



U.S. Department of Energy Office of Project Management

EFCOG Update

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Metrics

- **Multiple phase update**
 - Phase 1 – Re-align 193 metrics in V 3.0 to IP2M METRR (ASU) Z(V 4.0)
 - Review through GL 1 to 10 plus (still work in progress)
 - This means that maturity process groups A and B are ready for Mel to sign (more than 100 metrics)
 - Will provide process A and B to tool vendors in near future (EA, Deltek, Aztech, and others)
 - Daniel Goldsmith now is the secretariat for the configuration control board for metrics (Mel chairs)
 - Example on output



Version 3.0 to Version 4.0

DOE EVMS Metric Specification			
1. EIA-748 Guideline	2. Metric ID	3. Method	4. Frequency
01	01.01.01 (1)	automated/manual	initially & following implementation of customer changes
5. Attribute			
1. Is the product-oriented WBS used for a given project extended to the CA level as a minimum?			
6. Metric Intent			
This test confirms that the WBS is product and deliverable oriented depicting the breakdown of work scope for work authorization, tracking and reporting purposes. The testing compares the products and deliverables in the scope documents (e.g., contract, PEP, PMP, conceptual design report, ...) to the WBS. All elements of the WBS should be defined in an accompanying WBS dictionary. Reference is made to the DOE WBS handbook for this assessment.			
7. Metric Short Description			
WBS dictionary unsubstantiated			
8. Metric			
X =			
1. Products and deliverables in the scope documents (e.g., contract, PEP, PMP, conceptual design report, ...) are not identified in the WBS dictionary. Reference DOE WBS handbook for guidance.			
2. Product-oriented groupings of project scope elements in the WBS dictionary are not organized and subdivided to the total work scope as defined in the scope documents.			
3. The WBS dictionary does not define the products and deliverables to be developed or produced.			
4. The WBS dictionary does not relate elements of work to be accomplished to each other and the overall end product.			
Y = Number of WBS Identifiers in the WBS Index.			
9. Max. Threshold	10. Max. Tolerance	11. Weight	
0		0	
12. Needed Artifacts and Data Elements			
Y artifact(s)	X artifact(s)	FF data elements	
FF01_(WBS)	scope documents (e.g., contract, PEP, PMP, conceptual design report, ...)	FF01_(WBS)_ICL_WBS FF01_(WBS)_ICL_title FF01_(WBS)_IE_level FF01_(WBS)_IGL_WBS_type FF01_(WBS)_I_L_WBS_narrative	
13. Assumptions			
FF01_(WBS) identifies all WBS Identifiers in the WBS dictionary. Reference DOE WBS handbook for guidance.			
14. Instructions			
Determine Y items based on the following.			
Count FF01_(WBS)_ICL_WBS items and, if identified, with the following characteristics.			
	Y		
• FF01_(WBS)_ICL_title <listing>	count		
• FF01_(WBS)_I_L_WBS_narrative <listing>	count		
• FF01_(WBS)_IE_level <listing>	count		
• FF01_(WBS)_IGL_WBS_type <listing>	count		
Determine X items, a subset of Y, based on the following.			
Manually count flagged items based on the following operation(s).			
	X		
• 1. Products and deliverables listed in the PEP/PMP (and other scope documents) are not identified in the WBS dictionary.	count		
• 2. Product-oriented groupings of project scope elements in the WBS dictionary are not organized and subdivided to the total work scope as defined in the PEP/PMP (and other scope documents).	count		
• 3. The WBS dictionary does not define the products and deliverables to be developed or produced.			
• 4. The WBS dictionary does not relate elements of work to be accomplished to each other and the overall end product.			
Determine if X or X/Y exceeds the threshold.			
15. NDIA Reference(s)			
Page 4, Management Value: "The WBS is a product-oriented division of project tasks depicting the breakdown of work scope for work authorization, tracking, and reporting purposes that facilitates traceability and provides a control framework for integrated program management."			
16. Revision Block			

DOE EVMS Metric Specification			
1. Process Category	2. Metric ID (new, old)	3. Method	4. Frequency
A	A.01.01 (1) (01.01.01)	automated/manual	initially & following implementation of customer changes
5. Attribute			
Product-Oriented Work Breakdown Structure (WBS)			
6. Metric Intent			
This metric confirms that the WBS is product and deliverable oriented depicting the breakdown of contract work scope/federal directed scope documents for work authorization, tracking, and reporting purposes. The metric compares the products and deliverables in the scope documents to the WBS. All elements of the WBS are defined in an accompanying WBS dictionary, as required. Reference is made to the DOE WBS handbook for this assessment.			
7. Metric Short Description			
WBS dictionary unsubstantiated			
8. Metric			
X =			
1. Products and deliverables listed in the contract work scope/federal directed scope documents are not identified in the WBS dictionary.			
2. Product-oriented groupings of project scope elements in the WBS dictionary are not organized and subdivided to the total work scope as defined in the contract work scope/federal directed scope documents.			
3. The WBS dictionary does not define the products and deliverables to be developed or produced.			
4. The WBS dictionary does not relate elements of work to be accomplished to each other and the overall end product.			
Y = Number of WBS Identifiers in the WBS Index.			
9. Max. Threshold	10. Max. Tolerance	11. Weight	
0		0	
12. Needed Artifacts and Data Elements			
Y artifact(s)	X artifact(s)	FF data elements	
FF01_(WBS)	contract work scope/federal directed scope documents	FF01_(WBS)_ICL_WBS FF01_(WBS)_ICL_title FF01_(WBS)_IE_level FF01_(WBS)_IGL_WBS_type FF01_(WBS)_I_L_WBS_narrative	
13. Assumptions			
FF01_(WBS) identifies all WBS Identifiers in the WBS dictionary. Reference DOE WBS handbook for guidance.			
14. Instructions			
Determine Y items based on the following.			
Count FF01_(WBS)_ICL_WBS items and, if identified, with the following characteristics.			
	Y		
• FF01_(WBS)_ICL_title <listing>	count		
• FF01_(WBS)_I_L_WBS_narrative <listing>	count		
• FF01_(WBS)_IE_level <listing>	count		
• FF01_(WBS)_IGL_WBS_type <listing>	count		
Determine X items, a subset of Y, based on the following.			
Manually count flagged items based on the following operation(s).			
	X		
• 1. Products and deliverables listed in the contract work scope/federal directed scope documents are not identified in the WBS dictionary.	count		
• 2. Product-oriented groupings of project scope elements in the WBS dictionary are not organized and subdivided to the total work scope as defined in the contract work scope/federal directed scope documents.	count		
• 3. The WBS dictionary does not define the products and deliverables to be developed or produced.			
• 4. The WBS dictionary does not relate elements of work to be accomplished to each other and the overall end product.			
Determine if X or X/Y exceeds the threshold.			
15. NDIA Reference(s)			
Page 4, Management Value: "The WBS is a product-oriented division of project tasks depicting the breakdown of work scope for work authorization, tracking, and reporting purposes that facilitates traceability and provides a control framework for integrated program management."			
16. Revision Block			
V04.00 Updated for release. Sections 1,5,12, 14.			
2021-09-17 DRAFT DRAFT			
Metric ID: A.01.01			
page 1 of 274			



Phase 1 to 2

- **Phase 1 target to be rolled out this fall**
- **Phase 2 Starts after Phase 1**
- **PM-30 to look at a more in-depth at each Metric with a look towards**
 - Opportunity for Primary / Secondary metrics
 - Look at what multiple flags indicated

(Daniel – comments?)



PARS Update

- **Moving PARS from SharePoint based tool Azure in November 2021**
- **Similar look and feel**
- **Faster tool**
- **Improved tools**
- **Benchmarking Module**
- **Announcements with enhancements to start in October**
- **DMS updates / Audit tools**
- **SSRS to Power BI – improved reporting where outside Empower**
- **User guide by event (CD, BCP, etc) / Workflows Assists**
- **Add ASU developed software for IP2M METRR**
- **Self-surveillance – add manual and notes to Empower in PARS**
 - First sites working to do this now



PARS Training

- **Thanks to those who tested basic and advanced courses**
 - 395 comments in basic course
 - 273 comments in advanced course
 - Accepted 90% of comments
 - Basic course – Mid October on Learning Nucleus LMS for both Federal and Contractor users
 - Advanced course Mid November on Learning Nucleus LMS for both Federal and Contractor users (has pre-req)
- **EPA SOP Update to follow roll out of updated PARS**



Data Integrity and Quality vs DQI

- **43 projects uploading – more adding**
- **1/3, 1/3, 1/3**
- **Errors between Cost and Schedule Tools to Flat Files**
- **Contractor vs project level review**
- **Moving to PARS to improve the validation tool currently in place**
- **Provide feedback to all users**
- **Support updates to review process – agree that data is good in government reporting**



Questions/Discussion