



Client Snapshot  
Department of the Treasury  
Internal Revenue Service (IRS):  
Tax Exempt/Government Entities

## Chevo Integrates Project Management and CPIC Reporting

Chevo instituted an integrated Project Management and Capital Planning and Investment Control (CPIC) reporting baseline for the IRS Tax Exempt Government Entities (TE/GE) business organization.

### BUSINESS CHALLENGES

To demonstrate effective project management practices, TE/GE Project Managers (PMs) were required to provide cost, schedule, and performance data to IRS oversight bodies. Each oversight body, however, had its own reporting timeframes and variance thresholds. Compliance with the reporting requirements necessitated projects to maintain multiple reports and baselines. This resulted in duplicative data entry, inconsistent reporting, and generation of variance reports to account for these inconsistencies. PMs were overwhelmed by the reporting and the effort necessary to continually justify their projects. Chevo analyzed the reporting requirements and found the following issues.

**Multiple Reporting Requirements** – Multiple levels of IT Governance, Project Management Office (PMO), CPIC, and Senate oversight bodies mandated frequent and ad-hoc reporting and data calls, often within short timeframes. Each request varied, but much of the core information relied upon the same project/investment information.

**Multiple Reports and Baselines were Maintained** – To answer these reporting requirements, the client had developed exclusive financial and scheduling models, for each data call, to retain supporting information. Each model was updated independently, following a different schedule, and prone to data entry errors.

**No Definitive Source for Data** – With multiple baselines, PMs unwittingly supplied conflicting reports for the same performance criteria. Most conflicts related to different reporting thresholds or variant threshold definitions for cost and schedule variances (e.g., Treasury established corrective action reports (CAP) for projects with a +/- 10% variance while the Senate Finance Committee required CAPs for any with a +/- 25% variance). With multiple baselines it was difficult to reconcile differences in data and/or the project's existence on one watchlist and not another.



### INDUSTRY:

- Federal Civilian
- Taxation Management

### SERVICES DELIVERED:

- Program/Project Management
  - Implementation & Operation
  - Scope & Requirements Management
  - Financial & Budget Management
  - Business Cases/E300s
  - Cost-Benefit Analysis
  - Risk Management
- Strategic Management
  - Agency & IT Strategic Planning
  - Organizational Change Management
  - Business Process Optimization
  - Strategy Implementation
- Portfolio Management
  - CPIC
  - Portfolio Assessment and Prioritization
  - IT Governance
  - Performance Integration
  - Investment Review Boards

## CHEVO SOLUTION

A single integrated repository and baseline was instituted to capture monthly cost, schedule, and performance inputs for each project. **Chevo** developed unique reports or outputs from this single repository to address the requirements of each oversight body. Each report indicated the variance thresholds and provided explanations for variances. PMs recorded key monthly project statistics, once, and utilized this data to provide information to multiple constituencies.

### Highlights of Chevo's Solution:

- **Utilized a Single Repository** – Designed a solution to leverage one instance of the source data to provide all oversight reporting.
- **Created Standardized Reports** – Provided a mechanism to generate standard reports while fulfilling unique data calls.
- **Designed Flexibility for Changing and Ad-Hoc Requests** – Created the ability to change reports quickly and generate ad-hoc reports.

## OUTCOME

The ability to enter monthly project data once reduced time spent collecting data and allowed the PM to accurately communicate project status to all oversight bodies timely. The PM used one set of data to monitor and control projects more efficiently and effectively.

- **Improved Data Quality and Consistency** – All reports utilized the same data, which provided consistency and traceability when reporting to the various oversight bodies, and increased data quality.
- **Reduced Time Required for Reporting** – Solution reduced the time spent collecting data, creating reports, and responding to questions about differences in performance metrics by 25% across all TE/GE PMs.
- **Increased Audit Defensibility** – Each project increased its audit defensibility as variances could be easily explained and defended through one set of books.
- **Improved TE/GE Portfolio Oversight** – Consistency in the data enabled TE/GE Portfolio Managers to quickly evaluate their portfolio and to monitor its performance. This allowed timely corrective actions, keeping the projects within schedule, budget, and performance baselines.

“The work products...were consistently of very high quality and completed within the boundaries of the work requests, including budget, schedule, and project requirements.”

Client Satisfaction Survey

## ABOUT CHEVO

Chevo Consulting, LLC (**Chevo**), is a Woman Owned Small Business (WOSB) that helps **change** and **evolve** federal agencies, their portfolios, and programs through practical implementation of unbiased advice. We are trusted advisors and practitioners in strategic, portfolio, program/project, and financial management.

Find out how **Chevo** and our consultants can help overcome your agency's specific challenges by contacting us at [Info@ChevoConsulting.com](mailto:Info@ChevoConsulting.com).

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