

THE PRACTITIONER

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



EFCOG

Issue 57

April 2024

Greetings EFCOG PDWG Practitioners! Spring has arrived with new opportunities to lead the way capitalizing on innovative approaches to continuously improve our project management practices. Since 2019, PM-30 has been developing and now utilizing an effective approach in assessing the environment in which our earned value management systems are operating. Good environments proliferate the benefits of earned value and it uses, while poor environments have the opposite effect. If you haven't yet had the benefit of an environment assessment, read on to learn more about the Background, Research Study Results, Process, and the potential Benefits. There is also an opportunity for you to provide an expression of interest to gather at one of our DOE sites to gain additional experience with the Environment Assessment facilitation training.

Also in this issue of the Practitioner we have a brief report-out of the recent Project Controls Subgroup Meeting held last month in Tucson, followed by our "It's Not One World" offering.

DOE Facilitated Environment Assessment Benefits

Background:

An EVMS environment assessment is facilitator-led and employs the results of the Department of Energy (DOE)-sponsored Arizona State University (ASU) EVMS Research Study. The assessment looks at a program or project Culture, People, Practices and Resources, with respect to 27 factors.

The DOE ASU Study was started in April 2019 (ongoing) to explore areas of consensus and conflict on the use of an EVMS to manage projects. The most notable result coming from the ASU EVMS study is the Integrated Project Program Management (IP2M) Maturity and Environment Total Risk Rating (METRR). IP2M METRR collects ratings and comments producing environment assessment scores that are plotted, measuring the condition of the environment the EVMS is operating within. An environment assessment considers customer, contractor, and stakeholder behaviors. The facilitation is typically administered by a team of three; a lead Facilitator, assistant facilitator, and an IP2M METRR Tool Administrator.

"Environment refers to all circumstances and conditions (i.e., pressure points) both internal and external to a project."

Research Study Results:

The research study found that there are statistically significant differences between projects implementing a mature (and effective) EVMS, and those who were less committed. Projects implementing an effective

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Environment Assessment Benefits

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EVMS had more reliable data with deeper insights into performance issues. The research found evidence of a causative connection between environment issues and the maturity (and effectiveness) of an EVMS.

IP2M METRR environment assessment scores provide actionable insights to maximize performance and predictability.

Process:

Program or Project team members are grouped by Leadership (Customer and Contractor) and Practitioners, with the assessment administered in three separate sessions. The facilitated environment assessment is a three-step process:

- ☑ Step 1: Listen
- ☑ Step 2: Rate
- ☑ Step 3: Explain

An abbreviated discussion of each environment factor captures the substance of the full IP2M METRR definition to accommodate the timeframe for the discussion.

Each participant provides ratings and commentary (anonymously) using the IP2M METRR Tool within an allotted time:

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-  Not Acceptable
-  Needs Improvement
-  Meets Some
-  Meets Most
-  High Performing

When rating, the participant should consider each factor from their vantage point based on knowledge, observation, and perspective. Concise and descriptive explanations (without names) are required for "Not Acceptable", "Needs Improvement", and "Meets Some" scores. Explanations for "Meets Most" and "High Performing" are encouraged.

Benefits:

- ✓ Awareness of positive or negative effects an environment can have on the effectiveness of an EVMS
- ✓ Results provide insight to customer and contractor beliefs/thinking of the program or project staff
- ✓ Positive results can be understood and emphasized across other programs and projects
- ✓ Negative results can be analyzed, corrected, and mitigated from spreading to other programs or projects
- ✓ Through open and transparent discussions customers and contractors can close the Cultural, People, Practices, and Resources gaps identified
- ✓ Lessons Learned from environment assessments can be considered and applied to future programs and project efforts

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Environment Assessment Benefits

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- ✓ Environment assessments can be applied at contract level or individual project level
- ✓ Project level assessments can be applied at the integrated Project Team (IPT) as part of the institutionalized 413.3 upfront planning process
- ✓ Environment assessments can and should be part of the EVMS self-governance/EVMS Annual Surveillance process
- ✓ Results should be shared with all stakeholders (e.g., DOE local federal staff and DOE HQ Project Management, DOE-EM)
- ✓ Results can and should be shared with contractor sister sites/corporate partners
- ✓ Environment assessment scores can and should be trended at contractor and corporate level to compel and mark improvement
- ✓ Validated and demonstrable environment assessment results could provide bidding advantages

If you are interested in attending the Environment Assessment Facilitator Training, please send an expression of interest to [Craig T Hewitt@rl.gov](mailto:Craig_T_Hewitt@rl.gov).

Energy Facility Contractors Group (EFCOG) Project Delivery Working Group (PDWG) Project Controls Subgroup Meeting March 2024, Tucson, Ariz.

— By Greg Smith

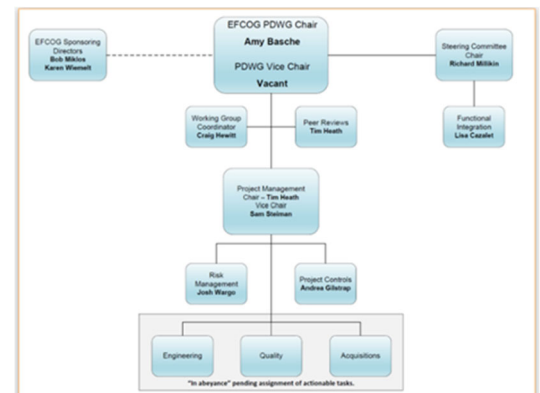
EFCOG:

- DOE Contractors working together to improve operations across the Complex.
- Specifically tackles common problems facing DOE sites and laboratories.
- Over 120 member companies.

EFCOG Working Groups:

- Communications
- Cybersecurity
- Operations
- **Project Delivery – Project Controls Subgroup**
- Safeguards & Security
- Safety

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EFCOG PDWG Project Controls Subgroup Meeting

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PM Workshop Announcement:

- At the PM workshop, they will reveal the Project Controls award, and it will be awarded for the first time in April 2025.
- It's an award for projects "in progress", not completed projects.
- At the PM Workshop, they currently hand out four awards for Capital Projects; this will be the fifth added to the list.

PM-30 Metrics – Daniel Goldsmith:

- Final stages of development. Version 5 should be drafted in the next few months.
- Getting to a smaller group of primary metrics that are 95% automated. If you fail any of the primary metrics, then you step up to the rest of the metrics being ran. Developing new DIQs, but not changing any of the Empower metrics.
- Will be adding some additional summary level metrics with new schema and Empower will be updated. New term – DIQC: Compliance. Running a quality check for the compliance checks.

EVMS Scalability Guide:

- The NDIA guide is very generic for contracts, but the DOE approach is specific for tools and implementation support for smaller projects.
- Discussion about using the built-in scalability of IP2M METRR as a means of tailoring to the individual project.

Master Schedule Integration Methodology:

- Purpose is to demonstrate best practices to setting up and maintaining large projects/programs IMS that include sub-projects that are individually submitted in PARS.
- P6 automated generation of external interface milestones/tasks as SVTs, a feature of DOE CPP JSON.
- P6 capability to combine multiple schedules in one DOE CPP JSON export for a unique PARS ID Project.

IMS Peer Review Whitepaper:

- A 17-page document on conducting Peer reviews of schedules.
- Comprehensive Project Scope Representation
- Substantiated Durations and Logic
- Robust Critical and Driving Paths
- Schedule Target Validation
- IMS peer reviews are a growth opportunity for both reviewers and reviewees. It is ready for EFCOG review.

IP2M METRR Facilitator Training – Kevin Carney:

- Offering a 2-day class at EUG on this Facilitator training. A tool the community can use and will cover both Maturity and Environment.

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EFCOG PDWG Project Controls Subgroup Meeting

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- It will be coursework to get a certification, maybe a test and case study. Two-day training as the first step towards certification. Written exam done there. It will be May 20-21, (Monday-Tuesday), at the EUG. It's on the same day as EFCOG.

Management Reserve Team, Paul Tackett/Bob Loop:

- Four meetings so far, gathering information on language and rules from each site
- Sites are posting their allowable and unallowable use of MR from their SD, and much of the language similar.
- Last meeting: PM30 presentation. Final product from EFCOG will have detailed cases of MR use, flowcharts, Hope to have a product ready for distribution at the PM Workshop.

Shared Services Teams – Rocke Johnson:

- Pulled facility costs that are redistributed to the project, and these are performing discrete work. The concern is maintaining the integration when work scope is being completed without direct budget.
- Also need to define the extent of the condition, how many contractors have this issue.
- They had one meeting with PM-30 and NA63 involved.
- How are project specific indirect/shared service costs for discrete critical activities included in the PMB to achieve meaningful performance measurement.

Tools and JSON Update, Amber Young/Kevin Carney:

- Sites collaborating with PM-30 testing,
- Cobra supports cost data export per DOE CPP, 8.5 CU07
- Empower Support JSON dataset Import, 4.7.2.130, Developing exports for DS11 and DS12 (VARs)
- Deltek to support export of DS17 and DS18 from Acumen Risk
- PM-30 to launch a tool to generate JSON files from Excel
- P6 EPPM Web and Client (Pro) support schedule data export per CPP, 21.12.3

Empower Overview:

- A change has been made to allow for the collection and reporting of ACWP at the Control Account level. Empower didn't support that until now.
- MS SQL Server performance enhancements
- Added Schedule Execution Metrics (SEM) Assisted Intelligence report.
- Added new OTB charts: Single Point Adjustment, Total Contract Variance
- Added support for per-contract templates, allows for template customizations for VARs, EACs, SOWs, etc.
- Added and calculate ACWP burn rates
- Updated Watchdir to support PARS JSON
- New warning after import when FutureEtc dates don't exist in calendar
- Added new "failed" director option for files that fail to import using Watchdir
- EUG is May 20-23. Empower and H&A training 5/20-21. IP2M METRR Facilitator Cert: 5/20-21.

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IP2M METTR and Self Governance:

- This was the one DOE Centric topic at the NDIA general session.
- Primary coverage was an overview of the DOE Guidance covered in the CAG procedure.
- WRPS and LANL representatives spoke to their own Self-Governance process using the IP2M.

It Is Not One World Is Your Data and Information Trustworthy?

So What Exactly is Trustworthy Data?

Trustworthy data is data that can be reliably used by all to make informed decisions. Trustworthy Data characteristics are:

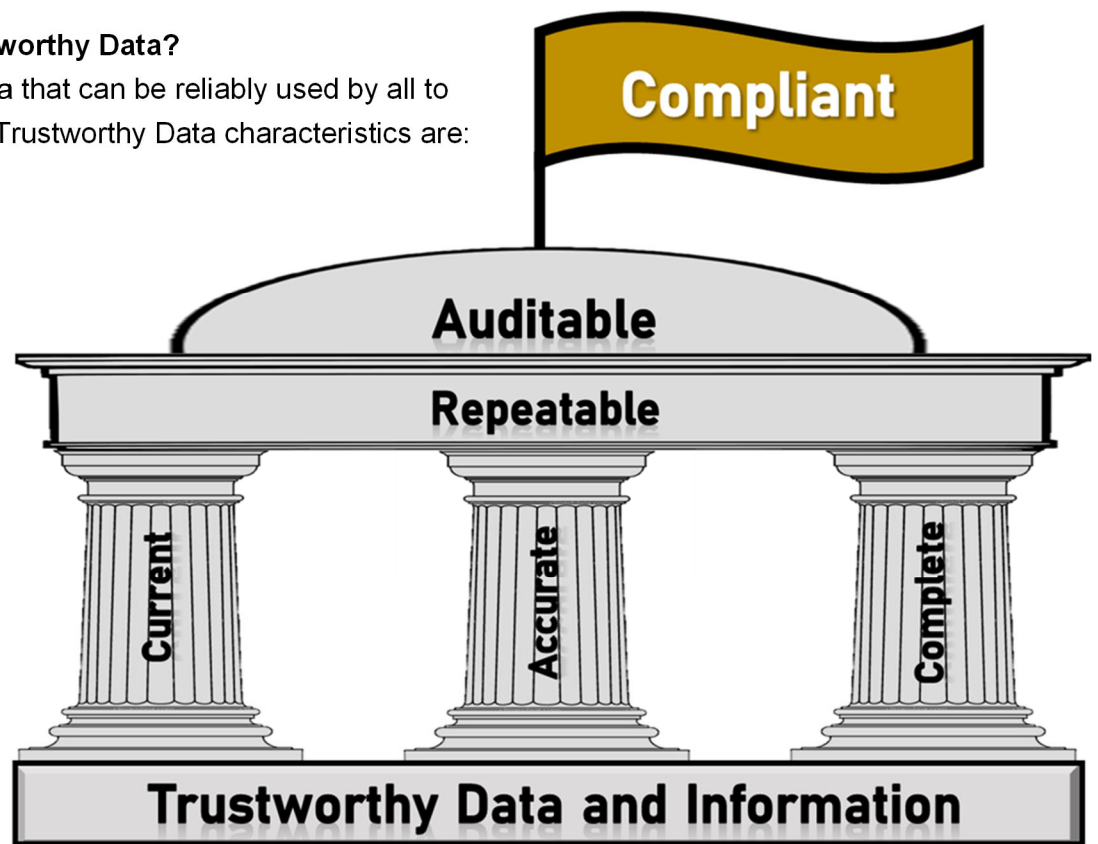
- ✓ Current
- ✓ Accurate
- ✓ Complete
- ✓ Repeatable
- ✓ Auditable
- ✓ Compliant

In short, it is institutionally demonstrated as reconciled and validated.

How are these Characteristics Defined?

Current

As agreed to or directed, such as time now, end of reporting period, or a predetermined specific period of time. Unless the data is current, any use of the data to reflect, project, or trend will be yesterday's news. Current is the lynch pin of each of the other characteristics. If your data and information is not current, there is no need to worry about accurate, complete, repeatable, or auditable. It would be better to start over.



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Is Your Data and Information Trustworthy?

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Accurate

Without error, mistake, miscalculations, or anomalies. If the data is not accurate, there is no need to be concerned about current, complete, repeatable, or auditable. It would be better to start over.

Complete

Comprehensive, all inclusive, total, or entire. If the data is not complete, then current, accurate, repeatable, and auditable do not provide the intended value because you are not seeing the entire picture.

Repeatable

The ability to reproduce current, accurate, complete, and auditable results. If the process is not repeatable, it cannot be demonstrated, or validated, nor can deficiencies be pinpointed and resolved.

Auditable

The ability to trace the source through the entire system/process to validate the results. The inability to audit data or information places both the process and results in an indeterminate status with respect to data/information credibility/trustworthiness.

Compliant

Demonstrated as meeting the Current, Accurate, Complete, Repeatable, and Auditable characteristics (above), and meets specific requirements of applicable governing policies, requirements, procedures, guides or practices.

Current, Accurate, Complete, Repeatable, Auditable, and Compliant can be found in the governing documents below:

- Office of Project Management (PM) Earned Value Management Systems Compliance Review Standard Operating Procedure (ECRSOP)
- Appendix A Compliance Assessment Governance (CAG) 2.0

Issued by Office of Project Management (PM) Project Controls Division

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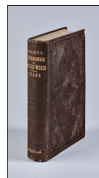
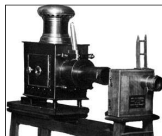
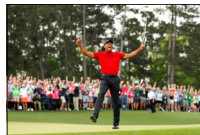
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Just for Fun: April's Notable Events and Famous Birthdays

EVENTS

- 1 — The Royal Air Force was founded (1918), cigarette ads on TV and radio were banned (1970), the first Major League Baseball strike began (1972), and Apple Computers was founded (1976) singer Marvin Gaye was murdered by his father (1984), and Gmail was introduced (2004).
- 2 — Argentina invaded the Falkland Islands (1982), and Pope John Paul II died (2005).
- 3 — The Pony Express began mail service (1860).
- 4 — President William Henry Harrison died after serving only 32 days in office (1841), the North Atlantic Treaty Organization (NATO) was signed (1949), **Dr. Martin Luther King Jr. was assassinated** (1968), the World Trade Center opened (1973), and Microsoft was founded (1975).
- 5 — Kareem Abdul-Jabbar broke the all-time NBA scoring record (1984), and grunge rocker Kurt Cobain committed suicide (1994).
- 6 — The Mormon church was established (1830), the first modern Olympic games opened (1896), explorers Matthew A. Henson and Robert E. Perry reached the North Pole (1909), the U.S. officially entered World War I (1917), and Twinkies were introduced (1930).
- 7 — Hank Aaron broke Babe Ruth's home run record (1974), Frank Robinson became Major League Baseball's first Black manager (1975), and astronaut Ellen Ochoa became the first Hispanic woman in space (1993).
- 9 — The Civil War ended with the Confederate surrender to the Union (1865), and **U.S. forces captured Baghdad during the Iraq War** (2003).
- 10 — The American Society for the Prevention of Cruelty to Animals was established (1866), the PGA was formed (1916), World War II's infamous Bataan Death March began (1942), *The House of Wax*, the first color 3-D movie, opened in theaters (1953), and the Beatles officially broke up (1970).
- 11 — A boxing match was the first live sporting event broadcast on radio (1921), ill-fated Apollo 13 launched (1970), and Ugandan dictator Idi Amin was overthrown (1979).
- 12 — The American Civil War began (1861), President Franklin D. Roosevelt died (1945), and Russian cosmonaut Yuri Gagarin became the first person in space (1961).
- 13 — The first nonstop flight from Europe to North America was completed (1928), Sidney Poitier became the first Black actor to win the Best Actor Oscar (1964), and **Tiger Woods won his first of five Masters golf tournaments** (1997).
- 14 — President Abraham Lincoln was assassinated (1865).
- 15 — **The Titanic sank** (1912), and Jackie Robinson broke Major League Baseball's color barrier (1941).
- 16 — 32 people died in a shooting at Virginia Tech University (2007).
- 17 — The Bay of Pigs invasion began (1961), the Ford Mustang debuted (1964), and Apollo 13 returned to Earth (1970).
- 18 — The Great San Francisco earthquake struck (1906).
- 19 — The Revolutionary War began (1775), the Branch Dividian siege ended (1993); and the Federal Building in Oklahoma City was bombed (1995).
- 20 — A mass shooting at Columbine High school in Littleton, Colo., took place (1999).
- 21 — **The first movie projector was demonstrated in the U.S.** (1895), China's Tiananmen Square protest began (1989), and music superstar Prince died (2016).
- 22 — The first National League baseball game was played (1876), and the first Earth Day was observed (1970).
- 23 — Hank Aaron hit his first major league home run (1954).
- 24 — The Library of Congress was established (1800).
- 25 — The Suez Canal broke ground (1859), the United Nations was organized (1945).
- 26 — The world's worst nuclear disaster occurred at Chernobyl (1986).
- 27 — The first Social Security checks were distributed (1937).
- 28 — Boxer Muhammad Ali refused induction into the Army and was stripped of his world title (1967).
- 29 — **The first Roget's Thesaurus was published** (1852), and the zipper was officially patented (1917).
- 30 — The Louisiana Purchase was finalized (1803), the ice cream cone made its debut (1904), Bugs Bunny made his debut (1936), Mr. Potato Head hit toy store shelves (1952), and the Vietnam War ended with the fall of Saigon (1975).



BIRTHDAYS

- 2 — Fairy tale author Hans Christian Anderson (1805), **singer Marvin Gaye** (1939), and actor Dana Carvey (1955).
- 3 — Actors Marlon Brando (1924) and Alec Baldwin (1958), and comedian Eddie Murphy (1961).
- 4 — Author Maya Angelou (1928), and actor Robert Downey Jr. (1965).
- 5 — Actors Spencer Tracy (1900), Bette Davis (1908), and Gregory Peck (1916).
- 6 — Country singer Merle Haggard and actor Billy Dee Williams (1937).
- 7 — **Jazz singer Billie Holiday** (1915), filmmaker Francis Ford Coppola (1939), and actors Jackie Chan (1954) and Russell Crowe (1964).
- 8 — Siddhartha Gautama, founder of Buddhism (563 BC), and former First Lady Betty Ford (1918), and actress Patricia Arquette (1968).
- 9 — Actors W.C. Fields (1879) and Dennis Quaid (1954).
- 10 — Actor Chuck Connors (1921), sportscasters John Madden (1936) and Don Meredith (1938), and actor Steven Seagal (1951).
- 12 — Author Tom Clancy and TV personality David Letterman (1947).
- 13 — President Thomas Jefferson (1743), **Wild West outlaw Butch Cassidy** (1866), and actor Ron Perlman (1950).
- 14 — Country music legend Loretta Lynn (1932), baseball star Pete Rose (1941), and actors Brad Garrett (1960) and Sarah Michelle Gellar (1977).
- 15 — Artist/inventor Leonardo da Vinci (1452), musician Roy Clark (1933), and actor Seth Rogen (1982).
- 16 — Aviator Wilbur Wright (1867), actor Charlie Chaplin (1889), basketball Hall of Famer Kareem Abdul-Jabbar (1947), and football coach Bill Belichick (1952).
- 17 — Football player/commentator Boomer Esiason (1961), and actress Jennifer Garner (1972).
- 18 — Baseball Hall of Famer Catfish Hunter (1946), actor Rick Moranis (1953), and **TV talk host Conan O'Brien** (1963).
- 19 — Actors Dudley Moore (1935), Ashley Judd (1968) and Kate Hudson (1979).
- 20 — Nazi leader Adolf Hitler (1889), singer Luther Vandross (1951), and actress Carmen Electra (1973).
- 21 — Queen Elizabeth II (1926), actors Charles Grodin (1935) and Tony Danza (1951), and actress Andie MacDowell (1958).
- 22 — Actor Jack Nicholson and musician Glen Campbell (1936), and rock star Peter Dinklage (1950).
- 23 — Playwright William Shakespeare (1564), 15th U.S. president James Buchanan (1791), actress Shirley Temple (1928), singer Roy Orbison (1936), and **comedian/actor George Lopez** (1961).
- 24 — Singer/actress Barbara Streisand (1942) and singer Kelly Clarkson (1982).
- 25 — Radio inventor Guglielmo Marconi (1874), jazz singer Ella Fitzgerald (1918), actor Al Pacino (1940), and actress Renee Zellweger (1969).
- 26 — Naturalist John James Audubon (1785), entertainer Carol Burnett (1933), and actor Kevin James (1965).
- 27 — Telegraph inventor Samuel Morse (1791), Civil War general and 18th U.S. president Ulysses S. Grant (1822), baseball Hall of Famer Rogers Hornsby (1896), and voice guy Casey Kasem (1932).
- 28 — 5th U.S. president James Monroe (1758), former Iraqi president Saddam Hussein (1937), and TV personality Jay Leno (1950).
- 29 — Jazz bandleader Duke Ellington (1899), race car legend Dale Earnhardt (1951), comedian Jerry Seinfeld (1954), and actresses Michelle Pfeiffer (1957) and Uma Thurman (1970).
- 30 — Country singer Willie Nelson (1933), **basketball Hall of Famer Isiah Thomas** (1961), and actress Kirsten Dunst (1982).

