



DOCUMENT #	0810-0810-005-B
REVISION #	1.0
TITLE	QUALITY CONTROL PROCESS
EFFECTIVE DATE	5/12/15

## QUALITY CONTROL PROCESS

### 1.0 SCOPE

The Enterprise Project Management Office (EPMO) established overarching Quality Policy, Quality Objectives in the [0100-0100-005-QMS EPMO QUALITY MANUAL](#). This procedure defines specific EPMO Information Technology (IT) Project Performance Metrics and measurements, and the methods used to monitor, detect, assess, correct and record IT Project performance Deficiencies throughout the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](#). When performance Deficiencies are identified the [0600-0600-005-B CORRECTIVE ACTION PROCESS](#) is implemented, resulting in opportunities to improve IT Project performance.

### 2.0 OWNER

2.1 The EPMO Manager owns this procedure. No changes, additions or alterations may be made without the owner's written approval.

### 3.0 REFERENCE DOCUMENTS

DOCUMENT IDENTIFICATION	DOCUMENT TITLE
<a href="#">PMBOK</a>	<a href="#">A GUIDE TO THE PROJECT MANAGEMENT BODY OF KNOWLEDGE - 5TH ED</a>
<a href="#">0100-0100-005-QMS</a>	<a href="#">EPMO QUALITY MANUAL</a>
<a href="#">0100-0800-010-B</a>	<a href="#">FORMS AND RECORDS CONTROL</a>
<a href="#">0300-0300-005-B</a>	<a href="#">PROJECT MANAGEMENT PROCESS</a>
<a href="#">0300-0310-005-C</a>	<a href="#">PROJECT INITIATION</a>
<a href="#">0300-0310-015-C</a>	<a href="#">PROJECT FINANCIAL ASSESSMENT</a>
<a href="#">0300-0310-030-C</a>	<a href="#">COST ESTIMATION</a>
<a href="#">0300-0360-005-C</a>	<a href="#">PROJECT CHANGE REQUEST</a>
<a href="#">0300-0370-005-C</a>	<a href="#">PROJECT WEEKLY STATUS REPORT</a>
<a href="#">0600-0600-005-B</a>	<a href="#">CORRECTIVE ACTION PROCESS</a>
<a href="#">0700-0700-005-B</a>	<a href="#">PREVENTIVE ACTION PROCESS</a>
<a href="#">0800-0800-005-B</a>	<a href="#">QUALITY ASSURANCE PROCESS</a>

### 4.0 ASSOCIATED FORMS

FORMS IDENTIFICATION	FORM TITLE
<a href="#">0300-0310-015-D</a>	<a href="#">PROJECT FINANCIAL ASSESSMENT FORM</a>
<a href="#">0300-0360-005-D</a>	<a href="#">PROJECT CHANGE REQUEST FORM</a>
<a href="#">0300-0370-005-D</a>	<a href="#">PROJECT WEEKLY STATUS REPORT</a>
<a href="#">0600-0600-005-D</a>	<a href="#">CORRECTIVE ACTION FORM</a>
<a href="#">0810-0810-005-D</a>	<a href="#">QUALITY CONTROL DECISION POINTS</a>

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## 5.0 DEFINITIONS

- **BASIS OF ESTIMATE:** [see Glossary of Terms and Definitions](#)
- **DEFICIENCY:** [see Glossary of Terms and Definitions](#)
- **QUALITY ASSURANCE:** [see Glossary of Terms and Definitions](#)
- **QUALITY CONTROL:** [see Glossary of Terms and Definitions](#)

## 6.0 PROCEDURE

Quality Control focuses on the detection, correction and elimination of IT Project performance Deficiencies. The EPMO uses various measurement methods established by the Project Management Institute (PMI) in the [PMBOK](#). Earned Value Measurements such as Cost Performance Index (CPI) and Schedule Performance Index (SPI) are used to define “within budget” and “on schedule” IT Project performance. Basis of Estimates (BOEs) are used to determine when the overall IT Project Cost or Schedule is “off track”, requiring a [0300-0360-005-D PROJECT CHANGE REQUEST FORM](#). In addition, Decision Point (DP) actions are measured to determine if DP processing is within the Service Level Commitments (SLCs) established in [0810-0810-005-D QUALITY CONTROL DECISION POINTS](#). All measurements are driven by the Project Manager (PM) providing weekly project status updates in accordance with [0300-0370-005-C PROJECT WEEKLY STATUS REPORT](#). The Project Management Advisor (PMA) is also a key contributor to the success of the Quality Control Process. The PMA reviews Cost and Schedule Variances, BOE Variances, DP SLC performance and Change Requests to ensure IT Projects are performing within established EPMO Thresholds. The PMA follows the procedure defined below to monitor and assess IT Projects to quickly identify, correct and eliminate IT Project performance Deficiencies.

*(Note: All Deficiencies will result in the implementation of the [0600-0600-005-C CORRECTIVE ACTION PROCESS](#).)*

### 6.1 Project Weekly Status Report

Proper assessment of an IT Project requires the PM to complete the [0300-0375-005-D PROJECT WEEKLY STATUS REPORT](#) throughout the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](#). The completed Project Weekly Status Report provides the TOUCHDOWN System the data to generate the CPI and SPI Earned Value Measurements.

- 6.1.1 Every Monday the PMA assesses the Project Weekly Status Report prepared by the PM in accordance with [0300-0370-005-C PROJECT WEEKLY STATUS REPORT](#). If the Report was not submitted the PMA will create a “Turnaround Time” Deficiency.
- 6.1.2 The focus of the PMA review is CPI, SPI and Key Risks. If the PMA determines a Deficiency exists (i.e. “Cost Variance”, “Schedule Variance” or “Risk”) based on the condition assessed, Corrective Action shall be initiated in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).
- 6.1.3 If the PMA determines no Deficiency exists and Corrective Action is not warranted based on the assessment, Preventive Action may be initiated in accordance with the [0700-0700-005-B PREVENTIVE ACTION PROCESS](#).

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## 6.2 Cost Performance Index (CPI)

The TOUCHDOWN System calculates and displays the CPI Earned Value Measurement. The PM and PMA review Cost Variances weekly following the [0300-0370-005-C PROJECT WEEKLY STATUS REPORT](#) procedure. When an IT Project reaches the EPMO Variance Threshold for Cost, the PM uses the [0300-0360-005-C PROJECT CHANGE REQUEST](#) procedure to request a change (increase or decrease) to the Cost Estimate.

6.2.1 CPI Variances are generated by the TOUCHDOWN System based on inputs from the PM and State cost accounting and management systems. These measurements are used to determine Cost Variances and are defined in [0810-0810-005-B QUALITY CONTROL PROCESS](#). The PMA and PM assess CPI Variances on a weekly basis.

6.2.2 The PMA uses the TOUCHDOWN System to track CPI over time. The PMA assesses CPI looking at a trend (time period) of at least 60 days. If the CPI is  $< .90$  or  $> 1.2$ , the PMA creates a “Cost Variance” Deficiency and initiates Corrective Action in accordance with the [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

## 6.3 Schedule Performance Index (SPI)

The TOUCHDOWN System calculates and displays the SPI Earned Value Measurement. The PM and PMA review Schedule Variances weekly following the [0300-0370-005-C PROJECT WEEKLY STATUS REPORT](#) procedure. When an IT Project reaches the EPMO Variance Threshold for Schedule, the PM uses the [0300-0360-005-C PROJECT CHANGE REQUEST](#) procedure to request a change (increase or decrease) to the Schedule Estimate.

6.3.1 SPI Variances are generated by the TOUCHDOWN System based on inputs from the PM and State cost accounting and management systems. These measurements are used to determine Schedule Variances and are defined in [0810-0810-005-B QUALITY CONTROL PROCESS](#). The PMA and PM assess SPI Variances on a weekly basis.

6.3.2 The PMA uses the TOUCHDOWN System to track SPI over time. The PMA assesses SPI looking at a trend (time period) of at least 60 days. If the SPI is  $< .90$  or  $> 1.2$ , the PMA creates a “Schedule Variance” Deficiency and initiates Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

## 6.4 Basis of Estimate (BOE) Variances

All IT Projects will establish Cost and Schedule Estimates as required in [0300-0310-015-C PROJECT FINANCIAL ASSESSMENT](#) and defined in [0300-0310-030-C COST ESTIMATION](#). The BOE’s are “Initial”, “Refined” and “Baseline”, and have defined permissible variances.

6.4.1 BOE Variances are generated by the TOUCHDOWN System based on inputs from the PM and State cost accounting and management systems. These measurements are used to determine Cost and/or Schedule Variances. The PMA and PM assess BOE Variances weekly.

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6.4.2 The PMA uses the TOUCHDOWN System to track BOE Variances over time. If the IT Project trends outside the established BOE thresholds, the PMA creates a “Cost Variance” or “Schedule Variance” Deficiency and initiates Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

**6.5 Decision Point Turnbacks and Service Level Commitments (SLCs)**

During the [0300-0310-005-C PROJECT INITIATION](#) phase the PMA consults with the PM to determine the required DPs. The process establishes the DPs and references their SLCs as defined in [0810-0810-005-D QUALITY CONTROL DECISION POINTS](#). As an IT Project progresses through its Life-Cycle, the PMA reviews assigned DPs to verify compliance with standards established herein, and requisite SLCs standards defined in [0810-0810-005-D QUALITY CONTROL DECISION POINTS](#).

6.5.1 The PM is responsible for submitting the required information for the review of a DP based on a due date in the Project Schedule. If the PM fails to meet the DP due date the PMA creates an “SLC” Deficiency and initiates Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

6.5.2 If the assigned reviewer completes their actions within the defined SLC and the DP is not approved, the PMA creates an “SLC” Deficiency stating the reason for non-approval and initiates Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

*(Note: The SLC for the DP returns to review day 1.)*

6.5.3 If the assigned reviewer does not complete their actions within the defined SLC, the PMA creates a “SLC” Deficiency and initiates Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

**6.6 Change Request Re-Baseline**

When a [0300-0360-005-C PROJECT CHANGE REQUEST](#) results in a re-baseline of Cost or Schedule, the PMA will create a “Change Request” Deficiency and initiate Corrective Action in accordance with [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

*(Note: The Project Change Request procedure establishes Agency and EPMO Thresholds for action on Cost/Schedule Variances. The concept is that Agencies should correct the Variance - I.e. Preventive Action - before the problem escalates and requires EPMO intervention - I.e. Corrective Action.)*

**6.7 Escalation of Deficiencies**

As an IT Project is assessed and Deficiencies are identified, the EPMO Manager is responsible for escalating Deficiencies as required in [0600-0600-005-B CORRECTIVE ACTION PROCESS](#).

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## 6.8 EPMO Project Performance Metrics and Measurements

Performance Metric	Measurement	Process or System
Project Weekly Status Report Delivered and Assessed on Time	Due End of Day Friday	<a href="#">0300-0375-005-C PROJECT WEEKLY STATUS REPORT TOUCHDOWN System</a>
Cost Performance Index (CPI)	Earned Value (EV) / Actual Cost (AC)	TOUCHDOWN System
Schedule Performance Index (SPI)	Earned Value (EV) / Planned Value (PV)	TOUCHDOWN System
Basis of Estimate (BOE)	-25% of Project Initial Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	-25% of Project Initial Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+75% of Project Initial Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+75% of Project Initial Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	-10% of Project Refined Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	-10% of Project Refined Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+25% of Project Refined Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+25% of Project Refined Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	-5% of Project Baseline Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	-5% of Project Baseline Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+10% of Project Baseline Budget	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Basis of Estimate (BOE)	+10% of Project Baseline Schedule	<a href="#">0300-0310-015-C PROJECT FINANCIAL ASSESSMENT TOUCHDOWN System</a>
Decision Point (DP) Due Date	Due date is <= Today's date	<a href="#">0810-0810-005-D QUALITY CONTROL DECISION POINTS TOUCHDOWN System</a>
Decision Point (DP) Required Information Not Submitted	Approver Rejection	<a href="#">0810-0810-005-D QUALITY CONTROL DECISION POINTS</a>
Decision Point (DP) Not Approved	Approver Rejection	<a href="#">0810-0810-005-D QUALITY CONTROL DECISION POINTS</a>
Decision Point (DP) Service Level Commitment (SLC) Not Met	Service Level Commitment (SLC) Due Date <= Today's Date	<a href="#">0810-0810-005-D QUALITY CONTROL DECISION POINTS TOUCHDOWN System</a>
Change Request to Re-Baseline	Project Baseline Budget compared to Change Request Budget (+ or -)	<a href="#">0300-0360-005-C PROJECT CHANGE REQUEST</a>
Change Request to Re-Baseline	Project Baseline Schedule compared to Change Request Schedule (+ or -)	<a href="#">0300-0360-005-C PROJECT CHANGE REQUEST</a>

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## 6.9 Earned Value Measurements - Components and Calculation Methods

6.9.1 **Actual Cost (AC)** - The actual costs incurred by the project as of a certain point in time. Usually, AC is used to answer the question: “How much has been spent on the project as of today?”

6.9.1.1 AC is calculated as follows:

**Actual Cost (AC) = Sum of all costs incurred by the project to date**

6.9.1.2 AC calculation *Example:*

*Tom is the PM for a project to install a new Wi-Fi network on the Dix campus. The project has a budget of \$2.5 million and involves numerous contractors. Tom has budgeted \$1.2 million for Wi-Fi equipment and \$1.1 million for installation, employee laptop updates and training costs. He has also budgeted \$200,000 for miscellaneous costs. The project team has just begun installing the equipment needed - starting with the Wi-Fi antennas. The project has spent \$400,000 on Wi-Fi equipment, \$50,000 on site surveys, \$3,000 on team meetings and team building sessions. Tom will also sign a contract for an additional ten Wi-Fi antennas for \$30,000 tomorrow.*

6.9.1.3 What is the current AC of the example project? *Answer:* \$453,000.

6.9.1.4 How was the example AC calculated?

Actual Cost (AC) = \$400,000 + \$50,000 + \$3,000 = \$453,000

*(Note: Why isn't the AC \$483,000? The contract for the additional ten Wi-Fi antennas is being signed tomorrow and has not yet been invoiced.)*

6.9.2 **Earned Value (EV)** - The estimated value of the work completed on a project as of today. If the project stopped today, the EV would show the value that it has produced.

6.9.2.1 EV is calculated as follows:

**Earned Value (EV) = Percent Complete x Budget at Completion (BAC)**

6.9.2.2 EV calculation *Example:*

*Bill is the PM on a project to relocate his agency's data center from a closet to the State Western Data Center. After six months of work, the project is 27% complete. At the start of the project, Bill estimated that it would cost \$50,000,000.*

6.9.2.3 What is the current EV of the example project? *Answer:* \$13,500,000.

6.9.2.4 How was the example EV calculated?

The Percent Complete = 27% (0.27). The Budget at Completion (BAC) = \$50,000,000.  
Earned Value (EV) = 0.27 x \$50,000,000 = \$13,500,000

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6.9.3 **Planned Value (PV)** - The estimated value of the work to be completed on a project within a defined time period.

6.9.3.1 PV is calculated as follows:

$$\text{Planned Value (PV)} = \text{Planned Percent Complete} \times \text{Budget at Completion (BAC)}$$

6.9.3.2 PV calculation *Example*:

*Jenny is the PM on a project to build a new mobile web application. The project is expected to last 10 months. The estimated total cost is \$2,300,000.*

6.9.3.3 What is the PV of the example project at 5 months? Answer: \$1,150,000.

6.9.3.4 How was the example PV calculated?

The Planned Percent Complete is the percentage of the project that is planned to be complete; in this case, 5 months / 10 months = 0.5 (50%). The Budget at Completion (BAC) is the estimated total cost of the project; in this case, BAC = \$2,300,000.

$$\text{Planned Value (PV)} = 0.5 \times \$2,300,000 = \$1,150,000$$

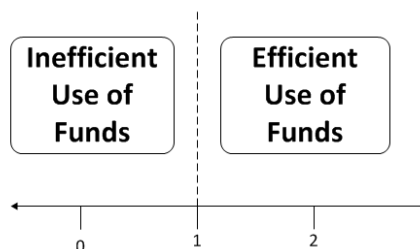
6.9.4 **Cost Performance Index (CPI)** - A measurement of a project’s actual cost performance relative to plan.

6.9.4.1 CPI is calculated as follows:

$$\text{Cost Performance Index (CPI)} = \text{Earned Value (EV)} / \text{Actual Cost (AC)}$$

6.9.4.2 What does CPI mean? - The result of the CPI calculation is a number. What does this number mean?

- A value less than one means the project is underperforming in costs. Ex: CPI of 0.7 means the PM is earning \$0.70 of value in return for each \$1.00 spent.
- A CPI of one means the project is on track with the cost plan. Ex: CPI of 1 means the PM spent \$1.00 on the project and received \$1.00 of value in return.
- A value greater than one means the project is performing above planned costs. Ex: CPI of 1.4 means the project is earning \$1.40 of value in return for each \$1.00 spent.
- The Cost Performance Index answers the question: “What is the actual cost performance relative to the plan?”



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6.9.4.3 CPI calculation *Example:*

*Sue is the PM for a project to implement a new secure driver’s license system. The estimated value of the work completed on the project so far is \$405,000. The total cost of the project is expected to be \$650,000. So far the project has cost \$325,000.*

6.9.4.4 What is the CPI and what does it indicate about Sue’s project?

Answer: The CPI is 1.25; for every \$1.00 spent on Sue’s project, \$1.25 of value is being produced in return.

6.9.4.5 How was the example CPI calculated?

The Earned Value (EV) is \$405,000. The Actual Cost (AC) is \$325,000.  
 Cost Performance Index (CPI) =  $\$405,000 / \$325,000 = 1.25$

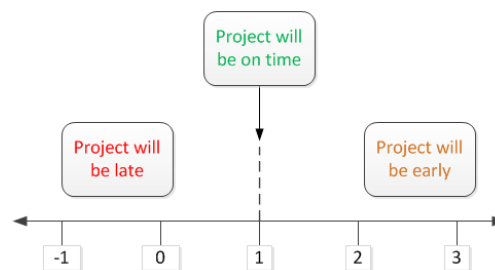
6.9.5 **Schedule Performance Index (SPI)** - A measurement of project schedule performance used to determine actual schedule progress relative to plan.

6.9.5.1 SPI is calculated as follows:

**Schedule Performance Index (SPI) = Earned Value (EV) / Planned Value (PV)**

6.9.5.2 What does SPI mean? - The result of the SPI calculation is a number. What does this number mean?

- A value less than one means the project is behind schedule relative to plan. Ex: A trending SPI of 0.8 means the project is projected to finish behind schedule (late).
- An SPI of one means the project is projected to finish on schedule with the plan.
- A value greater than one means the project is ahead of planned schedule. Ex: A trending SPI of 1.2 means the project is projected to finish ahead of schedule (early).
- The Schedule Performance Index answers the question: “When is the project projected to finish relative to the plan?”



6.9.5.3 SPI calculation *Example:*

*Frank is the PM for an application development project to create a new web interface for a licensing system. The estimated value of the work completed thus far is \$116,000. The planned value of the project is \$125,000.*

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6.9.5.4 What is the SPI and what does it indicate about Frank's project?

Answer: The SPI is 0.93; Frank's project is slightly behind planned schedule.

6.9.5.5 How was the example SPI calculated?

The Earned Value (EV) is \$116,000. The Planned Value (PV) is \$125,000.

Schedule Performance Index (SPI) =  $\$116,000 / \$125,000 = 0.93$

## 7.0 RECORDS

7.1 Unless otherwise specified in this Procedure/QWI, Records shall be maintained in accordance with [0100-0800-010-B FORMS AND RECORDS CONTROL](#) procedure.

## 8.0 REASON FOR CHANGE

8.1 Initial issue.

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