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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
- 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. There are two primary components to the PDWG: The Project Management Subgroup (PMSG) and the Acquisitions and Contracts Subgroup (ACSG).

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 ACSG objective is supporting DOE customers and contractors in key areas of contracts and acquisition management. The intent of the subgroup is to provide a focal point for contracts and acquisition related tasks identified in the PDWG fiscal year work plan as well as providing continued support for efforts undertaken recently in areas like regulatory reform

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

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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*

Activity(s)	Benefit(s)	Deliverable/Key Milestone(s)/Status
1.0 Project Management Subgroup		
1.0.1 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.	1.0.1.1 Provide comments to DOE HQ point of contact on proposed changes to applicable DOE guides
1.0.2 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	1.0.2.1 Provide qualified resources for agency reviews as requested
1.0.3 Review, identify, and recommend incorporation of value-added Construction Industry Institute (CII) Front-end Planning Process/ "Pre-Conceptual Planning" "Best Practice's"	Positions DOE Projects for successful initiation and execution	1.0.3.1 Provide a list of recommended CII best practices to incorporate into the front-end planning process
1.0.4 Incorporate ASU EVMS Study Results into the Compliance Assessment Guide (CAG) –	Aligns the CAG to the ASU Maturity Attributes and Environmental Factors providing a comprehensive review basis	1.0.4.1 CAG rewrite to align to the ASU Study Results Maturity Attributes Environmental Factors
1.0.5 NEW - Government Accountability Office (GAO) High-Risk Report (Department of Energy) DOE Contract and Project Management (March 2021 Biennial High-Risk Report)	Emphasizes the DOE/Contractor "High-Risk" vulnerabilities requiring resolution to mitigate recurrence	1.0.5.1 Review and Recommend Solutions for areas of decline and Support DOE development and implementation of actions to address

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1.1 Project Controls		
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.	The purpose of the specific activities contained in the FY2022 Work Plan is to continue the development and implementation of best practices guidance that enhance the integrity of contractor schedule cost, and performance in support project deliveries.	1.1.1 Provide qualified resources to support PM-30 and EM-5.22 requests, as needed
1.1.2 Support PM-30 in development of an EVMS Scorecard	Provides for a common point-of-reference to gauge the health and maturity of contractor EVMS	1.1.2.1 Support the PM-30 ASU study initiative and schedule
1.1.3 Support PM-30 with Document/Guide updates	Updated documents reflect the latest positions/decisions based on collaborative effort by DOE and EFCOG	1.1.3.1 Support as required
1.1.4 Define 413 Tailoring Strategy	Provides a tailored approach to 413	1.1.4.1 Document and gain a consensus problem statement 1.1.4.2 Evaluate the problem statement and determine if tailoring of 413 is practical and achievable 1.1.4.3 Identify practical and achievable strategies for tailoring options and to PM-30 for their evaluation 1.1.4.4 Develop an EFCOG PDWG white paper that highlights the tailoring criteria currently in 413 including examples of how has been applied. Note: Additional scoping required to ensure alignment of expected outcomes.
1.1.5 Support PM-30 with development of best practices for implementing EVM tools to feed DOE/NNSA reports	<ul style="list-style-type: none"> • Identify Guidelines that support Enterprise using Cost & Schedule tools • Develop a best practice(s) specifically emphasizing the key elements of data quality and data integration 	1.1.5. 1 Develop a guide that will support current and new DOE contractors and/or new sites with setting up new or existing tools that pull in legacy data. Best practices for setting up a new project/program, ensuring data quality and integration,

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	<ul style="list-style-type: none"> • Provide cost and schedule data formats to properly, routinely, and correctly populate the DOE-PM-30 flat files required for data analysis • Include a best practice defining the benefits of providing “Resource Loaded Schedules” to both DOE and the contractor • New Site, New Contractor, New Tools-Dealing with Legacy Data • Set up to do Self-Governance • Streamline Reporting • Good Configuration Control • Tailorable • Recommendations for Project/Program Setup • Contractor Transition • Reporting to DOE • Establish a framework to capture lessons learned specific to these objectives. 	<p>streamlining reporting, establishing, and maintaining good configuration control and a lesson learned program.</p> <p>Note: Progress is being made but this activity won't be completed until FY22. We will continue working directly with PM-30 to align data requirements and requests. The DOE data metrics will also be revised based on ASU study results.</p>
<p>1.1.6 - Conduct Integrated Master Schedule (IMS) – Peer Reviews and provide Recommendations for IMS solutions to include:</p> <ul style="list-style-type: none"> • Rolling Wave Planning • IMS Reasonableness • IMS Quality 	<p>Provides an independent, compliance review by an EFCOG team of schedulers and EVMS compliance subject Matter Experts</p>	<p>1.1.6.1 Submittal of a review team report that reflects observations and recommendations</p>
1.2. Risk Management		
<p>1.2.1 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</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>	<p>1.2.1.1 Preliminary report issued. Follow-on work to:</p> <ul style="list-style-type: none"> • Further advance this initiative within DOE-HQ by establishing relationships with DOE advocates /sponsors

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contractor and DOE during IDIQ task negotiation, authorization and definitization.		<ul style="list-style-type: none"> • Maintain an awareness of this issue within DOE and EFCOG • Develop methodologies of implementing MR and risk transparency for ESCM application
1.2.2 Follow through in maturing the previous EFCOG Bias Management work by developing training material in a collaborative effort with the EFCOG training Group and piloting the training material and bias reduction techniques.	<p>By promoting (through training) an awareness of the kinds of bias that influence our judgement, the following benefits will be realized:</p> <ul style="list-style-type: none"> • Greater objectivity in decision-making • More accurate cost and schedule estimates, • 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 	<p>1.2.2.1 Issue a guide to specific bias reduction techniques that can be applied to improve judgement effectiveness through Program of process enhancements - Ongoing</p> <p>1.2.2.2 Pilot the Bias Awareness Training Package at selected sites and finalize the Bias Awareness training based on feedback. The goal is to deploy the training through the Complex. (FY2022) - Ongoing</p>
1.2.3 - Follow through in maturing the previous EFCOG Bias Management work by piloting training material previously developed, at one or more sites	<p>By promoting (through training) an awareness of the kinds of bias that influence our judgement, the following benefits will be realized:</p> <ul style="list-style-type: none"> • Greater objectivity in decision-making • More accurate cost and schedule estimates, • 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 	<p>1.2.3.1 After previously issuing a pilot Bias Awareness Training Package, which includes biases and other human behavioral factors awareness training in project management planning, forecast, and risk. This pilot will be tested at selected sites in, then finalized with the goal of being eventually deployed throughout the complex</p>
1.2.4 - Develop a best practice which outlines the role of Risk	Currently no detailed guidance is provided as to the role of Risk Management and the level of	1.2.4.1 Review and evaluate Risk Management Methodologies, the role Risk

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Management in pre-CD-2/3A activities and provides consistent guidance	detail and composition of pre-pre-CD 2/3A Risk Management Deliverables. By identifying a streamlined approach, sites will be consistent in these pre-pre-CD 2/3A deliverables and processes and remove inefficiencies from the process, thus saving costs.	Management plays and the deliverables produced prior to the CD-2/3A effort. Develop and recommend best practices in a white paper
1.2.5 - Develop a paper on a Joint Confidence Level (JCL)	Establishes what is required to develop a Joint Cost and Schedule Confidence Level, the required materials from a project as well as the tools and procedures required to its applicability to projects of varying complexity and cost across the Department in general and the EM Program in particular.	1.2.5.1 Provide recommendations for updating DOE G 413.3B-7B (in comparison to the existing methods reflected in the literature outside of the Department)
1.3 Project Engineering Support		
No Activities Currently Identified		
1.4 Project Quality Assurance		
No Activities Currently Identified		
2.0 Acquisition and Contracts Subgroup		
2.1 Identify best practices in partnering processes that support efficient contract administration.	Supports efficient contract administration; may provide significant benefits to sites or projects rolling out new contracting models (such as End State IDIQ contracting for DOE-EM).	<p>2.1.1 Best Practice to be published on the EFCOG Webpage and directly distributed to the PDWG members. This activity will include evaluation of partnering on multiple levels, including stakeholders, the Department of Energy, prime contractor, and subcontractors and lower tiers.</p> <p>Note: In-Process - On track to complete by the end of the fiscal year. Information has been gathered supporting issuance of the deliverable, which will undergo peer review within the subgroup prior to issuance.</p>

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<p>2.2 Conduct an industry information share on subcontract oversight and compliance and areas of high perceived risk; share strategies for mitigating or eliminating risk.</p>	<p>Sharing potential subcontract compliance risk information and risk mitigation strategies will reduce the occurrence of issues, improve project, and supply chain performance, and promote earlier identification of issues.</p>	<p>2.2.1 Previously, an industry survey was distributed to identify potential areas of value for focus group discussions or solicitation of best practices. In FY22, publish the subcontract compliance and risk mitigation strategies on the EFCOG Webpage and directly distribute to the PDWG members.</p> <p>Note: In-Process - Following the broad impacts of the COVID-19 pandemic on supply chains and the issuance of major prime contracts within DOE-EM, the subcontracting risk profile has evolved. The ACMSG is evaluating restructuring how we accomplish this objective to maximize benefit and effectiveness.</p>
<p>2.3 Identify practices in contract closeouts that may reduce the time, complexity, and cost of prime contract closeout.</p>	<p>Initiating contract closeout as early as possible in the contract lifecycle increases clarity, significantly reduces the effects of “tribal knowledge” loss, and creates real-time closure of subcontracts, charge codes, and collection of documentation supporting accomplishment of contract deliverables.</p>	<p>2.3.1 Best Practice to be published on the EFCOG Webpage and directly distributed to the PDWG members.</p> <p>Note: In-Process - Currently working. Produce and key observations are being compiled and will be presented to the subgroup in July and finalized.</p>
<p>3.0 Administrative</p>		
<p>3.1 PDWG internal communications</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>3.1.1 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.</p>

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		<p>Maintain and publish agenda and action item list</p> <p>3.1.2 Posting of meeting minutes, presented materials and notices to working (or task) group website and/or EFCOG website, as appropriate</p> <p>3.1.2 Hold a leadership meeting for strategic planning prior to the EFCOG Annual meeting</p> <p>Note: Regular meetings at the subgroup level are taking place. Information being shared to website for ease of access.</p>
3.2 PDWG client communications	Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex.	<p>3.2.1 Communications with PDWG DOE Liaison Mike Peek and DOE personnel and Task Sponsors as needed</p> <p>3.2.2 Reporting to DOE on EFCOG deliverables and best practices</p> <p>Note: Monthly telecons are scheduled and well attended to ensure alignment with DOE customer and status of key products.</p>
3.3 Publish a Monthly Newsletter	The newsletter is intended to communicate and inform our members, customers, and sponsors of our ongoing activities, upcoming events, and interesting project information.	<p>3.3.1 Distribute Monthly Newsletter to the PDWG and post to the EFCOG PDWG Webpage.</p> <p>Note: Monthly newsletters have been published and are posted</p>

Additional Information:

1. Other Working Group Activities
 - a. Weekly and monthly conference calls
 - b. Face to face meetings

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- 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 FY2022
 - 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 FY2022. 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.