

# FY2023 AWP REV. 0

## 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. 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 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)	Benefit(s)	Deliverable/Key Milestone(s)/Status	Owner	Est. Comp. Date
<b>1.0 Project Management Subgroup – T. Heath/A. Steiman</b>				
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.	Provide comments to DOE HQ point of contact on proposed changes to applicable DOE guides		As needed
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	Provide qualified resources for agency reviews as requested		As needed
3. Understand DOE project path forward for Net Zero-Carbon free project execution.	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 spec-guidance for a conceptual design and performance based functional requirements and demonstration of the PMO need to look like. (NREL example best practice and checklist – how to manual)?? (Diane Cato – Joan)	Leverage the lessons learned from NNSA Pilot and determine how to execute “commercial” like projects at EM sites.	Develop a white-paper that includes lessons learned and process/approaches to be considered within the EM Framework.	D. Cato	6/30/23
5. Understand and document lessons learned from NNSA pilot projects using commercial practices		Support the development of commercial like project exemptions	T. Heath	2/1/23

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for non-nuclear/non-hazardous facilities builds		Contact PM-30 regarding IPT Understand the why behind wanting an appendix		
6. Focus on recruitment of PMs to the PDWG			T. Heath R. Dodd A. Basche PDWG Board	Ongoing
<b>2.0 Risk Management – J. Wargo</b>				
1. 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.	By promoting (through training) an awareness of the kinds of bias that influence our judgement, the following benefits will be realized: <ul style="list-style-type: none"> <li>• Greater objectivity in decision-making</li> <li>• More accurate cost and schedule estimates,</li> <li>• Increased creativity in the Alternatives Analysis and Value Engineering processes</li> <li>• 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</li> </ul>	Issue a guide to specific bias reduction techniques that can be applied to improve judgement effectiveness through Program of process enhancements - <b>Ongoing</b>  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) - <b>Ongoing</b>	J. Wargo	9/30/23
2. Develop a best practice which outlines the role of Risk Management in pre-	Currently no detailed guidance is provided as to the role of Risk Management and the	Review and evaluate Risk Management Methodologies,	J. Wargo	7/30/23

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CD-2/3A activities and provides consistent guidance	level of 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.	the role Risk Management plays and the deliverables produced prior to the CD-2/3A effort. Develop and recommend best practices in a white paper		
3. 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.	Provide recommendations for updating DOE G 413.3B-7B (in comparison to the existing methods reflected in the literature outside of the Department)	J. Wargo	9/30/23
<b>3.0 Project Controls – L. Cazalet</b>				
1. Facilitate implementation of the PM Maturity and Environment Total Risk Rating (METRR) tool	Help with roll-out to the sites	Provide qualified resources	T. Spillman	09/30/23
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.	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	Provide qualified resources to support PM-30 and EM-5.22 requests, as needed	L. Cazalet	09/30/23

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	schedule cost, and performance in support project deliveries.			
3. Conduct Integrated Master Schedule (IMS) – Peer Reviews and provide Recommendations for IMS solutions to include: <ul style="list-style-type: none"> <li>Rolling Wave Planning</li> <li>IMS Reasonableness</li> <li>IMS Quality</li> </ul>	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? - (Dereck Lehman and Janay Bloch – TBD)	Submittal of a review team report that reflects observations and recommendations	D Lehman J. Bloch	09/30/23
4. Project- Subproject path forward (white paper from PC team) – Understand the PARS driver	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?		P. Tackett	03/31/23
5. EVMS Metrics (V5.0) Provide CCB input to simplify / Identify Primary & secondary / Remove duplication / New if warranted			A. Gilstrap D. Marbourg, B. Langdon	06/30/23
6. EVMS Compliance / Surveillance Reviews MSTs+ // Plan SRNS and CNS*	Cross collaboration of contractors and DOE enhancing the EVMS environment	CNS@Pantex / IEC / SRMC / NWP* MSTs+ // Plan SRNS and CNS	D. Marbourg	Ongoing

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7. Commit to 2 EFCOG Peer Review of METRR scoring			D. Lynch	5/1/23
8. Create a standard form for a CAP (Tony Spillman)			T. Spillman	03/31/23
<b>3.0 Administrative</b>				
1. PDWG internal communications	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	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	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.  <b>Note:</b> 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 FY2023
  - 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 FY2023. 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.