



Shared Services Group
Site Services

Major Projects

Title of Project

Project Manager:

Date:

Project Title

Project Description / Scope Statement

Shared Services Group | Site Services | Organization Name

- § **Provide a brief description of the project scope.**
- § Supplement with illustrations/photos if available

Project Title

Photographs / Graphics

Shared Services Group | Site Services | Organization Name

Project Title

Executive Summary

YE	PC	
G	G	
CPI	SPI	Overall
1.00	0.9	G

Shared Services Group | Site Services | Organization Name

Comments

§

Cost Summary (dollars in thousands)

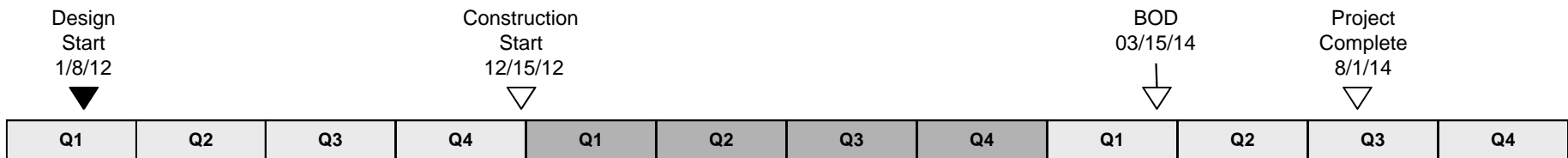
§ Total Budget: \$ XXX.XXX Capital
 \$ XX,XXX Expense

§ Actuals: \$ XX.XXX Capital
 \$ XX.XXX Expense

Contracting Strategy:

§ Design - (Example T&M, Fixed price...)

§ Construction -



Project Manager:
 Last Update:

Project Title

Major Accomplishments

Shared Services Group | Site Services | Organization Name

§ Accomplishments

§ Describe accomplishments since last report

§ Look Ahead

§ Describe activities to be accomplished before the next report and/or other near term activities/milestones.

Project Title

Performance Summary

Shared Services Group | Site Services | Organization Name

Project Phase	Phase Status		SOW Technical		Cost CPI:		Schedule SPI:		Comments
	Prev	Current	Prev	Current	Prev	Current	Prev	Current	
Project Name	G	G	G	G	G	G	G	G	
WBS Level 2	G	Y	G	G	G	G	G	G	
WBS Level 2	G	G	G	G	G	Y	G	G	
WBS Level 2	G	G	G	G	G	G	G	G	
WBS Level 2	G	G	G	G	G	G	G	G	
WBS Level 2	G	G	G	G	G	G	G	G	
WBS Level 2	G	G	G	G	R	G	G	G	

G Plans in Place / Progressing to Plan

Y Off Plan / Recovery Plan in Place

R Off Plan / No Plan for Recovery

N Activity Not Started

Project Title

Baseline Schedule Summary

Tier I Milestones

Shared Services Group | Site Services | Organization Name

Project Lifecycle		Plan				Execute				Close							
	Summary Status		Prelim Reqmts		Detail Reqmts		Design		Const.		Comm & BOD		Complete		Comments	Forecast	
	Prev	Cur	Prev	Cur	Prev	Cur	Prev	Cur	Prev	Cur	Prev	Cur	Prev	Cur		YE	PC
Project Name	Y	G	Y	G	G	Y	G	G	Y	G						G	G
WBS Level 2	G	G	G	G	G	G	G	G								G	G
WBS Level 2	G	G	Y	G	G	G										G	G
WBS Level 2	Y	G	G	G	G	G	G	G	Y	G						G	G
WBS Level 2	G	G	Y	G	G	G										G	G



Plans in Place / Progressing to Plan



Off Plan / Recovery Plan in Place



Off Plan / No Plan for Recovery



Activity Not Started

Project Title

Internal Resource / Vendor Performance

Shared Services Group | Site Services | Organization Name

Internal Resources	Cost		Schedule		Quality		Comments
	prev	current	prev	current	prev	current	
Planning	G	G	R	Y	G	G	
Project Administration	G	G	G	G	G	G	
Engineering	G	G	G	G	G	G	
Construction Management	G	G	G	G	G	G	
Supplier Mgmt	G	G	G	G	G	G	
Finance	G	G	G	G	G	G	
SHEA	G	G	G	G	G	G	

Vendor Performance	Cost		Schedule		Quality		Comments
	prev	current	prev	current	prev	current	
	G	G	G	G	G	G	
	G	G	G	G	G	G	
	G	G	G	G	G	G	
	G	G	G	G	G	G	

Use of this slide is OPTIONAL

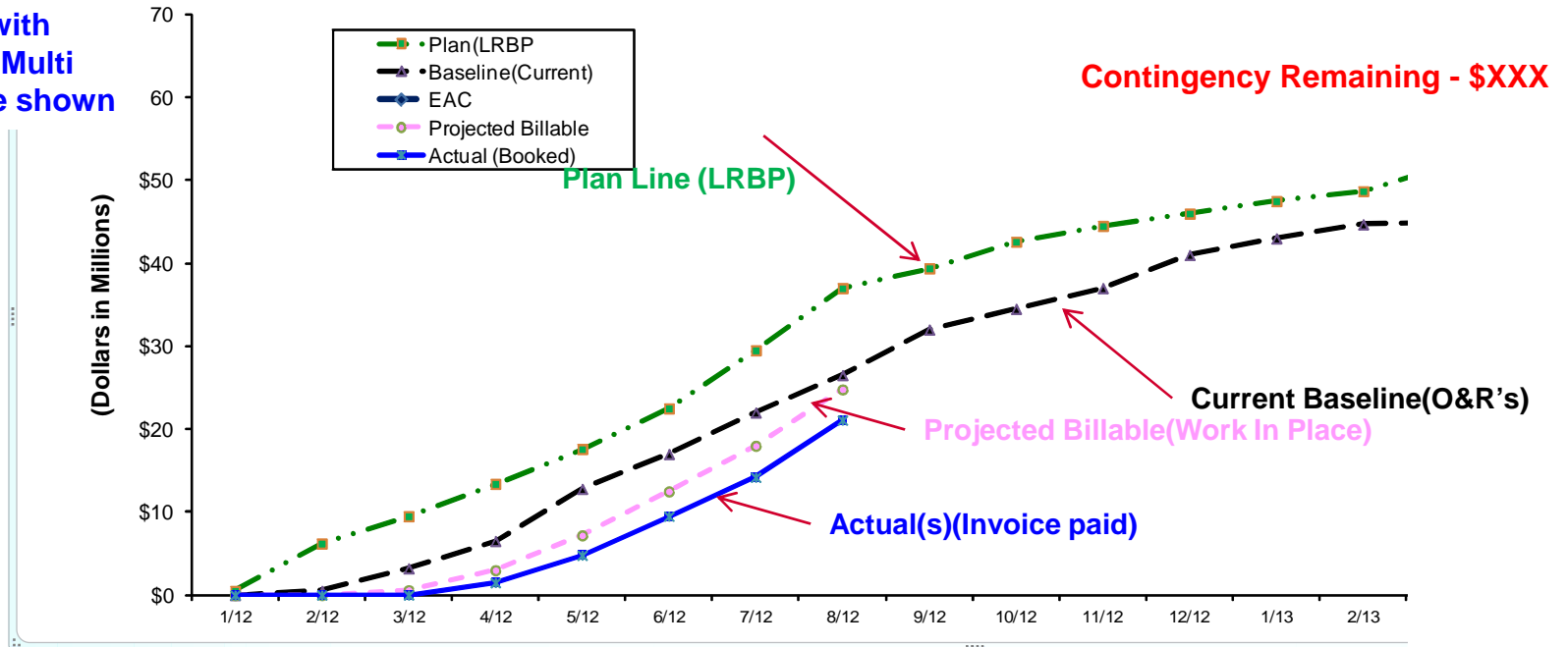
- G Plans in Place / Progressing to Plan
- Y Off Plan / Recovery Plan in Place
- R Off Plan / No Plan for Recovery
- N Activity Not Started

Project Tile

Cash Flow Chart – Total Expense & Capital

Shared Services Group | Site Services | Organization Name

Cash flow chart with variances noted. Multi year performance shown



Expenditures	1/12	2/12	3/12	4/12	5/12	6/12	7/12	8/12	9/12	10/12	11/12	12/12	1/13	2/13
Plan(LRBP)	0.50	6.20	9.50	13.40	17.60	22.50	29.50	37.00	39.40	42.60	44.50	46.00	47.50	48.70
Baseline(Current)	0.00	0.50	3.20	6.50	12.80	17.00	22.00	26.50	32.00	34.50	37.00	41.00	43.00	44.70
EAC														
Projected Billable	0.00	0.00	0.60	3.00	7.20	12.50	18.00	24.80						
Actual (Booked)	0.00	0.00	0.00	1.50	4.80	9.50	14.20	21.10						

Actuals Variance	1/12	2/12	3/12	4/12	5/12	6/12	7/12	8/12	9/12	10/12	11/12	12/12	1/13	2/13
Variance to Plan	(0.50)	(6.20)	(9.50)	(11.90)	(12.80)	(13.00)	(15.30)	(15.90)						
Variance to Baseline	0.00	(0.50)	(3.20)	(5.00)	(8.00)	(7.50)	(7.80)	(5.40)						

Project Title

Financial Summary

Shared Services Group | Site Services | Organization Name

Project Cost Summary (x \$1,000)

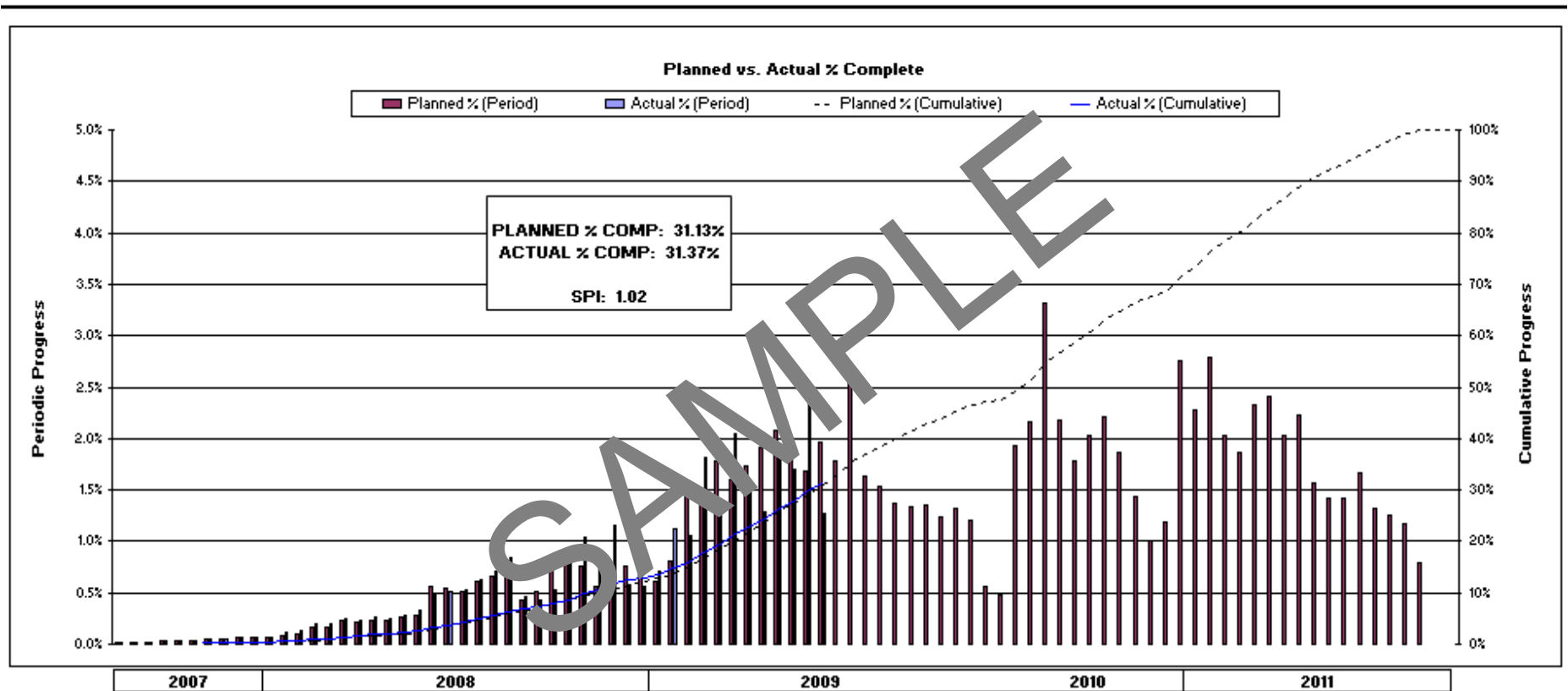
	2010 Capital	2010 Expense	2011 Capital	2011 Expense	2012 Total
Budget	\$0	\$0	\$0	\$0	\$0
Authorized	\$0	\$0	\$0	\$0	\$0
Actuals	\$0	\$0	\$0	\$0	\$0
Committed	\$0	\$0	\$0	\$0	\$0
Anticipated Commitments	\$0	\$0	\$0	\$0	\$0
Estimate at Completion (EAC)	\$0	\$0	\$0	\$0	\$0
Variance (Budget-EAC)	\$0	\$0	\$0	\$0	\$0
Contingency Remaining	\$0	\$0	\$0	\$0	\$0
Management Reserve	\$0	\$0	\$0	\$0	\$0

Project Title

Earned Value – Schedule Data

Shared Services Group | Site Services | Organization Name

CNT-R-09XXX Sample EVM Project
Earned Value Management System

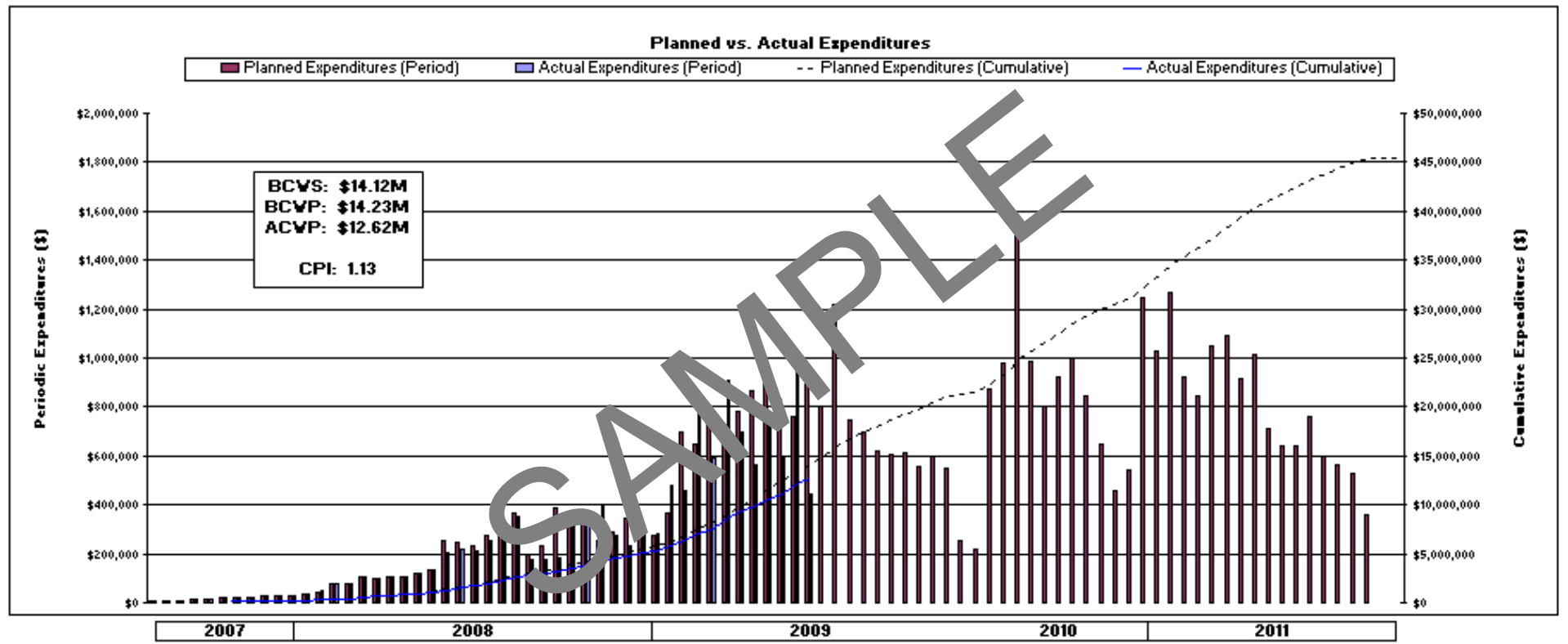


Project Title

Earned Value

Shared Services Group | Site Services | Organization Name

CNT-R-09XXX Sample EVM Project
Earned Value Management System

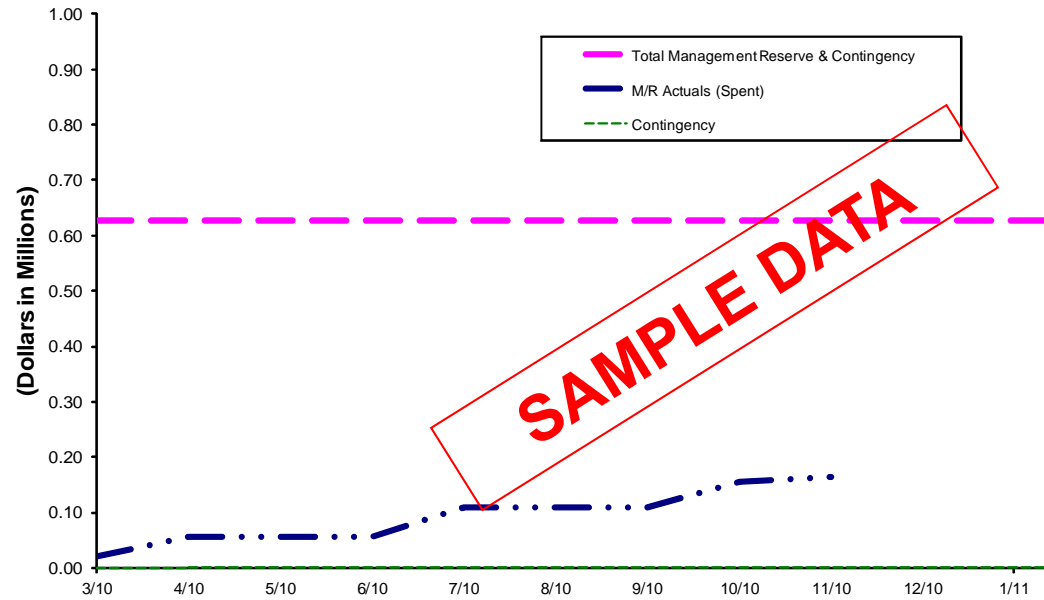


Project Title

Management Reserve / Contingency

Shared Services Group | Site Services | Organization Name

Sample Data
Management Reserve/Contingency - Expenditures 2010

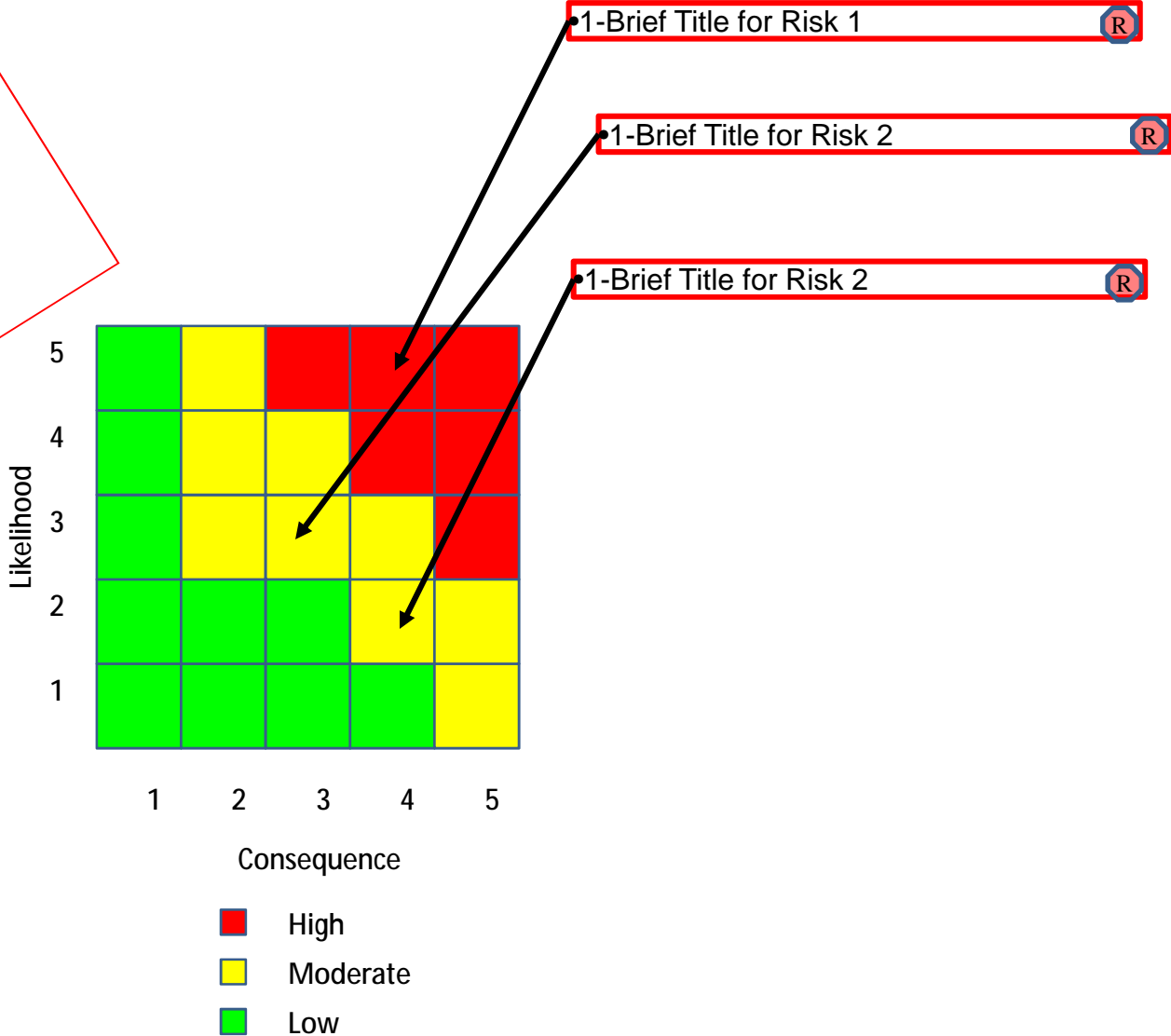


	3/10	4/10	5/10	6/10	7/10	8/10	9/10	10/10	11/10	12/10	1/11
Total Management Reserve & Contingency	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63
Management Reserve	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63	0.63
Contingency	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M/R Actuals (Spent)	0.02	0.06	0.06	0.06	0.11	0.11	0.11	0.16	0.17		
Contingency Actuals (Spent)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Total Actuals (Spent)	0.02	0.06	0.06	0.06	0.11	0.11	0.11	0.16	0.17		

Project Title - Risk Summary Grid Report

Risk ID IN(1)

EXAMPLE ONLY
For Major Project
Reporting use
BORIS



SSG Site Services - Risk Item Report

Title:

Owner:

Team Code:

Phone:

Resp Team:

Projects:

Backup:

Risk #: 1

Alt Risk #:

Update Date:

Description:

Likelihood Rationale:

Consequence Rationale:

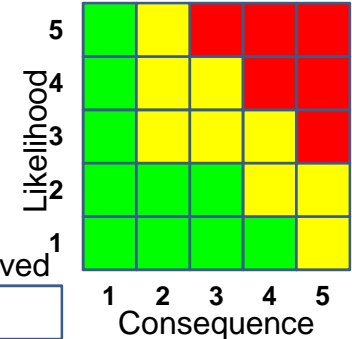
Mitigation Plan Status:



Visibility

- Program
 Site
 Team

Phase Archived



Type (based on source of risk) **High**
O - Original **Moderate**
X - Current **Low**

Plan:


Action/Event	Date			Success Criteria	Risk Level if Successful		Suc.	Comments
	Schd.	ECD	Act.		L	C		

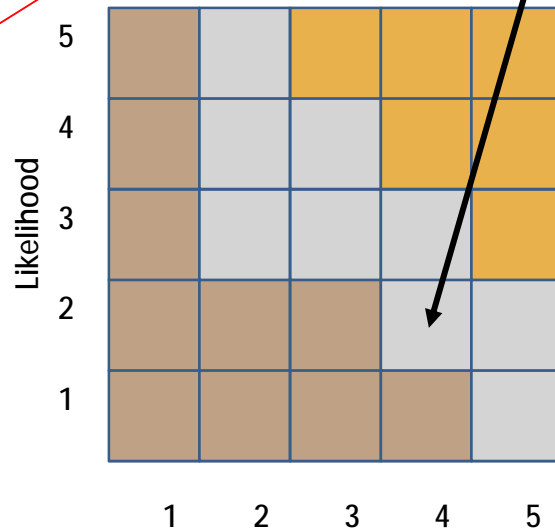
EXAMPLE ONLY
For Major Project
Reporting use
BORIS




Project Title - Opportunity Summary Grid Report

Opportunity ID IN(1)

EXAMPLE ONLY
For Major Project
Reporting use
BORIS

1-Brief Description of Opportunity 



-  High
-  Moderate
-  Low

Project Title

Help Needed

Shared Services Group | Site Services | Organization Name

Help Needed						
Description	Date Identified	Originator	Help Needed	From Whom	ECD	Status

Project Title

Backup Information / Photos

Shared Services Group | Site Services | Organization Name



Standard Deck Guidance and Definitions

These slides should be hidden for presentations.

Shared Services Group | Site Services | Organization Name

- § **Budget:** *This value should be at Project Manager level only.* This is the overall budget (“umbrella”) of a Major Project consisting of multiple projects. This value is set by Planning and appears in the current Business Plan.
- § **Authorized:** This value is a distribution made by the Planner and or PM to each PA for a given project based on a ROM or Scope. The Scope of Work Form should match this value. If additional funding is required, the PA should inform the Planner and PM.
- § **Committed:** A financial obligation or expected expenditure for The Boeing Company either contractually to a vendor (e.g. CSR, PR) or through the in-house process (e.g. release of Design Scope, CWA, BOM, FWO calculated as incurred costs using the published estimating rate times the estimated hours). This value is included in the Scope / Authorized Value.
- § **Anticipated Commitments:** Releases per above examples that are expected to be committed at a later date. This value is included in the Scope / Authorized Value. Anticipated Commitments includes pending project changes, Risk / Issue / Opportunity Impacts and project contingency balances
- § **MEAC:** “Management Estimate At Completion” The sum of Committed + Anticipated Commitments + Management Reserve.
- § **Program Balance:** Budget – MEAC = Program Balance
- § **Management in Reserve:** Budget without any specific scope attached to it, reserved to fund changes in the program baseline. MIR funds will be approved as authorized in section 2.8.
- § **Variance at Completion:** Program Balance – Management Reserve = Variance at Completion
- § **Actuals:** Costs incurred from Labor (In-House) or Non-Labor (materials or vendor support paid for by Payment Services). These costs are obtained through Farrell Database in detail (by person name or vendor name). Total dollars also appear in the Work Management System. Both sources of information split Labor from Non-Labor by Project Number.
- § **Funds Declared Available:** Part or all of the VAC. If the MEAC is certain and Actuals are accounted for, the PA may elect to return funding to the PM for re-distribution to other PA’s Projects within the total Major Project or the PM may choose to “give back” to D. Phillips.

Standard Deck Guidance and Definitions

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Shared Services Group | Site Services | Organization Name

Ø **MP Definition - SSG Site Services Major Projects** *typically* start at \$4,000,000 but also factor criticality, risk and complexity demands within the project.

§ Slide 1 - Cover page

§ Slide 2 – Project Description/Scope Statement:

- Provide a brief description of the project scope.
 - Supplement with illustrations/photos if available

§ Slide 3 – Photographs

- § Please include up to four photographs of your project.
- § Additional photographs may be included in the back of your deck and linked from this page.
- § Be sure to compact your photos to save on server space

Standard Deck Guidance and Definitions

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Shared Services Group | Site Services | Organization Name

§ Slide 4 – Executive Summary:

Comments: Provide any pertinent information regarding project performance relative to project scoring.

Cost Summary: Identify Capital and Expense portions of the Total Project Budget and the totals Spent to Date.

Time Line Milestones: Provide “birds on a wire”, a high level look of what’s important to the leadership team. Consider only high-level, major project milestones.

Contract Type: Identify the primary contract type (Cost Plus, Fixed Fee, etc.) of the project.

Project Manager: Identify who you are.

Last Update: Date when updates have been completed

Current Project Stoplight: Edit each box per Overall (include all phases) Current Project Status

Scope, CPI, SPI: See SSG Interface tool (you’ll need to copy the link below) for criteria and formulas and apply the appropriate fill color.

[\\fil-nw03-04\fac_eng_svcs\Construction_Management\BPR-Summary_Performance\2011\Major Projects Input Tool.xls](#)

Overall: Overall is based on colors provided in scope, CPI, and SPI boxes

YE: The year end box is your best estimate as to what the project status will be at year end.

PC: Project status when the project is complete.

Standard Deck Guidance and Definitions

These slides should be hidden for presentations.

Shared Services Group | Site Services | Organization Name

- **Slide 5 – Major Accomplishments:**

- Accomplishments
 - Describe accomplishments since last report
- Look Ahead
 - Describe activities to be accomplished before the next report and/or other near term activities/milestones.

- § **Slide 6 – Performance Summary:**

- This chart allows for project performance reporting in terms of statement of work, cost, and schedule for activities in the work breakdown structure. The performance data is then rolled up for an overall project performance score. Comments need to address Red or Yellow performance.

- **Slide 7 – Baseline Schedule Summary:**

- Schedule status for activities in the work breakdown structure. The schedule performance data is then rolled up for an overall project schedule performance score. Activities not yet started should be “grayed-out”. Forecast column is the PM’s estimate of the WBS element status at Year End (YE) and Project Complete (PC). Comments need to address Red or Yellow performance.

Standard Deck Guidance and Definitions

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Shared Services Group | Site Services | Organization Name

§ Slide 8 – Internal Resource/Vendor Performance (Optional Slide)

- Project performance reporting in terms of the quality of the cost, schedule, and quality data / deliverable provided by our internal resources and suppliers.
- Slide 9 – Financial Summary:
 - Financial Summary term definitions are shown on slide 28

§ Slide 10&11 – Earned Value

§ Show Earned Value data graphically including: Planned Value (PV), Actual Cost (AC), Earned Value (EV), Cost Performance Index (CPI), Schedule Performance Index (SPI) and Baseline Budget/Total Authorized Funding.

§ Slide 12 – Contingency:

§ This chart graphically shows the project plan for contingency expenditure and actual contingency expenditures.

Standard Deck Guidance and Definitions

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Shared Services Group | Site Services | Organization Name

§ Slide 13 – Change Management:

§ Document all in work which affect project baseline. Show approved changes for one monthly reporting cycle.

§ Slide 14 – Risk Summary Grid Report:

§ Example: Risk “Cube” as produced by BORIS.

§ BORIS URL: <https://boris.web.boeing.com/boris/default.aspx>

§ Slide 15 – Risk Item Report:

• Example: Blank Risk Mitigation Plan as produced by BORIS.

§ Slide 16 – Opportunity Summary Grid Report:

• Example: Opportunity “Cube” as produced by BORIS. [Slide 17 – Opportunity Item Report:](#)

• Example: Opportunity Response Plan as produced by BORIS.

§ Slide 18 – Issues:

• Enter issues that have occurred. Note, Risks may become issues.

• If none, enter “NONE AT THIS TIME”.

§ Slide 19 – Help Needed:

• Enter Help Needed, if any.

• To be used when requesting help from parties outside of project team.

• If none, enter “NONE AT THIS TIME”.

Definition Sheet - Cash Flow Chart

Shared Services Group | Site Services | Organization Name

- § **Plan Line** – Information entered into this line should represent the expenditures planned and represented in the original LRBP submittal as the project was approved. Does not reflect any changes to expenditures in subsequent LRBP submittals
- § **Baseline** – Reflect the current Project Baseline as documented. Does not include Management Reserve but does include all Project contingency.
- § **EAC** – Reflects Project Managers current estimate at completion
- § **Projected Billable** – Represents the value of the work in place. Includes the value of work received but not yet paid including pending invoices and retention
- § **Actual(s)** – represents the actual value of the total project cost as contained or booked with in the financial system