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

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 PDWG is comprised of the Project Management Subgroup (PMSG) consisting of two primary components: the Risk Management and Project Controls task teams.

The PMSG focus areas will be project management, construction management, project controls, risk management, cost estimating, and project peer review support. Project Controls 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 PDWG has three additional task teams that can be activated when required: *Engineering, Quality, and Acquisitions*.

The PDWG and its subgroups 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, 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 ex-change 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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Activity(s)	Driver/Benefit(s)	Deliverable/Key Milestone(s)/Status	Owner	Est. Comp. Date
1.0 Project Management Subgroup – T. Heath/A. Steiman				
1. Support DOE efforts in the development of DOE guides and revisions. Provide review comments, support comment disposition/resolution, and implementation.	Driver: DOE Request Benefit: Ensure that process / step / deliverable changes resulting from the revised documents are clearly stated and support consistent implementation by DOE contractors.	Provide comments to DOE HQ point of contact on proposed changes to applicable DOE guides	T. Heath	As needed
1A Support DOE efforts in the revision of DOE 413.3. Provide review comments, support comment consolidation, disposition, resolution, and implementation.	Driver: DOE Request Benefit: Ensure that process / step / deliverable changes resulting from the revised documents are clearly stated and support consistent implementation by DOE contractors.	Provide comments to DOE HQ point of contact on proposed changes to applicable DOE guides	T. Heath	Per DOE's schedule
2. Continue to provide Project Peer review candidates based on DOE request	Driver: DOE Request Benefit: DOE receives Contractor resources to perform reviews, Contractors receive the educational benefit and perspective	Provide qualified resources for agency reviews as requested	T. Heath	As needed
3. Understand DOE project path forward for Net Zero-Carbon free project execution.	Driver: DOE Request Benefit: Timing and implementation of this requirement may add cost and schedule to projects in preliminary planning stages. Need to understand when to impose these requirements and any exemption process.	Provide feedback and support to follow-on project planning documentation or changes to DOE Orders that include Net Zero actions	M. Schlender to identify name	TBD
4. For commercialized project approach – what does the specification for a conceptual design and performance based functional	Driver: Allows a tailored approach to implementation. Benefit: Leverage the lessons learned from NNSA Pilot and determine how to	Develop a white-paper that includes lessons learned and process/approaches to be considered within	D. Cato	9/30/24 Still chasing This will be captured in the 413.3C update

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requirements and demonstration of the PMO need to look like. (NREL example best practice and checklist – how to manual)?? (Diane Cato – Joan)	execute “commercial” like projects at EM sites.	the EM Framework.		
5. Understand and document lessons learned from NNSA pilot projects using commercial practices for non-nuclear/non-hazardous facilities builds	Driver: Provides a more cost effective alternative. Benefit:	Support the development of commercial like project exemptions Contact PM-30 regarding IPT Understand the why behind wanting an appendix	T. Heath	9/30/24 Draft list of exemptions developed, need to close with PM-30 regarding appendix to 413.3B. This will be captured in the 413.3C update
6. Focus on recruitment of PMs to the PDWG	Driver: Need to broaden the engagement of PMs in our group. Benefit: Continuity of skill base and experience		T. Heath A. Basche PDWG Board	Ongoing
2.0 Risk Management – J. Wargo				
1. Engage with EFCOG Training Working Group and DOE NTC to advance Bias Management training from module development stage to completed pilot training at a DOE site.	Driver: EFCOG Collaboration to deploy previously completed Bias Study Benefit: By promoting (through training) an awareness of the kinds of bias that influence our judgement, the following benefits will be realized: • Greater objectivity in decision-making • More accurate cost and schedule estimates,	Issue a guide to specific bias reduction techniques that can be applied to improve judgement effectiveness through Program of process enhancements. Pilot the Bias Awareness Training Package at selected sites and finalize the Bias Awareness training based on	J. Wargo	9/30/24

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	<ul style="list-style-type: none"> • Increased creativity in the Alternatives Analysis and Value Engineering processes • Heightened sensitivity and awareness to avoid bias in the everyday activities of Project Managers and a broad range of multi-disciplined project support and execution staff will increase efficiency 	feedback. The goal is to deploy the training through the Complex.		
2. Continue to work with the ACMSG and DOE prior to and after the initial ESCM awards to develop and deploy methodologies for MR and risk transparency on FAR-based contracts that can be utilized by both contractor and DOE during IDIQ task negotiation, authorization and definitization.	<p>Driver: Enhancing MR transparency in current ESCM</p> <p>Benefit: There currently exists conflicting guidance for MR quantification and transparency as defined within DOE Acquisition Guide and DOE O 413.3B.</p> <p>By developing and deploying methodologies for MR and risk transparency during task proposal, authorization and definitization, these processes will be streamlined, more efficient and effective.</p>	White Paper issued in FY2022. Follow-on work to: <ul style="list-style-type: none"> • Further advance this initiative within DOE-HQ by establishing relationships with DOE advocates /sponsors • Maintain an awareness of this issue within DOE and EFCOG • Develop methodologies of implementing MR and risk transparency for ESCM application 	J.R. Thomas	9/30/24 This will be captured in the 413.3C update
3. Integrate best practices guidance for pre-CD-2/3A risk management activities into FY24 DOE O 413.3B update	<p>Driver: DOE/EFCOG Collaboration</p> <p>Benefit: Currently no detailed guidance is provided as to the role of Risk Management and the level of detail and</p>	Interface with DOE team leading DOE O 413.3B update to ensure Pre-CD-2/3A best practices are effectively integrated into the	J. Wargo	413.3B O Update This will be captured in the 413.3C update

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	<p>composition of pre-CD-2/3A Risk Management Deliverables. For example, current CD-1 requirements are limited to development of a Risk Management Plan and Risk Register only. Integrating current CD-1 risk management best practices directly into the Order update will ensure more consistency and clarity into pre-baseline risk management expectations at the site level across the Complex.</p>	<p>FY24 Order update.)</p>		
<p>4. Integrate best practices guidance for utilizing Joint Confidence Level (JCL) analysis results into FY24 DOE O 413.3B update</p>	<p>Driver: DOE/EFCOG Collaboration Benefit: Currently DOE-G-413.3-7A “Risk Management Guide” does not provide guidance on integrated cost schedule risk analysis (ICSRA), and how to derive and utilize Joint Confidence level (JCL) results and outputs. As part of the FY24 Order update, incorporating more detailed guidance on how to effectively interpret a JCL scatterplot curve for informing a risk-adjusted estimate</p>	<p>Interface with DOE team leading DOE O 413.3B update to ensure JCL best practices are effectively integrated into the FY24 Order update.</p>	<p>J. Wargo</p>	<p>413.3B O Update This will be captured in the 413.3C update</p>

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	<p>would help clarify any site-level risk management activities where JCL analysis is required.</p>			
<p>5. Defining best practices for risk management integration with estimates at complete (EAC), including comprehensive annual EAC development.</p>	<p>Driver: Internally identified process enhancement Benefit: Currently DOE-G-413.3-7A “Risk Management Guide” does not provide EAC integration with EIA-748, Earned Value Management System (EVMS) requirements. On June 1, 2022 DOE issued an update to the Compliance Assessment Governance (CAG) 2.0, detailing maturity levels associated with EAC ranges informed by the risk register and SRA. Providing additional contractor guidance will allow for a holistic approach when evaluating EAC, including comprehensive annual project EACs. In addition, alignment of updated risk registers and SRAs will provide indicators for Total Project Cost (TPC) and CD-4 completion dates.</p>	<p>Develop Risk Management and EAC Integration White Paper - Identify and develop holistic approach based on industry best practices</p>	<p>J.R. Thomas</p>	<p>9/30/24</p>

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3.0 Project Controls – A. Gilstrap				
1. Facilitate implementation of the PM Maturity and Environment Total Risk Rating (METRR) tool	Driver: DOE Request Benefit: Support DOE workshop for completed projects analysis using METRR	Provide qualified site projects for evaluation and SMEs		12/31/23
2. Provide collaborative earned value compliance support to the Office of Project Management Oversight and Assessments (PM)/ (PM-30) and EM-5.22, as requested.	Driver: Support M & Os by DOE the M & O perspective and experience with implementing EVMS Benefit: Continue the development and implementation of best practices guidance that enhance the integrity of contractor schedule cost, and performance in support of project deliveries.	Provide qualified resources to support PM-30 and EM-5.22 requests, as needed	L. Cazalet	09/30/24 Ongoing
3. Conduct Integrated Master Schedule (IMS) – Peer Reviews and provide Recommendations for IMS solutions to include: <ul style="list-style-type: none"> Rolling Wave Planning IMS Reasonableness IMS Quality 	Driver: Need high Quality IMS to support EVMS Certification Benefit: Provides an independent, compliance review by an EFCOG team of schedulers and EVMS compliance subject Matter Experts What is the definition, what is the spec, what is the expectation? Define a Best Practice? How does it impact or align to the 413.3 Schedule Guide? - (Derek Lehman and Janay Bloch)	Submittal of a review team report that reflects observations and recommendations	D Lehman J. Bloch	09/30/24 Team has been formed and has had a couple of initial meetings

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4. Project- Subproject path forward (white paper from PC team) – Understand the PARS driver	<p>Driver: Need the ability to summarize projects at a program level and have the ability to roll up subprojects to a project or program level</p> <p>Benefit: New DID for flat files, IPMR, CFSR in JSON vice CSV or MDB; Improve DIQ (need clarity on how New DID, and Flat Files are required on contracts and the purpose of the level of detail in PARS?) What do you need in PARS that you are not getting now? Involvement of PM-30 with upfront RFP development?</p>		Roy Wright	09/30/24 Final Draft done, waiting on comments
5. EVMS Metrics Provide CCB input to simplify / Identify Primary & secondary / Remove duplication / New if warranted	<p>Driver: Need to ensure the specifications for the metrics are able to be met and the tests work in Empower</p> <p>Benefit: The M & Os understand the specifications and are able to generate the required results in the metrics</p>		A. Gilstrap D. Marbourg,	Ongoing
6. EVMS Compliance / Surveillance Reviews	<p>Driver: EVMS Compliance</p> <p>Benefit: Cross collaboration of contractors and DOE enhancing the EVMS environment</p>		D. Marbourg	Ongoing
7. Contribute to the Development of a PC Award Program	<p>Driver: DOE Request</p> <p>Benefit: Incentive for implementing best practices for EVMS implementation</p>	Draft Plan	A. Gilstrap	9/30/24

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8. Indirect Budget/Cost Management and the Schedule	Driver: DOE PM-30/EFCOG Problem Statement Benefit: Common understanding of the problem and the Optimized Solutions	Optimized Compliance with EIA-748 and CAS	A. Gilstrap	9/30/24
3.0 Administrative				
1. PDWG internal communications	Driver: EFCOG Collaboration Benefit: 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).	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	Team	Ongoing
2. PDWG client communications	Driver: DOE/EFCOG Collaboration Benefit: Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex.	Communications with PDWG DOE Liaison, personnel and Task Sponsors as needed Reporting to DOE on EFCOG deliverables and best practices	Team	Ongoing
3. Publish a Monthly Newsletter	Driver: DOE/EFCOG Collaboration Benefit: The newsletter is intended to communicate and inform our members, customers, and sponsors of our ongoing activities, upcoming events, and interesting project information.	Distribute Monthly Newsletter to the PDWG and post to the EFCOG PDWG Webpage. Note: Monthly newsletters have been published and are posted	C. Hewitt	Monthly

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Additional Information:

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 FY2024
 - 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 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 FY2024. EFCOG workshops, PDWG working meetings, and working/planning sessions may coincide with the EFCOG Annual Meetings, although it is anticipated that PDWG face to face meetings may/will be held separately.