishments against.
4. Use actual costs incurred
5. Assess accomplishments at the work level
6. Analyze significant variances from plan
7. Use EVMS data in the project's management processes



EVM Scaling at NSF

NSF Practice Guide for Scaled EVMS

- Process 1 – Define and organize the project (Principles 1 & 2)
- Process 2 – Establish project cost, schedule, and contingencies (Principle 3)
- Process 3 – Progress and performance monitoring (Principles 4, 5, & 7)
- Process 4 – Management analysis and control (Principles 6 & 7)