



A monthly newsletter of the Energy Facility Contractors Group's Project Delivery Working Group

Issue 9

April 2020

Project Management

Greetings, PDWG Team Members. Hoping this issue of the "Practitioner" finds all of you and yours safe.

Given our current environment, what could be more appropriate than practical guidance to consider as we find ourselves in the planning stages of restarting our projects? For this month's issue we bring you the article below, written by Warren Phillips, a Senior Consultant and Project Manager at HRchitect. While the case scenario profiles an "IT" project, the guidance can be applied to any type project that is interrupted for any reason.

Additionally, project teams should be vigilant in their strategies for restart to ensure deviations from approved policies, procedures, processes, and practices are reviewed, approved, and communicated before implemented. Where uncertainty exists seek support from your team members, management, and stakeholders. Since we are on the same team, make sure all team members are on the same page.

Project Restart Guide: 7 Areas to Document When Putting a Project on Hold

This article was originally published on the [HRchitect blog](#), November 6, 2018

Here's the scenario: You have an important software implementation project that you've been leading and making good progress on. You are almost complete with the requirements definition phase when a data issue brings progress to a halt. Because resolution will not occur for several months, the project Steering Committee asks to put the project on hold, allowing the team to work on other projects in the interim. After all, the team is experienced and knowledgeable – their reputation keeps them in high demand.

In 1965 Psychologist Bruce Tuckman defined the path to high-performance that most teams follow: "forming, storming, norming and performing".

- **Forming** – Learning about each other.
- **Storming** – Challenging each other.
- **Norming** – Working with each other.
- **Performing** – Working as one.

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Your team has worked on the project together and matured to where their journey has them at the “Performing” level. When this project restarts, you want the team to pick back where they left off, not revert back to forming. As the project manager, you assess the potential risks of an extended project hold. Some of the risks include:

- **Loss of key team members** – this requires replacing resources (team members) which may require lead time to obtain and require “Onboarding” and time to come up to speed.
- **Loss of project memory** – the loss of “head” knowledge within the team about the inner workings of the project, including technical and process understanding. Another loss of project memory comes in the form of a loss of an understanding of the history about key decisions.
- **Loss of project relationships** – the network of connections within the team, as well as between the team and key external organizations and people. If there is significant turnover in the makeup of the team, the team may experience initial inefficiencies as they gel again into a mature team.

Now you consider actions that can be taken now to mitigate those risks. One of the best courses of action you, as the project manager, can take at this point is to **put together a Project Restart Guide** to ensure you’re well-prepared to successfully relaunch the project when the time comes.



There are seven key areas you should document in your Project Restart Guide.

1. Reasons for Project Hold — Fully document and list out in detail all the reasons for the project hold. This includes dates, who made/communicated the information, and any context provided around why the decision was made. Capturing this information when it is first communicated is key, as it decreases the chances that information could be forgotten or misremembered. Why should you do this? So that you can accurately answer specific questions about why the project was suspended without needing to rely on recollections.

2. Contacts for Project Restart — Identify who is the single contact for project status during the hold and for initiating a restart of the project. If the project involves multiple vendors, also list the key contacts for a project restart at each of the organizations. Why is this important? This formally establishes a network of knowledgeable leaders who can come together to restart the project at the right time.

3. Teams — List all of the existing team members at the time the project was placed on hold. That includes:

- Your **Core team** (Project Managers, Functional Leads)
- The **Extended team** (IT, Marketing, HR, Finance)
- The **Business Unit** key contacts that were involved
- All other **Stakeholders**

The PRACTITIONER

Published monthly for the EFCOG’s Project Delivery Working Group by:

Craig Hewitt
(writer/editor)
(509) 308-2277
Craig_T_Hewitt@rl.gov

Adam Russell
(publisher)
(509) 376-5742
Adam_Russell@rl.gov

Tony Spillman
(managing editor)
(509) 372-9986
Anthony_W_Spillman@rl.gov

For questions, comments, story ideas or other correspondence, call or e-mail Craig Hewitt at the contact information above

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When you do this, it is helpful to include full contact information and identify project role / expertise. If the project involves multiple vendors, also list the key people your team has been dealing with on the other side. It is the people that make a project successful, and it can make a world of difference when you have the right people from vendor organizations working with your team.

Tip! *If a resource at a vendor does a good job, tell that person and tell their manager. In addition to giving them well-deserved recognition, you are more likely to work with that person again, and there is nothing wrong in asking for someone specific to be a part of your project team. If it is at all feasible given their workload, it's highly likely their manager will accommodate.*

4. Adding New Team Members

If one or more of your original team members can no longer participate in your project, you'll need to onboard new team members. Onboarding a new team member to the team is a critical process. If this is done well, the team will reform and more efficiently achieve "Performing" status.

To help with this process, you can create a list of onboarding tasks that the new team member must do. Include information on:

- Access to project shared document repository sites and a list of documents to be reviewed
- Access to training courses and a list of lessons to be completed
- Access to systems required for project participation
- Mentors / Job Shadowing
- Lifelines – who to reach out to for help

5. Workflows / Next Steps to Restart

Define the main workflows within the project – such as Benefits, Time Entry, Payroll, Learning. Don't forget change management – it is also a workflow and will need to be restarted, too.

For each workflow, identify, in detail, the following:

- **Overview** – high level description of status at time of hold and what must be done to restart.
- **Project Documents** – where are the most current documents maintained for the workflow – Workbooks, Project Plan, Requirements, Signoffs. Provide URLs for these documents and specifically list key documents by name.
- **Open Issues** – list out all open issues and action items. If you've documented those items somewhere else and don't want to duplicate efforts, you can just reference where they can be found, such as in a Workbook.
- **Action Items to Restart** – including steps. For example:
 - ◇ Changes that are updated in the workbook will be analyzed when team returns from the freeze
 - ◇ Review open issues log and risk register
 - ◇ New Team Members Onboarded
 - ◇ Schedule meetings – Kickoff and ongoing
 - ◇ Schedule and complete UAT and DILO (Day In the Life Of) Testing

Tip! *Prior to the project going on hold, it is very important that the team update all existing documents to the most current state. Have the team also provide a list of pending decisions*

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or actions that are not otherwise captured in the project documents. Most projects will have dynamic email exchanges/phone calls occurring that are not documented and would be lost unless that team member returns and can locate the email history. This is a really helpful step in preserving project knowledge.

6. Scope/Budget

Make sure to identify the location of most current statement/scope of work (SOW), document current budget status, and identify any change orders that will need to be assessed/established upon project restart.

7. Lessons Learned

If there are any lessons you've learned from the efforts on the project thus far, now is a good time to document those. Consider the areas of Project Planning/Project Management, Training, Testing, Integrations, and Collaboration when you're working on this.

In summary, a good record of the project at the time the project was put on hold will serve you extremely well when it comes time to restart the project. Documenting key information in the areas of reasons for the project hold, contacts for the project restart, teams, adding new team members, workflows/next steps to restart, scope/budget, and lessons learned will leave you with a thorough Project Restart Guide.

Check out the latest DOE Project Management newsletter!

(Click on the banner below)

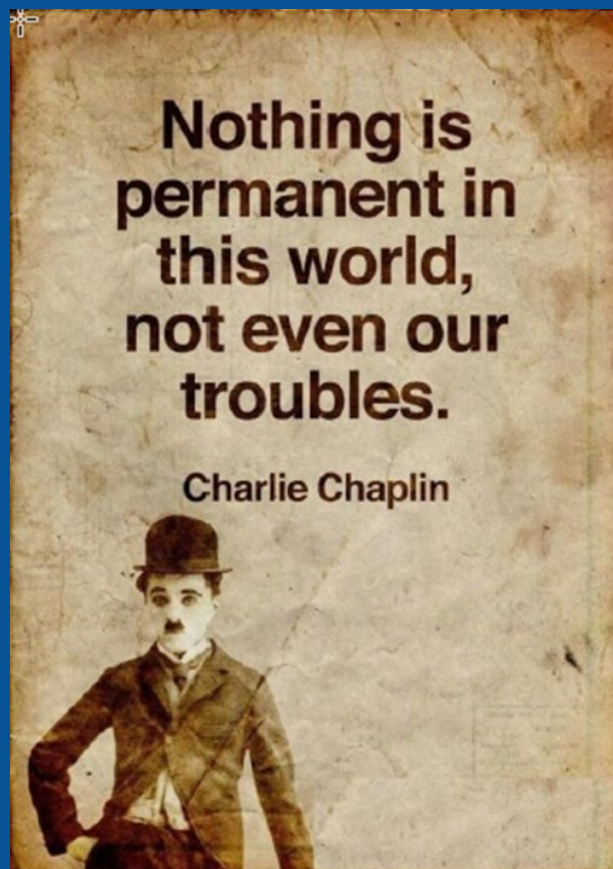


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It is not one world



Charlie Chaplin

PDWG Goings-On

Upcoming events:

 **EFCOG Project Controls Subgroup Task Team Meeting, Thursday, April 16, 2020, 10 a.m. – 2 p.m. PDT**

Click [HERE](#) to register for this online event

A full agenda and instructions can be found on the next page

Project Controls Subgroup Task Meeting

Instructions and Agenda

Matthew West invites you to attend a Web seminar using Webex.

Event Number: 905 500 569

Event Password: This event requires registration. After your registration has been approved, you will receive instructions for joining the event.

Additional Detail:

Update – 8 April 2020. ALL PLEASE READ – ACTION REQUIRED... We have 61 who have accepted and 6 who are tentative. On behalf of Mel, Lisa, and Andrea, thanks for setting

ing this time aside to meet. In order to address the larger size Web meeting, we have set up a Cisco Web Ex Event rather than a meeting. This provides more tools, to include panelists, Q&A function to make sure we address all questions. It does mean there is an extra step, that of registration for the event in CISCO Web Ex. Please take a few minutes to register for the Cisco Web Event over the next couple of days, even if tentative. So far only 4 have register. Thank you.

1. Use the link below to register:

<https://doe.webex.com/doe/j.php?MTID=e970fa2b7a0ee110e4322dd52d99fb8fa>

2. After you register, you will get an email from messenger@webex.com showing your approval and providing a link for the event. Please keep this email to let you join on the 16th. The link has the event information in it, to include the event password. We have set up the event so you can join up to 15 minutes prior to its start.

3. Please do not use the audio conference only option when you join. It is important that you join on the computer first, then select the audio option inside the connection, whether it is using audio over the computer or you select to have the system call you or you call in. With this large of a group, we need to make sure the audio is associated with the person logged on.

4. If possible, please use a camera.

Agenda

1300 to 1315 – Welcome, roll call (Mel /Lisa)

1315 to 1325 – EPA SOP release (PM-30)

1325 to 1340 – ECRSOP / CAG Update (PM-30)

1340 to 1342 – EVMS and Scheduling Guide Updates (PM-30)

1342 to 1415 – EFCOG work on resource loaded schedule – Group discussion on challenges and difference – path forward

1415 to 1445 – MR White Paper – discussion and next steps

1445 to 1455 – Stay Connected - Break

1455 to 1520 – CPP upload document updates, integration of IPMR DID and CSFR DID. Will be send out prior to meeting to seek comments (PM-30)

1520 to 1535 – ASU Study Update

1535 to 1545 – Vender news (Deltek Cobra Update, Cloud EVM, etc – not a recommendation one way or the other, but update on issues such as Cobra 8.4 stopping CMP extraction) (PM-30 / CNS lead discussion)

1545 to 1555 – PARS updates (PM-30)

1555 to 1600 – Close out full group meeting

1600 to 1605 – Break / Transition to Best Practices sub team meeting.

1605 to 1610 – Welcome, verify attendees (Andrea/ Zac)

1610 to 1620 – Group 1 report

1620 to 1630 – Group 3 report

1630 to 1640 – Group 4 report

1640 to 1650 – Group 5 report

1650 to 1700 – Group 6 report

1700 to 1715 – Discuss options for Group 2 / confirm path forward / Close Out

Just for Fun: April's Notable Events and Famous Birthdays

1 — **Apple Computers was founded** (1976), and March Madness champions were crowned in 1985 (Villanova), 1991 (Duke), 1996 (Kentucky), and 2002 (Maryland).



2 — Singer Marvin Gaye (1939), and actor Dana Carvey (1955) were born.

3 — Actors Marlon Brando (1924) and Alec Baldwin (1958), comedian Eddie Murphy (1961), and Olympic champion skier Picabo Street (1971) were born.

4 — The North Atlantic Treaty Organization (NATO) was signed (1949), actor Robert Downey Jr. was born (1965), and Martin Luther King Jr. was assassinated (1968).

5 — Actors Spencer Tracy (1900), Bette Davis (1908), and Gregory Peck (1916) were born.

6 — The first modern Olympic games opened (1896), explorers Matthew A. Henson and Robert E. Perry reached the North Pole (1909), **Twinkies were introduced** (1930), and country singer Merle Haggard (1937) was born.



7 — Jazz singer Billie Holiday (1915) was born, the World Health Organization was founded (1948), actors Jackie Chan (1954) and Russell Crowe (1964) were born.

8 — Siddhartha Gautama, founder of Buddhism (563 BC), and former First Lady Betty Ford (1918) were born, and Hank Aaron broke Babe Ruth's home run record (1974).

9 — The Civil War ended with the Confederate surrender to the Union (1865), and publisher Hugh Hefner was born (1926).

10 — The American Society for the Prevention of Cruelty to Animals was established (1866), the PGA was formed (1916), and sportscaster John Madden was born (1936).

12 — Author Tom Clancy and TV personality David Letterman were born (1947), and Russian cosmonaut Yuri Gagarin became the first person in space (1961).

13 — 3rd U.S. president Thomas Jefferson (1743), and wild west outlaw Butch Cassidy (1866) were born.

14 — President Abraham Lincoln was assassinated (1865), **baseball star Pete Rose** (1941), and actors Brad Garrett (1960) and Sarah Michelle Gellar (1977) were born.



15 — Artist/inventor Leonardo da Vinci was born (1452), and the Titanic sank (1912).

16 — Aviator Wilbur Wright (1867), actor Charlie Chaplin (1889), and basketball Hall of Famer Kareem Abdul-Jabbar (1947) were born.

17 — Actress Jennifer Garner (1972) was born.

18 — **The Great San Francisco earthquake struck** (1906), baseball Hall of Famer Catfish Hunter (1946), actor Rick Moranis (1953), and TV talk host Conan O'Brien (1963) were born.



19 — The Revolutionary War began (1775), actors Dudley Moore (1935), Ashley Judd (1968) and Kate Hudson (1979) were born, the Branch Dividian siege ended (1993); and the Federal Building in Oklahoma City was bombed (1995).

20 — Nazi leader Adolf Hitler (1889) and singer Luther Vandross (1951) were born, and the mass shooting at Columbine High school in Littleton, Colorado, took place (1999).

21 — Queen Elizabeth II of England was born (1926).

22 — Rock star Peter Frampton was born (1950).

23 — Playwright William Shakespeare (1564), 15th U.S. president James Buchanan (1791), actress Shirley Temple (1928), and singer Roy Orbison (1936) were born.

24 — Singer/actress Barbara Streisand (1942) and singer Kelly Clarkson (1982) were born.

25 — Jazz singer Ella Fitzgerald (1918) and actor Al Pacino (1940) were born, the United Nations was organized (1945), and actress Renee Zellweger was born (1969).



26 — Naturalist John James Audubon (1785) and **entertainer Carol Burnett** (1933) were born.

27 — Telegraph inventor Samuel Morse (1791), and Civil War general and 18th U.S. president Ulysses S. Grant (1822), were born, and the first Social Security checks were distributed (1937).

28 — 5th U.S. president James Monroe (1758), former Iraqi president Saddam Hussein (1937), and TV personality Jay Leno (1950) were born.

29 — Jazz bandleader Duke Ellington (1899) was born, the zipper was patented (1913), and race car legend Dale Earnhardt (1951), comedian Jerry Seinfeld (1954), and actresses Michelle Pfeiffer (1957) and Uma Thurman (1970) were born.

30 — Country singer Willie Nelson (1933) and basketball Hall of Famer Isiah Thomas (1961) were born, the Vietnam War ended with the fall of Saigon (1975), and actress Kirsten Dunst was born (1982).

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