**Energy Facility Contractors Group**

**Project Delivery Working Group**

**FY2016 Annual Work Plan**

**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 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 delivery. Areas of focus and collaboration include:

* Project and Earned Value Management
* Cost Estimating
* Scheduling
* Acquisition strategy
* Contract alignment and incentives
* Integration of safety into the design process and other technical processes
* Engineering
* Start-up and commissioning

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.

In FY2015, several existing EFCOG working groups were consolidated and streamlined to form the PDWG, including elements of the Project Management Working Group, the Engineering Practices Working Group, and the Business Management Working Group. In FY2016 the PDWG is further streamlining its organization into two primary focus areas: Project Management and Project Controls. The primary intent of the PDWG focus areas in FY2016 is to provide better organizational focus on improvements across the entire project lifecycle and to align our efforts with DOE’s actions on “*Improving the Department’s Management of Projects”.*

The Project Management focus areas will be project management, construction management, risk management and project engineering. The Project Controls focus areas will be earned value management, cost estimating, scheduling and business management. These efforts will be integrated 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.

The “EFCOG PDWG Planned Activities for FY2016” are detailed in the table below.

**EFCOG PDWG Planned Activities for FY2016**

| Activity(s) | Benefit(s) | | Deliverable/Key Milestone(s) |
| --- | --- | --- | --- |
| 1.0 FY2016 Project Controls Initiatives | | | |
| 1.1 Support Earned Value Management implementation of the Project Management Assessments and Oversight (PMOA) EVMS Interpretation Handbook (EVMSIH) | The purpose of the specific enhancements contained in the FY2016 Work Plan is to further develop a “process” vs. “people” driven outcome that yields consistent and accurate assessments of any contractor’s EVM state of compliance.  Expected outcome: Using the deliverables identified in the FY2016 initiatives, PMOA or EFCOG individuals with a reasonable level of EVM experience can successfully perform EVMS review/ surveillance and uniformly capture record and evaluate the results, and provide a meaningful, consistent assessment of the contractor’s EVMS. | | 1.1.1 Development of certification/surveillance standardized Data Call List **(200 Hours)**  1.1.2 Verbatim conversion of the EVMSIH into an Excel format template for use by all in performing and documenting EVMS reviews/ surveillances (PMOA & Contractor)  **(300 Hours)**  1.1.3 Illustration of the PMOA EVMSIH to include all compliance tests and document/data comparisons **(300 Hours)**  1.1.4 Integrating (where practical) the PMOA and Contractor Review/ Surveillance EVMS schedule for Peer Reviews to get in front of the PMOA review **(200 Hours)**  1.1.5 Host a SME working session in November FY2016. Conference exemption approval received.  **(300 Hours)**  **(1300 Total Labor Hours)**  Note: Dates for the above action items will be jointly developed with DOE-HQ PMOA staff and EFCOG |
| 1.2 Cost Estimating will evaluate alignment to the GAO Estimating Process, develop an alignment matrix to reflect the results, and identify the estimating points of contact for the EFCOG contractors | This will provide documented best practices in meeting the GAO 12-step process.  This alignment promotes continuous improvement of estimates across the DOE complex.  Establishment of the estimating POCs provides a forum for contractors to evaluate and provide contractor perspective on the estimating challenges experienced across the DOE complex. The estimating POCs will provide important feedback and recommendations/ solutions to the DOE estimating challenges. | | 1.2.1 Analysis of current EFCOG contractors estimating processes to the alignment with the GAO steps by February FY2016  1.2.2 Develop a recommendation and framework (including an implementation matrix), which could include best practices, for common understanding and implementation of the GAO 12-step process checklist for 413.3B Project Estimates - September FY2016  1.2.3 Identification of an estimating point-of-contact (POC) for each EFCOG participating site by August, 2016  (**300 Total Labor Hours)** |
| 1.3 Scheduling will develop Integrated Master Schedule (IMS) Supplemental Guidance (SG) to facilitate (IMS SG) consistent implementation of the EVMSIH | Establishment of the IMS SG will address common challenges and their resolution with respect to implementation of the EVMSIH. | | 1.3.1 Draft IMS SG consistent with the GAO Schedule Assessment Guide for distribution to the EFCOG community for review and comment by June 2016  **(300 Total Labor Hours)** |
| 2.0 FY2016 Project Management Initiatives: | | | |
| 2.1 Provide review comments and support comment disposition for pending revisions to DOE O 413.3B and associated guides | Ensure that process/step/deliverable changes resulting from the revised documents are clearly stated and to support consistent implementation by DOE contractors. | | 2.1.1 Provide comments to DOE HQ point of contact on proposed changes to 413.3B, and guides. **(530 Labor Hours)** |
| 3.0 FY2016 Subject Matter Experts Initiatives: | | | |
| 3.1 DOE-STD-1189, Integration of Safety into the Design Process, Consolidated Pre-Rev/Com Review | The DOE-HQ Sponsor, Pranab Guha, has provided EFCOG an opportunity to provide early review and comments to a revision of DOE-STD-1189. By providing Pre-Rev/Com review and comments, EFCOG will be able to address potential concerns early in the process, create a document that meets both Contractor and DOE objectives, and should be able to accelerate the publication process. | | 3.1.1 Provide initial comments. Provide resources to address comment responses. Support communication of changes and implementation of the revised document. Partner with the Safety Working Group  **(100 Labor Hours)** |
| 4.0 FY2016 PDWG Administrative Initiatives: | | | |
| 4.1 Develop a PDWG list of functional area subject matter experts that can support contractor and DOE requests for support of peer reviews and other initiatives | | Utilizing the SMEs across the complex will support efforts of  *“Improving the Department’s Management of Projects”.* | 4.1.1 Assemble, publish and continuously update SME contact list  **(60 Total Labor Hours)** |

|  |  |  |
| --- | --- | --- |
| 4.0 FY2016 PDWG Administrative Initiatives (cont.): | | |
| 4.2 PDWG internal communications | Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex.  Topic specific workshop developed in coordination with DOE (HQ and Field) | 4.2.1 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  4.2.2 Workshops and operational meetings twice per year aligned with the EFCOG General Session. Maintain and publish agenda, action item list and presented materials  4.2.3 Posting of meeting minutes, presented materials and notices to working (or task) group website and/or EFCOG website, as appropriate  4.2.4 Update and post Master PDWG contact list  **(250 Total Labor Hours)** | |
| 4.3 PDWG client communications | Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex | 4.3.1 Communications with PDWG DOE Liaison Paul Bosco and DOE personnel and Task Sponsors as needed  4.3.2 Reporting to DOE on EFCOG deliverables and best practices  4.3.3 Develop a communication zipper chart between EFCOG and DOE  **(125 Total Labor Hours)** | |

Additional Information:

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. An annual report will be prepared that describes accomplishments. Planning for FY2017 focus areas will be conducted, resulting in an Annual Work Plan for FY2017. It is anticipated that two working group meetings will be held in FY2016. EFCOG workshops, PDWG working meetings, and working/planning sessions will coincide with the EFCOG Annual Meetings.