

## Conference Dates

Tuesday 10<sup>th</sup> and Wednesday 11<sup>th</sup> June 2008

Armourers' Hall

Tube: Moorgate

## Specialist training workshops

Monday 9<sup>th</sup>, Thursday 12<sup>th</sup> and Friday 13<sup>th</sup> June 2008

Central London

**Each day carries 5 APM CPD points**

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# PROJECT CONTROLS EVAXIII

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## The Annual Earned Value Conference for the UK

This year's event is looking at Earned Value as the vehicle for Integrating the Organisation Transparently.

ORGANISED BY

**STEVE WAKE  
PROJECTS LTD.**

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## This year's programme includes:

### Conference

2 days of conference presentations 10<sup>th</sup> and 11<sup>th</sup> June.

### Workshops

Specialist workshops before and after the conference on the 9<sup>th</sup>, 12<sup>th</sup> and 13<sup>th</sup> for everyone from beginners through to experts.

### Who should attend?

- Project Stakeholders
- Project Teams
- Intelligent Customers
- Finance and Engineering Directors
- Senior Project and Programme Management
- Senior Civil and Public Servants
- Cost and Management Accountants
- Industry Consultants
- Auditors
- Trainers
- Risk Managers

### Benefits

- Career and organisational development (5 APM CPD points per day)
- Presentation content covers a wide area and highlights the latest developments.
- Knowledgeable senior and experienced speakers from industry.
- Best Earned Value networking opportunity of the year in the UK.

# E.V.A.

IN THE UK



**EARNED VALUE ANALYSIS**

**PROTECTING PROFITS**

**CONTROLLING COSTS**

**INTEGRATING THE ORGANISATION  
TRANSPARENTLY**

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# EVA XIII Conference Day 1

Tuesday 10<sup>th</sup> June

**09:00 Registration**

**09:30 Towards Project Management Excellence (Including Integrated Project Control)**

*Simon Dakin, Director of Through Life Project Management. Defence Equipment and Support. (DE&S).*

**10:00 Beyond The IBR (Integrated Baseline Review)**

*David Bright, Director. BMT Sigma.*

**10:30 Future Aircraft Carrier EVM Implementation**

*Gawain Evans, Financial Controller. Capital Ships IPT  
John Flaherty, Senior Consultant. OTC Optima.*

**11:00 Coffee**

**11:30 Implementing EV in services**

*John Chapman, Programme Director. Touchstone plc.*

**12:15 Devolving accountability with the help of EVA**

*Tim Purdy, Senior Consultant. Wexner.*

**13:00 Lunch**

**14:00 Bringing It All Together**

*Didi Hopkins and Chrissie Tiller, CTA-Elegant Solutions*

**15:00 Tea**

**15:30 EVM for Mutual Benefit**

*Dave Lord, FALCON Project Manager. BAE Systems.  
Alex Davis, FALCON Project Controls Manager. TFCS IPT, DE&S.*

**16:15 Project Management Assurance – The Way Ahead.**

*David Stephens, Head of Project Management Assurance  
Defence Equipment and Support. (DE&S).*

**16:45 Summary**

**17:00 Close**

**18:30 EVA networking dinner.**

# EVA XIII Conference Day 2

Wednesday 11<sup>th</sup> June

**09:00 Registration**

**09:30 Getting the most out of EVA - case study using the Construction of Whiston Hospital**

*Sean O'Driscoll, Project Director.  
Introduced by Paul Kidston, Head of Project Control. Taylor Woodrow.*

**10:00 Applying Earned Value in Agile Projects Reporting**

*Dr Andy Carmichael, Professional Services Director. xProcess Europe Ltd.*

**10:30 Re-examination of CPI and Examination of SPI(t) Stability (20% stability debunk)**

*Kym Henderson H.P.  
PMII CPM Board member*

**11:00 Coffee**

**11:30 Transparency challenges in major public projects.**

*Ole Jonny Klakegg, Research Director Concept Programme. NTNU (Norwegian University of Science and Technology)*

**12:15 EVM: part of the project culture at CERN**

*Pierre Bonnal, Project engineer Accelerators & Beams.  
Jurgen De Jonghe, Project Management tools, IT Department. CERN, Geneva.*

**12:45 Lunch**

**13:45 Implementing Earned Value Analysis in the Real World - HSBC's experience**

*Ed Chapman-Parmar IT Programme Manager. HSBC.*

**14:15 Measuring Time: A simulation study of earned value metrics to forecast the total project duration**

*Professor Mario Vanhoucke, Ghent University and Vlerick Leuven Gent, Management School Belgium.*

*Stephan Vandevoorde, Senior Project Manager.*

*Fabricom GTI Suez, Brussels, Belgium  
Tom Van Acker, IT consultant  
OR-AS, Gent, Belgium*

**14:45 An Earned Value Case Study**

*Russell Berkeley, Deltek UK*

**15:15 Tea**

**15:45 Contract Forms and Earned Value**

*Gerald Orman BSc, CEng, MIET  
Managing Director and proprietor of the contracts-expert.com website.  
Orman Risk Analysts*

**16:15 Earned Value - How to establish meaningful earned value performance from a programme based largely on fixed price contracts. Including a brief study of Earned Value on the Victoria Line Upgrade.**

*Gary Jones, Senior Planning Consultant.  
Nichols Group*

**16:45 Summary**

**17:00 Close**

# EVA XIII College Workshops

Day 1 - Monday 9<sup>th</sup> June

In-depth and small group training workshops offered by respected and experienced practitioners. Each workshop starts at 10am and finishes at 4pm.

**You can only do one workshop from each day. Remember to put the number of that workshop on the order form.**

## 1. Earned Value for Beginners. *Steve Wake*

Workshop Objectives	<ol style="list-style-type: none"><li>1. Know the basic EV concepts.</li><li>2. Know the EV process.</li><li>3. Initial implementation strategy.</li></ol>
Workshop Outline	An introductory course on earned value combining a walkthrough of the terminology and processes with implementation issues and advice given by a tutor with unparalleled knowledge of the UK situation.
Target Audience	All project, programme and business management stakeholders who need an overview or initial grounding in Earned Value
Pre-Requisite	The course assumes that the delegates have no prior knowledge of EVM.

## 2. EVMS Review Workshop (including IBRs). *Russell Berkeley Deltek UK*

Workshop Objectives	<ol style="list-style-type: none"><li>1. To consolidate existing Earned Value Management</li><li>2. Introduction to the international Standards for EVM and associated guides for reviews</li><li>3. Introduction to conducting a review including:<ol style="list-style-type: none"><li>a. Timing</li><li>b. Logistics before the review</li><li>c. Logistics during the review</li><li>d. Conduct during the review</li><li>e. Finalising the review</li><li>f. Completing the final report</li></ol></li></ol>
Workshop Outline	This course should provide the attendee whether they are from a contracting organisation or a customer, with all the information they need to conduct a review of a system whatever the maturity.
Target Audience	All organisations and customers that are using or intending to use EVM.
Pre-Requisite Or Equipment	The course assumes a low level of understanding of EVM, and therefore is open to all levels
Course Numbers	Limited to 12 People

**3. The Saint-André Wineyard Project Case Study: An approach to manage EVM and Project Risks coherently.**  
*Pierre Bonnal, CERN, Geneva. Jurgen De Jonghe, CERN, Geneva.*

Workshop Objectives	Provide a framework for managing risks and EVM in a coherent way. At the end of the workshop participants may also become more knowledgeable about wine making through the pleasant case study.
Workshop Outline	The pedagogical approach consists of using the EV reports to reconstruct the actual project execution, then to deduce what should have been the project management approach to avoid possible reporting pitfalls. By going backwards that way, participants will understand the importance of setting up a precise framework for managing EV and risks at the earlier stages of the project.
Target Audience	All project stakeholders who require a working knowledge of setting up a precise framework for managing EV and risks.
Pre-Requisite	The course assumes that the delegates have prior knowledge of EVM terms & calculations.
Course Numbers	Limited to 10 People

**4. Organisational EVM Implementation: The Challenges.** *John Flaherty OTC Optima*

Workshop Objectives	<ol style="list-style-type: none"> <li>1. To identify the specific challenges in implementing EVM into an organisation.</li> <li>2. To understand the scope that should be addressed during an organisational implementation.</li> </ol>
Workshop Outline	The workshop will provide a framework for discussion of the challenges using some presentation material and syndicate exercises. Principal areas covered will be the role of Sponsors & Stakeholders, Benefits, Threats, the Portfolio/Programme Management relationship and the EVM Assurance framework.
Target Audience	All project, programme and business management personnel who require an understanding of the areas that require consideration as part of an organisational implementation.
Pre-Requisite Or Equipment	The course assumes that the delegates have prior knowledge of EVM.
Course Numbers	Limited to 10 People

# EVA XIII College Workshops

Day 2 - Thursday 12<sup>th</sup> June

In-depth and small group training workshops offered by respected and experienced practitioners. Each workshop starts at 10am and finishes at 4pm.

**You can only do one workshop from each day. Remember to put the number of that workshop on the order form.**

## 5. Developing your Schedule for Earned Value Workshop. *Jim Malkin - Deltek UK Ltd*

Workshop Objectives	<ol style="list-style-type: none"><li>1. To set-up your schedule for earned value.</li><li>2. Suggest valid Earned Value Techniques for your schedule activities.</li><li>3. Show how easy it is link your schedule to an Earned Value Engine and step through the periodic reporting cycle.</li></ol>
Workshop Outline	The course will go through a schedule you bring along (not any pre-prepared schedule of ours) and highlight the changes you need to make to your schedule in order for it to provide good earned value data.
Target Audience	All planners, CAMs and business management personnel who require a working knowledge of the way to set-up a schedule for Earned Value.
Pre-Requirement	The course assumes that the delegates have limited knowledge of EVM requirements and basic scheduling experience.
Course Numbers	Limited to 6 People

## 6. Advanced use of Earned Value Management: a practical approach based on real life experiences

*Alexandre Rodrigues, CEng, Ph.D. Prof. PMP Executive Partner PMO Consulting Group Lisbon, Portugal*

Workshop Objectives	In this workshop, we will present and explore an extended version of Earned Value Management along with a discussion about the critical factors for successful implementation in the field. We will give particular attention to the use of visual representation techniques for effective communication with stakeholders. We will also present a data quality model aimed at measuring and ensuring the consistency of the data in an EVM system.
Workshop Outline	The practical application of this project controlling technique was for a long period of time confined to specific industries and types of projects, particularly to the defense sector and to large projects. This phenomenon has mistakenly created the perception that EVM is only applicable (or worth applying), to these scenarios. Our practical experience over the last ten years of using and applying EVM in the field, has demonstrated exactly the contrary: Earned Value can be used effectively in any type of project and industry sector, very often requiring little effort in small projects. Ranging from small consulting projects with durations from 1 to 2 months and teams of 1 to 3 consultants, to large multi-year complex projects in the defense or telecommunications industries, we have been using Earned Value successfully. This is not only because Earned Value is, per se, a very complete and effective method for project performance measurement and controlling, but also because we developed a set of unique extensions to the basic method along with additional supporting tools and procedures.
Target Audience	All project, programme and business management personnel who require a working knowledge of the principles, practices & interpretation of Earned Value performance data.
Pre-Requirement Or Equipment	The course assumes that the delegates have prior knowledge of EVM terms & calculations and experience of the factors that govern the integrity of the EV data.
Course Numbers	Limited to 10 People

### 7. Earned Value Management Data Analysis Workshop. *Paul Hill OTC Optima*

Workshop Objectives	<ol style="list-style-type: none"> <li>To consolidate existing Earned Value Management knowledge focusing on the skills needed to conduct project Analysis using EVM.</li> <li>To introduce delegates to advanced Earned Value based analysis techniques</li> <li>To provide practical experience of identifying and managing factors that will positively &amp; negatively influence reported performance</li> </ol>
Workshop Outline	The course is based upon the application of EV analysis techniques to a case study project. A significant amount of time will be dedicated to hands-on analysis.
Target Audience	All project, programme and business management personnel who require a working knowledge of the principles, practices & interpretation of Earned Value performance data.
Pre-Requisite	The course assumes that the delegates have prior knowledge of EVM terms & calculations and experience of the factors that govern the integrity of the EV data.
Course Numbers	Limited to 10 People

### 8. Applying Earned Value Concepts to Commercial [IT] Projects. *Kym Henderson – PMI College of Performance Management*

Workshop Objectives	The workshop objective is to provide participants with the knowledge and tools necessary to apply simplified Earned Value techniques into your own project management practice, should you decide to do so.
Workshop Outline	<p>The workshop will allow you to develop and enhance the contributions you make to your organisation by integrating into your corporate environment the use of simplified Earned Value techniques which will enable you to:</p> <ul style="list-style-type: none"> <li>Use the earned value methodology to gain an integrated and objective view of project performance from cost, schedule and physical progress (technical achievement) perspectives</li> <li>Calculate and interpret the basic earned value metrics and indices (cost and schedule) to help confirm project performance to date, and provide proactive guidance into areas which may require corrective action</li> <li>Understand and be able to use advanced earned value techniques, including calculating and interpreting the earned value statistically generated Independent cost estimates at completes (IEACs), which are based on the actual historic performance of the project to date</li> <li>Understand and be able to use Earned Value's "early warning signals" to identify and proactively manage project performance issues, particularly project "cost risk" while most of the project cost budget is still intact</li> </ul>
Target Audience	The course is primarily intended for persons with responsibility for managing projects (project or program managers), or associated with the management of projects. The latter has included persons with responsibility for project oversight and governance (e.g. project directors and members of program management offices)
Pre-Requisite Or Equipment	Notebook Computer with CD ROM or USB port and Microsoft Excel and Adobe Acrobat Reader. Microsoft Project is optional.
Course Numbers	Limited to 20 People

**9. Being in the Moment - giving yourself permission to be more present - in meetings, presentations and day-to-day interactions with your clients/teams. *Didi Hopkins, Chrissie Tiller. CTA Elegant Solutions***

Workshop Objectives	To look at ways in which you can begin to harness your own personality, presence and purpose to have positive personal impact on those around you. To hone your listening, speaking and physical skills. To explore ways in which theatre techniques such as improvisation, trying things out, making mistakes and creating space for the unexpected to happen - can help you meet with new challenges.
Workshop Outline	This is an experiential course based on practical approaches to success. It will cover: <ul style="list-style-type: none"> <li>● voice and body language</li> <li>● what makes people interesting and engaging</li> <li>● thinking on your feet</li> <li>● confidence and assertiveness</li> <li>● pitching your ideas</li> </ul> The session will include practical pointers for how to carry the experience back to the workplace
Target Audience	All project, programme and business management personnel who want to learn theatre based techniques to improve their personal impact, develop better influencing skills and learn to create trust and rapport with both clients and project teams.
Pre-Requisite	This is a course where the more you put in, the more you gain. There is no equipment, no flip charts, no power-point presentations - active participation is the key to an effective outcome.
Course Numbers	Limited to 12 People

**10. Earned Value Management - Advances & Extensions. *Walt Lipke PMI – Oklahoma City (USA) Chapter***

Workshop Objectives	To impart recent advances in EVM application and the furtherance of the Earned Schedule (ES) extension. The coverage will include: (1) Forecasting of final cost and duration using statistical methods; (2) Schedule Adherence – a new measure derived from ES; and (3) Evaluation of forecasting using ES in comparison to 3 commonly used EVM methods.
Workshop Outline	The workshop is an assemblage of 3 separate research areas as described in the objectives. The spreadsheet calculators used to demonstrate the advances and extensions will be available to attendees for in class exercises, experimentation and discussion. The spreadsheets will be provided to all attendees as a take away CD.
Target Audience	Project Managers, EVM analysts, and anyone having interest in EVM and its application to project management and oversight.
Pre-Requisite	The course assumes that attendees have prior knowledge of EVM terms & calculations. Prior knowledge of Earned Schedule and statistical methods is not required. Laptop computers are encouraged. Grouping of those attending without laptops to those that have them is expected.
Course Numbers	Limited to 10 People

# EVA XIII College Workshops

Day 3 - Friday 13<sup>th</sup> June

In-depth and small group training workshops offered by respected and experienced practitioners. Each workshop starts at 10am and finishes at 4pm.

**You can only do one workshop from each day. Remember to put the number of that workshop on the order form.**

## 11. Psychology for Projects – from chaos to harmony. *Dr Stephen Benton and Dr David Rogers.*

Workshop Objectives	<ol style="list-style-type: none"> <li>1. To remind course delegates of some project fundamentals, for example team troubles and how information gets degraded, decision making quality drops and conflict grows.</li> <li>2. To present examples of problems in teams like poor conflict resolution, time wasting, communications failures and ways to build behavioural counters to them.</li> <li>3. To provide a methodology (Insights) for making explicit and manageable those differences of personality and cognitive style that distort working relationships.</li> <li>4. To work through examples of failed and failing communication, highlight how to identify sources and how to recover from them</li> <li>5. Provide a strategy for building good teams</li> </ol>
Workshop Outline	The course content uses a range of metaphors and musical analogies in order to promote access to psychological principles. Exercises focus learning within areas of failed communications, poor conflict resolution, stress behaviour and time wasting.
Target Audience	All project leaders and team members looking for a fresh approach to teamship, or experienced project team members looking for the latest thinking in understanding self and others
Pre-Requisite	The course assumes experience of project team leadership/and/or membership and delegates will need to complete an Insights Discovery Preference Evaluator in preparation for the workshop.
Course Numbers	Whilst there is no upper limit on course numbers a pre-course questionnaire needs to be returned from all delegates five working days before the workshop

## 12. Earned Schedule. *Kym Henderson – PMI College of Performance Management , Walt Lipke*

Workshop Objectives	<p>The workshop objective is to demonstrate:</p> <ul style="list-style-type: none"> <li>● Earned Schedule (ES) which provides schedule performance measures in units of time from Earned Value Management (EVM) data</li> <li>● Analytical techniques from the ES indicators which provide a status and predictive ability for schedule, analogous to EVM for cost.</li> <li>● The integration of the time based ES measures, traditional EVM and network schedule analysis.</li> </ul>
Workshop Outline	<p><b>Part 1 of the Workshop will cover:</b></p> <ul style="list-style-type: none"> <li>● The Earned Schedule concept, metrics, indicators, predictors and terminology</li> <li>● Concept verification</li> <li>● Prediction comparisons</li> <li>● Demonstrate an ES Calculator and Analysis tool</li> </ul> <p><b>Part 2 will cover the ES re-baseline effects then cover the “bridging” analytical techniques between Earned Schedule and traditional integrated schedule analysis including:</b></p> <ul style="list-style-type: none"> <li>● The critical path study where the critical path calculated completed date was compared to the ES predicted completion date on a small but time critical software development project</li> <li>● Network schedule analysis using Earned Schedule</li> </ul> <p>An electronic distribution of the currently available Earned Schedule papers, presentations, calculator and analysis tool will be available for participants.</p>
Target Audience	The course is primarily intended for EVM practitioners or persons with a knowledge of EVM responsible for managing projects (project or program managers), or associated with the management of projects. The latter has included persons with responsibility for project oversight and governance (e.g. project directors and members of program management offices)
Pre-Requisite Or Equipment	Notebook Computer with CD ROM or USB port and Microsoft Excel and Adobe Acrobat Reader. A basic knowledge of EVM will be required including the EVM metrics and IEAC cost predictors
Course Numbers	Limited to 20 People

