

PROJECT DELIVERY WORKING GROUP (PDWG)
FY2019 ANNUAL WORK PLAN (AWP)

MISSION AND SCOPE

The Energy Facility Contractors Group (EFCOG) Project Delivery Working Group (PDWG) is chartered to leverage the expertise and experience of U.S. Department of Energy contractors to address challenges and achieve improvements in project delivery across the DOE complex. The PDWG's purpose is to seek out, promote and share the best practices and processes for successful project delivery at DOE facilities. This will be achieved through contractor subject matter experts and professionals from across the DOE complex working together, and in partnership with DOE, to implement DOE initiatives that strengthen and advance the development, management and delivery of projects (and project-like activities) in support of DOE missions. The PDWG portfolio includes those broad-based, interrelated elements across the project lifecycle critical to successful project delivery. Areas of focus and collaboration include:

- Project Management
- Cost Estimating
- Scheduling
- Risk Management
- Acquisition Management
- Contract Management
- Project Peer Review Support
- Start-up, Testing and Commissioning
- Guide revisions

The Working Group will focus on practical and effective solutions to complex-wide challenges; promote open communication and sharing of lessons learned and best practices, and leverage inter-site and inter-contractor solutions to achieve enterprise-wide improvement while supporting cost-effective and efficient solutions. This will be achieved in a manner that maintains a priority on safety, compliance and cost-effectiveness.

The Project Management focus areas will be project management, construction management, risk management, cost estimating, scheduling and project peer review support. The Project Controls Subgroup will focus primarily on earned value compliance in support of PM-30 and EM-5.22. These efforts will be integrated and supported by task teams and other working groups as necessary to provide solutions to improving project delivery across the complex. The work plan activities will be accomplished through the collaboration of complex-wide SME's.

WHAT EFCOG DOES AND DOES NOT DO:

EFCOG Does: *Promote safe work practices, promote, coordinate, and facilitate performance improvement exchange among DOE contractors, establish and maintain effective networks for addressing key DOE complex-wide issues, sponsor working groups and workshops to exchange management and technical information, seek to reduce costs and improve efficiencies, establish liaisons with other organizations to minimize duplication of efforts, interface with DOE to ensure that EFCOG's mission remains in alignment with DOE objectives, recommend productivity enhancements*

EFCOG Does Not: *Engage in lobbying, duplicate efforts of other groups, exchange contractual, financial, or legal information, take independent positions on DOE policy, or require standardization of member positions*

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The EFCOG PDWG Planned Activities for FY 2019 (October 1, 2018 – September 30, 2019)

Activity(s)	Benefit(s)	Deliverable/Key Milestone(s)
1.0 Project Controls Subgroup		
1.1 Provide collaborative earned value compliance support to the Office of Project Management Oversight and Assessments (PM)/ (PM-30) and EM-5.22, as requested. Ongoing	The purpose of the specific activities contained in the FY2019 Work Plan is to continue the development and implementation of best practices guidance that enhance the integrity of contractor schedule and cost in support project deliveries.	1.1.1 Provide qualified resources to support PM-30 and EM-5.22 requests, as needed
1.2 Publish The EFCOG best practice on Earned Value Management Ongoing	Contractors establishing or maintaining a compliant earned value management system will be able to use the documents to guide development or maintenance of their earned value management systems	1.2.1 Publish the best practice on the EFCOG Project Delivery Working Group Webpage in FY2019.
1.3 Develop an EFCOG/DOE best practice on a compliant approach to Title III / Engineering during Construction New in FY2019	Published best practice will be available to contractors as a guide for Title III / Engineering during Construction	1.3.1 Publish the best practice on the EFCOG Project Delivery Working Group Webpage in FY2019.
1.4 Develop an EFCOG/DOE best practice for the appropriate usage of Contractor Management Reserve New in FY2019	Published best practice will be available to contractors as a guide for management reserve	1.4.1 Publish the best practice on the EFCOG Project Delivery Working Group Webpage in FY2019.
1.5 Provide support to DOE (PM-30) on Planning and Scheduling Amplification Guide New in FY2019	Provide scheduling guidance specifically as it is related to details and expectations at each gate in the Critical Decision process as outlined in DOE O 413.3	1.5.1 EFCOG to provide support to PM-30 as part of an Integrated Project Team (IPT) to produce a new guidance document to outline scheduling expectations compliant with DOE O 413.3
1.6 Develop an EFCOG/DOE best practice for the appropriate usage of	Published best practice will be available to contractors as a guide for SVT's	1.6.1 Publish the best practice on the EFCOG Project Delivery Working Group Webpage in FY2019.

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Schedule Visibility Tasks (SVT's)		
New in FY2019		
1.7 Support PM-30 in development of an EVMS Scorecard	Provides for a common point-of-reference to gauge the health of contractor EVMS	1.7.1 Support draft prototype of the scorecard consistent with the PM-30 ASU study schedule
New in FY2019		
1.8 Support PM-30 on approach to EV alternatives	Provides alternative to the typical approach and full rigor and discipline required for EVMS implementation while providing the same level of assurance in cost and performance of project scope	1.8.1 Discuss and define the deliverable at the PM-30 and Project Controls Subgroup/EVM Task Team Meeting in April 2019
New in FY2019		
1.9 Support PM-30 with Document/Guide updates	Updated documents reflect the latest positions/decisions based on collaborative effort by DOE and EFCOG	Support as required
New in FY2019		
2.0 Project Management		
2.1 Support DOE efforts in the development of DOE guides and revisions. Provide review comments, support comment disposition/resolution, and implementation.	Ensure that process / step / deliverable changes resulting from the revised documents are clearly stated and support consistent implementation by DOE contractors.	2.1.1 Provide comments to DOE HQ point of contact on proposed changes to applicable DOE guides
Ongoing - Retain in FY2019		
2.2 Continue to provide Project Peer review candidates based on DOE request	DOE receives Contractor resources to perform reviews, Contractors receive the educational benefit and perspective	2.2.1 Provide qualified resources for agency reviews as requested
Ongoing - Retain in FY2019		
2.3 Make final edits to 12 Step Estimating Tool.	Provide documented best practices in action to meeting the GAO 12-Step process in a tailorable format.	2.3.1 Upload revised 12-Step tool (Version 1.2) to EFCOG webpage
Ongoing		
2.4 Investigate and provide recommendations and	Under FAR-Based Contract rules, Management Reserve is not allowed to be documented in	2.5.1 Issue a report with recommendations and best practices and methodologies

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<p>best practices and methodologies for preparing FAR-Based proposals and definitizing upon award.</p>	<p>proposals. However, risks should be considered in the development of reasonable and foreseeable cost estimates. Typically, MR is carved out of the proposal price during definitization of the baseline. There are no guidelines or best practices as to how to consistently estimate the cost of foreseeable risk and subsequently populate MR, leading each contractor and/or DOE field element to satisfy this requirement in a different way. Identifying a methodology to do this would benefit contractors when preparing and DOE when evaluating these types of proposals.</p>	<p>for first preparing FAR-Based proposals and then definitizing upon award.</p>
<p>New in FY2019</p>		
<p>2.5 Review DOE Risk Management requirements/guidance and identify gaps where supplemental guidance would be of benefit. Where it is not provided elsewhere, identify the need to develop guidance/best practices and schedule their development as Risk Task Team initiatives. These supplemental guidance documents may, if deemed appropriate, be incorporated into future revisions to DOE guides</p>	<p>DOE Risk Management requirements/guidance documents do not always reach down to provide specific guidance at the implementation level. Identifying guidance gaps where supplemental guidance would be of benefit and providing the guidance benefits to both contractors and DOE. Contractors will be consistent and more effective in their execution of risk management and DOE will be able to select specific guidance for inclusion in future revisions of Risk Management guides.</p>	<p>2.6.1 Issue a listing of gaps where additional guidance can be of benefit 2.6.2 Update list to identify where guidance is available in other industry-wide documents and identify where guidance needs to be developed 2.9.3 Select from the list, those guidance documents that can be developed and issued in FY19 and complete their development, approval and issuance. 2.9.4 Upload the listing at the end of FY19 onto the EFCOG Risk Management task team document library for use and also use as a planning tool for FY20 Work Plan</p>
<p>New in FY2019</p>		
<p>3.0 Startup, Testing, and Commissioning</p>		
<p>3.0 Support DOE in creating the DOE versions of the Start-up, Testing, and Commissioning Guide.</p>	<p>Fostering interface and integration of contractors with DOE counterparts to capture collective experiences and lessons learned. Facilitate and</p>	<p>3.1.1 Support DOE in with the guide's REVCOM process</p>

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Ongoing	improve the transition from construction completion to operations.	
4.0 Acquisition		
4.1 Develop and issue the Acquisition Subgroup charter. New in FY2019	The subgroup charter will provide a clear direction, scope, and operating structure for the Acquisition Subgroup.	4.1.1 Initial subgroup charter.
4.2 Identify Best Practices and Lessons Learned in managing the project or contract Code of Record. New in FY2019	The project Code of Record can be managed in a variety of ways, but limiting changes to the Code of Record will generally significantly improve cost and schedule outcomes for projects and reduce administrative burdens. Methods to limit Code of Record changes can range from outright exclusion of discretionary changes after specified Critical Decision gates to tailored implementation of new requirements. By identifying multiple best practices suitable to different project environments and conditions, this will provide potential roadmaps to how current Departmental Guidance can be achieved.	This activity has two milestones: 4.2.1 Issuance of a best practice and lessons learned document evaluating concrete implementation strategies for managing COR changes. 4.2.2 Develop a flowchart on how requirement or code changes can be evaluated pre and post-award to minimize project churn and additional cost, with special consideration for assessing changes in requirements that provide minimal benefit or have limited applicability to the project they are applied to.
5.0 Administrative		
5.1 Expand PDWG "Rolodex"/list to include a consolidated list from EFCOG/SMEs New in FY2019	Utilizing the SMEs across the complex will support DOE efforts of <i>"Improving the Department's Management of Projects"</i> and support agency reciprocity	5.1.1 Implement the format developed for the enhanced SME contact list to capture EFCOG and ensure representation from NNSA and Office of Science Contractors 5.1.2 Establish a maintenance plan and platform (EFCOG Support Contractor) to assure the SME list is current 5.1.3 Place the consolidated "Rolodex" on the EFCOG main webpage

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<p>5.2 PDWG internal communications</p> <p>Ongoing</p>	<p>Information sharing, knowledge-transfer and consistency of purpose in EFCOG activities to best support the DOE complex. Support those efforts through a topic specific workshop developed in coordination with DOE (HQ and Field).</p>	<p>5.2.1 Hold meetings (typically monthly) via email, conference call or face-to-face meetings as necessary to maintain active engagement, SME networking and complete specific deliverables. Maintain and publish agenda and action item list</p> <p>5.2.2 Workshops and operational meetings twice per year. Maintain and publish agenda, action item list and presented materials</p> <p>5.2.3 Posting of meeting minutes, presented materials and notices to working (or task) group website and/or EFCOG website, as appropriate</p> <p>5.2.4 Update and post Master PDWG contact list</p> <p>5.2.5 Hold a leadership meeting for strategic planning prior to the EFCOG Annual meeting</p>
<p>5.3 PDWG client communications</p> <p>Ongoing</p>	<p>Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex.</p>	<p>5.3.1 Communications with PDWG DOE Liaison Mike Peek and DOE personnel and Task Sponsors as needed</p> <p>5.3.2 Reporting to DOE on EFCOG deliverables and best practices</p> <p>5.3.3 Develop a communication zipper chart between EFCOG and DOE</p> <p>5.3.4 Update and improve presentation of and access to information on EFCOG website for ease of use</p>

Additional Information:

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1. Other Working Group Activities
 - a. Weekly and monthly conference calls
 - b. Face to face meetings
 - c. Other Working Group and lower tier activities not covered in the table above
2. Reporting and Communications
 - a. Plans for meeting minutes
 - b. Plans for any subgroups and/or task teams that may be ending/completing during FY2019
 - c. Plans for posting information on the Working Group's website including best practices and white papers

Management and coordination of PDWG activities. This element supports leadership and coordination of working group activities, including interface with the DOE Liaison and task sponsors. Routine (typically monthly) conference calls are used to coordinate operational tasks and focus areas, as well as to disseminate information across the working group membership. Remote methods will be used as much as possible for task-specific work activities. Face-to-face meetings will be conducted as determined to be cost-effective to support development of specific deliverables. Focused meetings may be conducted in conjunction with other conferences/meetings in an effort to minimize costs to the government. It is anticipated that new tasks will be added and ad hoc tasks may be identified as emerging issues are recommended by the working group or requested by DOE and coordinated with the DOE Liaison. It is anticipated that two working group meetings will be held in FY2019. EFCOG workshops, PDWG working meetings, and working/planning sessions may coincide with the EFCOG Annual Meetings, although it is anticipated that a PDWG face to face meeting will be held separately prior to the end of FY19.