**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 which 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.

The EFCOG Project Delivery Working Group Planned Activities for FY 2018 (October 1, 2017 – September 30, 2018) are detailed in the table below.

| Activity(s) | Benefit(s) | Deliverable/Key Milestone(s) |
| --- | --- | --- |
| 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.  *New* | The purpose of the specific activities contained in the FY2018 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  1.1.2 Provide support to the development of a PM-30 scheduling implementation guide. |
| 1.2 Review and identify impacts/strategies for implementation of the “Requirements for Management of EM’s Cleanup Program” policy  *New* | Identification of gaps that exist between the current operation protocol and the new “Requirements for Management of EM’s Cleanup Program” | 1.2.1 Report on the impacts and recommendations for implementation of the “Requirements for Management of EM’s Cleanup Program” |
| 2.1 Support DOE efforts in the development of DOE guides and revisions. Provide review comments, support comment disposition/resolution, and implementation.  *Ongoing* | 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 applicable DOE guides |
| 2.2 Continue to provide Project Peer review candidates based on DOE request  *Ongoing* | DOE receives Contractor resources to perform reviews, Contractors receive the educational benefit and perspective | 2.2.1 Provide qualified resources for PM-30 reviews as requested |
| 2.3 Cost Estimating Produce a draft crosswalk tool for standardized compliance with the GAO and DOE estimating guides  *Ongoing* | Standardized and tailorable format used to demonstrate GAO/DOE 12 Step compliance/alignment | 2.3.1 Provide the PDWG approved version of the tool to the participating EFCOG sites for use on a trial basis, and report back on the effectiveness of the tool to demonstrate compliance / alignment improvement |
| 2.4. Investigate the risk management software products used throughout the complex, document their strengths and weaknesses and perform an evaluation of their functionality and application to specific uses*.*  *Ongoing* | Helps standardize the use of software throughout the DOE Complex and provides guidance on what type of software will work for a specific need. As the costs and functionality of software vary greatly this will avoid unnecessary cost of procuring the incorrect software or a costly software product where a less expensive one will be adequate. Also matching the optimal software to the application ensures a more efficient and effective Risk Management process. | 2.4.1 Using the roadmap issued as a deliverable in late FY17, and the results from the FY17 Risk Management survey, complete the study and issue a report with recommendations for the use of different software packages in different applications |
| 2.5 Investigate eliminating bias in schedule development and schedule uncertainty.  *Ongoing* | Identifying and defining the different types of bias that influence practitioners when estimating uncertainty ranges and risk impacts, and providing recommendations (up to and including tools to avoid bias), enables a more reasonable calibration of risk and uncertainty and will result in a more accurate derivation of Management Reserve and Contingency | 2.5.1 Using the roadmap issued as a deliverable in late FY17, complete the study and issue a report with recommendations |
| 2.6 Investigate the practice of managing schedule margin for baseline/PMB/Status File/Methodology  *Ongoing* | Having a uniform and best practice of managing schedule margin used throughout the DOE Complex will reduce errors, misunderstandings and minimize the potential for schedule overruns. It will enable personnel e.g., FPDs, EIR teams, ICE teams etc., to transition easily between sites and increase their effectiveness. | 2.6.1 Using the roadmap issued as a deliverable in late FY17, and the results from the FY17 Risk Management survey, complete the study and issue a report with recommendations of best practices for managing schedule margin |
| 2.7 Support U.S. Department of Energy Office of Project Management Oversight and Assessments (PM) in establishment of their implementation approach for the “Program Management Improvement Accountability Act”  *New* | Facilitates implementation of PM’s obligations under S.1550 Public Law 114-264 (12/14/2016) | 2.7.1 Support review and comment of the PM wide policy  2.7.2 Support PM Training & Certification |
| 3.0 Support DOE efforts in the development of a Start-up and Commissioning Guide.  *Ongoing* | Fostering interface and integration of contractors with DOE counterparts to capture collective experiences and lessons learned. Facilitate and improve the transition from construction completion to operations. | 3.1.1 Identify best practices and collaborate in the development of the Guide  3.1.2 Deliver a draft start up and commissioning guide based on collaborative efforts of the FY17 team  3.1.3 Roll out commissioning guide and associated libraries for reference material and lessons learned |
| 4.1 Collect data from various sites regarding site or program specific guidance for differentiation between OPC, TEC and TPC  *Ongoing* | Discovery and determination of practices utilized by various sites to understand conflicts with DOE guidance and/or possible ways to provide best practices. | 4.1.1 Issue a clean best practices document incorporating results of both data call surveys  4.1.2 Develop best practice relative to funding and spend profiles, use of carry-over, aligning funding to risk events on the schedule. |
| 4.2 Participate and support in development of a DOE Guide for differentiation of OPC, TEC and TPC costs. | Clarity and consistency of allocation of costs, taking into consideration program, project and contract types across the Complex. | 4.2.1 Provide data call metrics and develop a plan with DOE sponsor or lead to obtain a timeline for the Guide |
| 5.1 Expand PDWG “Rolodex”/list to include a consolidated list from EFCOG/SMEs  *New* | Utilizing the SMEs across the complex will support DOE efforts of *“Improving the Department’s Management of Projects”* and support agency reciprocity | 5.1.1 Develop an 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 |
| 5.2 PDWG internal communications  *Ongoing* | 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). | 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  5.2.2 Workshops and operational meetings twice per year. Maintain and publish agenda, action item list and presented materials  5.2.3 Posting of meeting minutes, presented materials and notices to working (or task) group website and/or EFCOG website, as appropriate  5.2.4 Update and post Master PDWG contact list  5.2.5 Hold a leadership meeting for strategic planning prior to the EFCOG Annual meeting |
| 5.3 PDWG client communications  *Ongoing* | Information sharing, knowledge transfer and consistency of purpose in EFCOG activities to best support the DOE complex. | 5.3.1 Communications with PDWG DOE Liaison Paul Bosco and DOE personnel and Task Sponsors as needed  5.3.2 Reporting to DOE on EFCOG deliverables and best practices  5.3.3 Develop a communication zipper chart between EFCOG and DOE  5.3.4 Update and improve presentation of and access to information on EFCOG website for ease of use |
| 5.4 Regulatory Reform Initiative  Consistent with Executive Order 13777  The EFCOG PDWG Team will review Policy and contract requirements to identify regulations that:  (i) eliminate jobs, or inhibit job creation;  (ii) are outdated, unnecessary, or ineffective;  (iii) impose costs that exceed benefits;  (iv) create a serious inconsistency or otherwise interfere with regulatory reform initiatives and policies;  (v) are inconsistent with the requirements of section 515 of the Treasury and General Government Appropriations Act, 2001 (44 U.S.C. 3516 note), or the guidance issued pursuant to that provision, in particular those regulations that rely in whole or in part on data, information, or methods that are not publicly available or that are insufficiently transparent to meet the standard for reproducibility; or  (vi) derive from or implement Executive Orders or other Presidential directives that have been subsequently rescinded or substantially modified.  New | Provides a basis for DOE consideration in repealing, replacing, or modifying subject policies, requirements to gain efficiencies and eliminate unnecessary or overreaching regulation | 5.4.1 Once identified, document the basis for the policy/Contract requirement selection, support with objective evidence, socialize with contractor management, and communicate results to DOE. |

Additional Information:

1. Other Working Group Activities
   1. Weekly and monthly conference calls
   2. Face to face meetings
   3. Other Working Group and lower tier activities not covered in the table above
2. Reporting and Communications
   1. Plans for meeting minutes
   2. Plans for any subgroups and/or task teams that may be ending/completing during FY2018
   3. 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 FY2018. 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 FY18.