



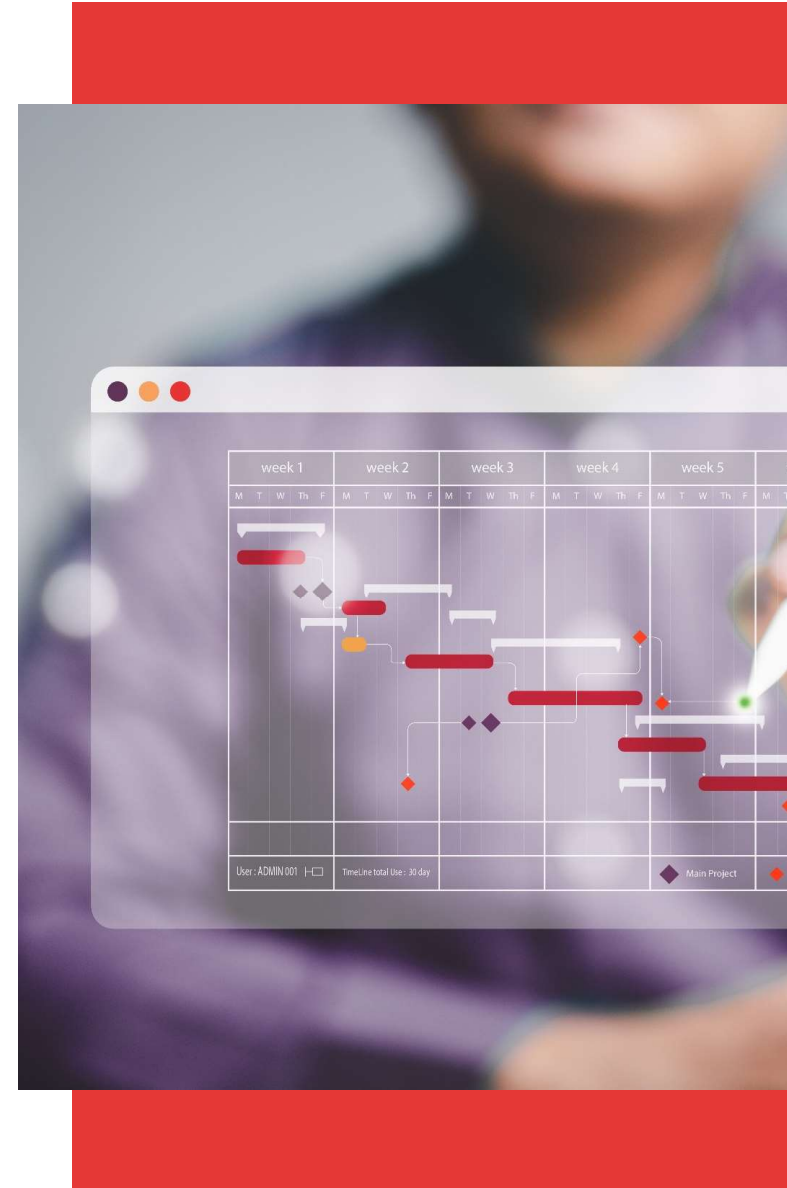
Enhancing and Leveraging Project Management and Earned Value Artefacts

Daniel Foster – Co-Founder Skeiny Projects

ProjectChat 2024



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Acknowledgment of Country

I begin today by acknowledging the Kurna people, Traditional Custodians of the land on which we gather today and pay my respects to their Elders past, present and emerging. I extend that respect to Aboriginal and Torres Strait Islander peoples here today.

What you will hear about today!

Some tips, tricks and ideas from Skeiny's valued client work in enhancing some key artefacts. We chose the following...

01

Work Authorisation Document

02

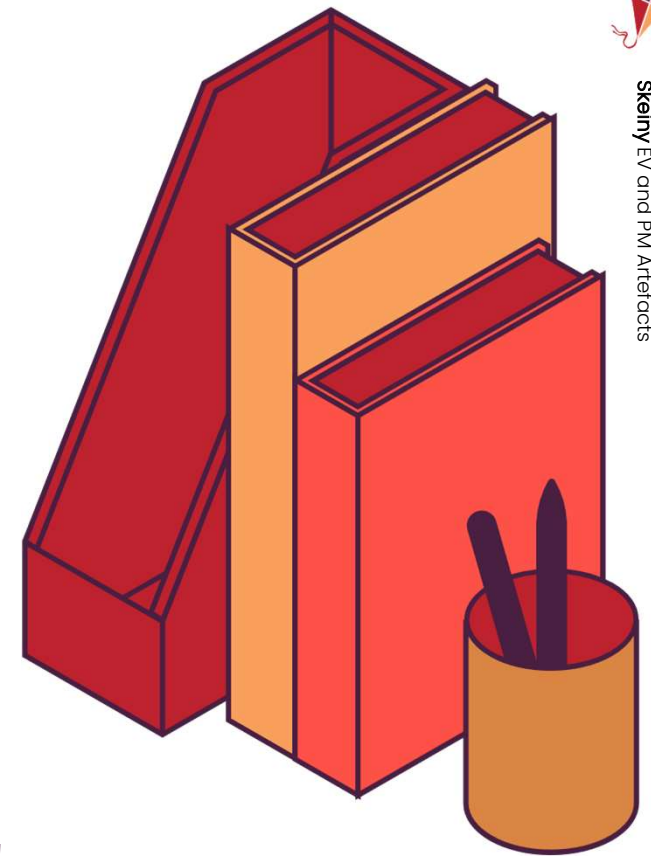
Baseline Change Request Form/Process

03

Earned Value Performance Report...5

04

Questions and feedback



So let's get started!

First





01 The COBRA WAD

WBS: 1.30.10				
OBS: ENG1				
Control Account Description: Subsystem 1 - SATCOM				
	Baseline	Forecast	Actual	Pending
Start	31/05/2024	4/06/2024		1/05/2024
Finish	23/10/2024	23/10/2024		19/09/2024
Budget Detail	Hours	BASE		
LABOUR	0.00	1,241,504.00		
MATERIALS	0.00	1,331,513.04		
ODC	0.00	19,290.00		
SUBCON	0.00	336,378.00		
Total Budget:	0.00	2,928,685.04		
Authorization				
CAM:				Date:
Program Manager:				Date:

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What are 3 things that you would add / change?

Responses ...





Full WBSD fields that are needed



Work Authorisation Document example

Summary level
This section is maintained in line with the WBS Dictionary for the project

WBS Element Title	Purpose	CAM	OBS Reference	Project
Summary Description				
Statement of Work Clause Reference		WBS Reference		

Specific Assumptions

Assumption1	Infeeds	Infeed1	Outfeeds	Outfeed1	Outfeed2	Outfeed3	Contract Documents, Specification And Internal Document References	Document1
Assumption2		Infeed2						
Assumption3		Infeed3						

Scope and Time Summary
This section is maintained in line with the FMB for the project

Resource Type

- Labour
- Material
- DOC
- Sub-con

Duration: Start Date: 1/01/2026, Finish Date: 1/02/2028, Acceptance: 544

Cost by resource Type: Resource Type: Hours: 50, Cost: 0, Exchange R: Reporting Comment:

Signature level
This section is maintained in line with the authorities for the project

Delegate	Signing for	Name	Signature	Date
Project Management Office	Tool that holds the source data. The WAD has been accurately completed in line with the EVMS policies, processes and templates.			
Project Finance	This WAD is in line with financial reporting for the project.			
Functional Manager	This WAD is in line with the functional resources available within the business to work on this project. The WAD is in line with BoE for this work.			
Control Account Manager	Acceptance of Accountability and Overall Responsibility to deliver the scope within the cost and time boundaries described in this WAD.			
Project Manager	Delegation of the Accountability for this Control Account to the aforementioned CAM. This WAD is in line with the overall Project Authorisation.			

Work Package level
This section is used to detail the work packages and planning packages within this Control Account. These work packages are initially authorised by the CAM through this WAD and amended under Baseline Change or Rolling Wave Processes if required.

Work Package Number	Work Package Title	Work Package Manager	Purpose	Summary Description	WP Techniques	WP Progress Method	Start Date	Finish Date	Approx working days	Labour Cost	Material Cost	Subcontract Cost	Other Direct Cost	Total Cost
														0

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In and Out feeds can be imported from schedule



S Curve giving us resources over time



Reasons that each role is signing the document



Skeiny Example WAD

WP level in addition to control account




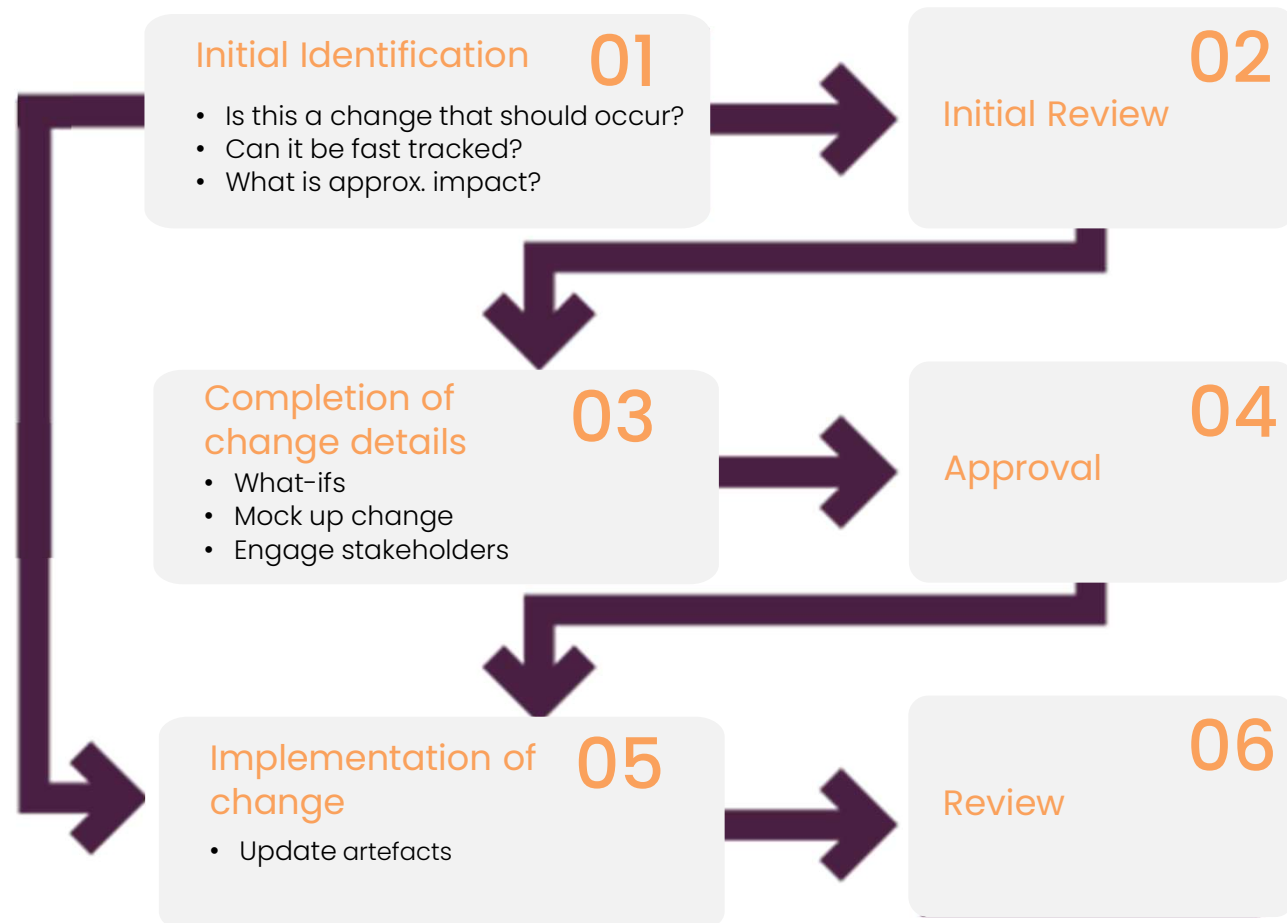
02 Baseline Change Request Form/Process

Does it feel like this?



Our preferred process

- 
- Fast track
- Does it need full board approval?
 - Does it need a change?



Key information on form



Our preferred process

Checklist



Project Change Request Form Example						
Change Details			Project Name			
Overall Change Impact	Scope Yes	Time	Cost	Funding Source	Change category	Change Type
Confirmation that change hasn't impacted the following criteria (if yes refer to PMO prior to proceeding)		Change doesn't impact a WP (in any way) in the past, or rolling wave or freeze periods?		Change doesn't impact the reported Planned Value and Earned Value for the last period?		
Short explanation of the reason to make this change		Short explanation of the impact of making the change				
Complex Change Details						
Attach further information in a succinct and understandable format showing the impact of the change. This information to be presented to change approvers for review and approval. Summarise that information here.						
Milestones impacted	Milestone	Current	Post Change	Delta (approx working)		
	Milestone1		36892	36928	-24	
	Milestone2					
	Milestone3					
Contingency and Work package budgets impacted	Work Package	Current	Post Change	Delta		
	Work Package 1		1	2	-1	
	Work Package 2				0	
	Work Package 3				0	
Approval signatures						
Delegate	Signing for	Name	Signature	Date		
PMO	The change has been detailed correctly above in terms of impacts and adheres to the rules within the EVMS.					
CAM (insert multiple lines for multiple CAMs)	Acceptance of the amended Accountability and Overall Responsibility to deliver the scope within the cost and time boundaries described in this Change.					
Project Finance	This change is in line with financial reporting for the project.					
Project Manager	Acceptance of the amended Accountabilities from this change. Acceptance of the reason and impact of the change which is in line with overall Project Authorisation.					
Post Approval checklist						
	Contract Documents			Financial Reporting packs		
	WAD			PCR register		
	WBSD					
Approval signatures						
	Signing for	Name	Signature	Date		
PMO	The change has been correctly implemented and all impacted artefacts have been updated.					
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Bounding and categorising change




Reasons that each role is signing the document

Skeiny EV and PM Artefacts


Your thoughts...

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Did we miss something?

Waiting for responses ...





03 Earned Value Performance Report...5

We are seeing this ASDEFCON standard artefact.

EARNED VALUE PERFORMANCE REPORT - PROBLEM ANALYSIS (FORMAT 5)				
EARNED VALUE PERFORMANCE REPORT - PROBLEM ANALYSIS (FORMAT 5)				Page of
CONTRACTOR:	CONTRACT TYPE/NUMBER	PROGRAM NAME/NUMBER	REPORT PERIOD	SIGNATURE
LOCATION:				TITLE
DEVELOPMENT <input type="checkbox"/> PRODUCTION <input type="checkbox"/>				DATE
EVALUATION				
SECTION 1:				
SECTION 2:				
SECTION 3:				
SECTION 4:				

Earned Value Performance Report...5

COBRA IPMR5 (latest version to US Defence standards)



CLASSIFICATION (When Filled In)									
INTEGRATED PROGRAM MANAGEMENT REPORT FORMAT 5 - Explanations and Problem Analysis									PENDING UPDATE TO OMB No. 0704-0188
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			2024 / 01 / 01			b. TO (YYYYMMDD)	
	c. TYPE	d. SHARE RATIO	c. EVMS ACCEPTANCE						
			NO		YES (YYYYMMDD)			2024 / 01 / 31	
5. Evaluation									
1.30.10 Subsystem 1 - SATCOM									
	Budget	Progress	Actuals	SV in \$	SV in %	CV in \$	CV in %	SPI	CPI
Current:	0	0	0	0	0	-	0	-	-
Cumulative:	0	0	8,486	0	0	-	-8,486	-	-
	BAC	EAC	VAC in \$	VAC in %	TCPI to BAC	TCPI to EAC			0.00
At Complete:	4,135,404	4,143,891	-8,486	0%	1.00	1.00			
Explanation of Variance/Description of Problem:									
Impact:									
Corrective Action:									
Monthly Summary (to include technical causes of VARs, Impacts) and Corrective Action(s):									
Prepared by: _____ Date: _____ Approved by: _____ Date: _____									

EV Performance Report...5 Of the Future?



Show trends on the form

Track the actions in the action register



CLASSIFICATION (When Filled In)									
INTEGRATED PROGRAM MANAGEMENT REPORT									
FORMAT 5 - Explanations and Problem Analysis									
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				2024 / 01 / 01	
		c. TYPE		d. SHARE RATIO		c. EVMS ACCEPTANCE		b. TO (YYYYMMDD)	
						NO		2024 / 01 / 31	
						YES		(YYYYMMDD)	
5. Evaluation									
1.30.10 Subsystem 1 - SATCOM									
	Budget	Progress	Actuals	SV in \$	SV in %	CV in \$	CV in %	SPI	CPI
Current:	0	0	0	0	0	-	0	-	-
Cumulative:	0	0	8,486	0	0	-	-8,486	-	0.00
	BAC	EAC	VAC in \$	VAC in %	TCPI to BAC	TCPI to EAC			
At Complete:	4,135,404	4,143,891	-8,486	0%	1.00	1.00			
Explanation of Variance/Description of Problem:									
Impact: Month and ITD narrative									
Corrective Action:									
Monthly Summary (to include technical causes of VARs, Impacts) and Corrective Action(s):									
Prepared by: _____ Date: _____ Approved by: _____ Date: _____									



04 Questions and feedback




And then





Your thoughts...

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What artefact do you wish would be improved?

View responses ...



Thank you

For listening and
participating

If you would like a free copy of the document templates I presented today then please email me dan@skeiny.com.au

We have improved versions of all the project management artefacts to run a complex project that we deploy for setting up and/or improving a project team

I would also love to hear about other ways of working and improving

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Thankyou Project Chat!



Please direct any questions you have to:

Dan Foster

Managing Principal Partner

E dan@skeiny.com.au



Daniel Foster

Managing Principal Partner

Daniel is a Certified Practising Project Director (CPPD) who has been running projects successfully for almost two decades. He has worked in various industries performing a variety of project management roles. He is familiar with the latest frameworks for project delivery and is valued by clients for his analytical skills.