



EFCOG PDWG FY23 PM-30 Update

Melvin Frank

Melvin.Frank@hq.doe.gov

Office of Project Controls & Policy (PM-30)

Office of Project Management (PM)

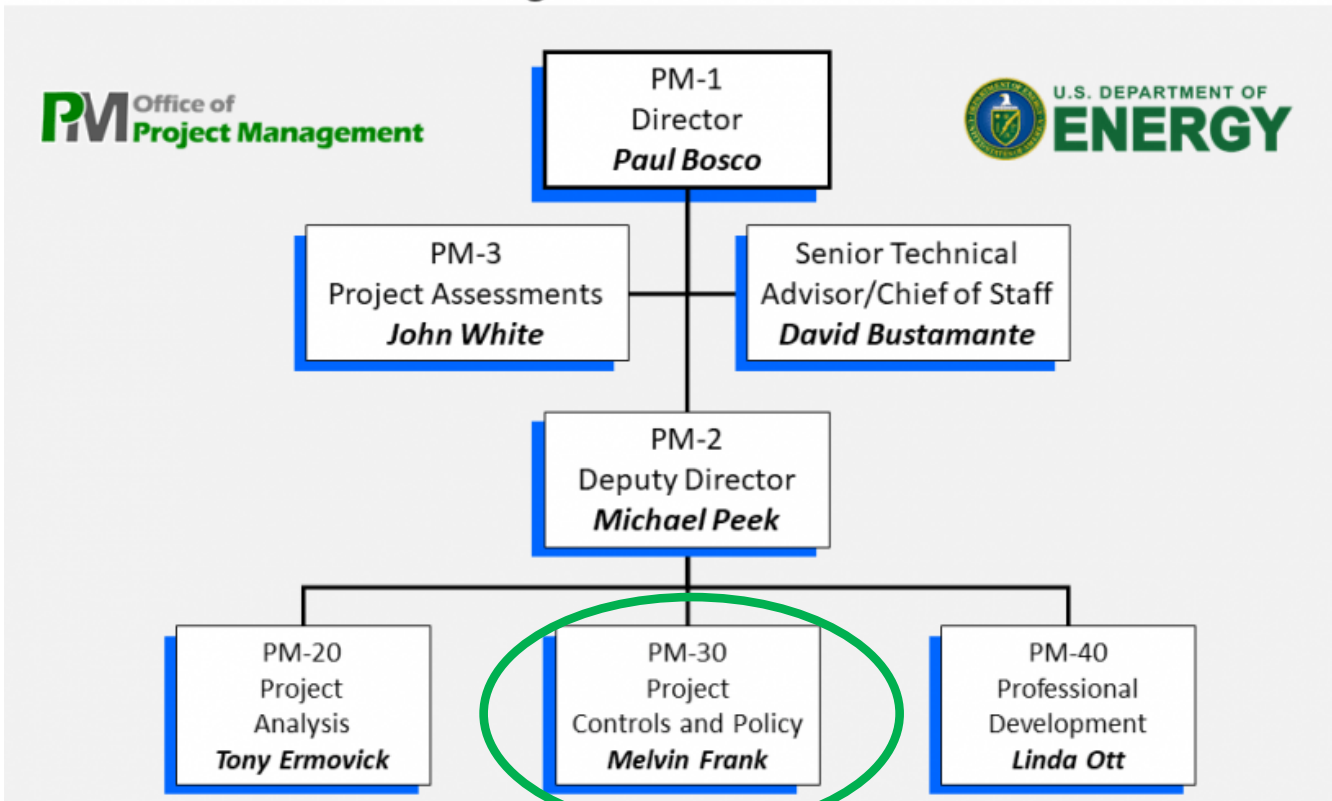
January 31, 2023



DOE PM-30 – Who We Are

OFFICE OF PROJECT MANAGEMENT (PM)

Organization Chart



Effective: April 7, 2022

Compliance

Carney, Kevin
 Goldsmith, Daniel
 Loop, Robert
 Taliaferro, Matthew
 Kester, David (CONTR)
 Young, Amber (CONTR)

Performance

West, Matthew
 Kong, Brian
 Amin, Dipali (CONTR)
 Nye, Thomas (CONTR)
 Ogrodnik, Robert (CONTR)

Policy

Premaza, Victoria
 Pulido, Erika (CONTR)

+1 open FTE

PARS

Richardson, Garrett
 Haseler, Craig (CONTR)
 Mann, Wilson (CONTR)
 Burgess, Adam (CONTR)
 Coty, Christopher (CONTR)
 Jaeger, Julianne (CONTR)
 Mondo, Louisa (CONTR)
 Novicio, Ray (CONTR)



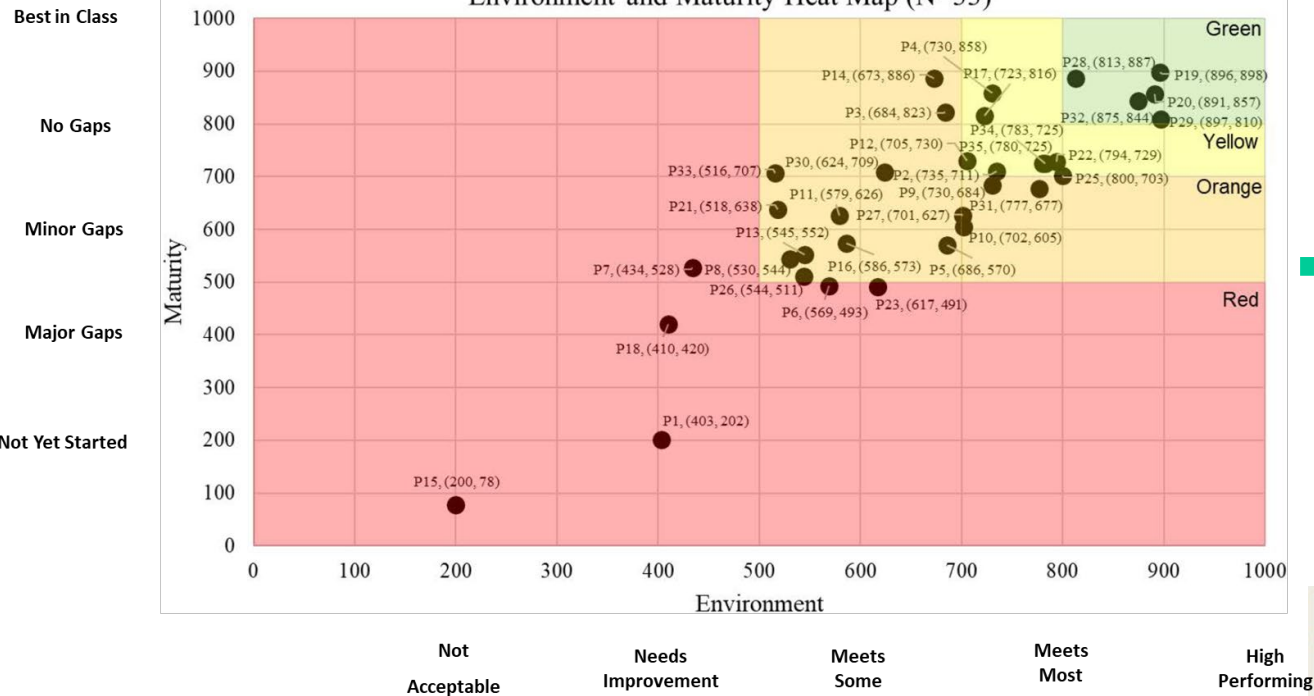
Topics

- **PARS** (Zac to discuss)
- **IP2M METRR**
- **Compliance Reviews**
- **Policy/Order/Guides**
- **IMS**
- **IBR**
- **PM Workshop**



ASU EVMS Research Study

Environment and Maturity Heat Map (N=33)



**Results Oriented
vice
Compliance Centric**

	Coefficient <i>r</i>	
	Positive	Negative
Strong	1 to 0.8	-0.8 to -1
Moderate	0.8 to 0.5	-0.5 to -0.8
Weak	0.5 to 0.3	-0.3 to -0.5
No Correlation	0.3 to 0	0 to -0.3

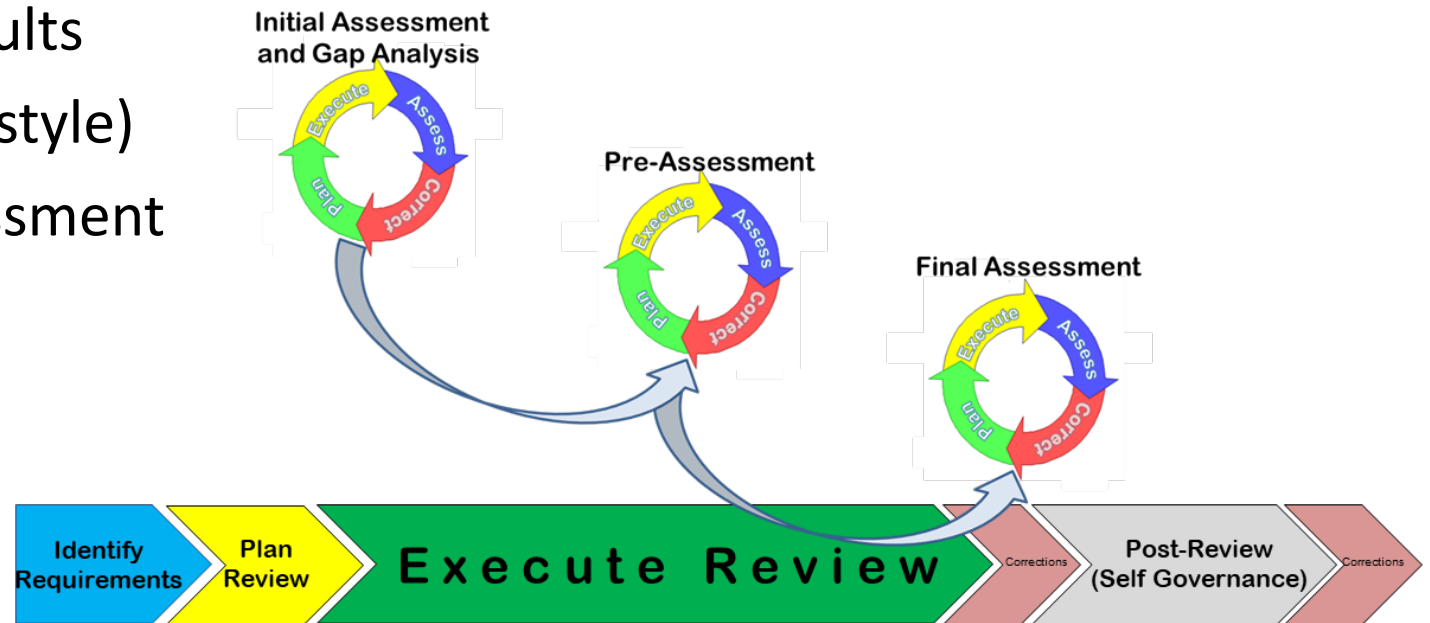


GREEN (>800)		YELLOW (700-799)	
N:	5	N:	7
Mean Cost Growth:	-0.3%	Mean Cost Growth:	+13.7%
Mean Schedule Growth:	-5.9%	Mean Schedule Growth:	+3.8%
ORANGE (500-699)		RED (<500)	
N:	15	N:	6
Mean Cost Growth:	+48.2%	Mean Cost Growth:	+92.3%
Mean Schedule Growth:	+26.9%	Mean Schedule Growth:	+24.3%



Further Refine Compliance Review Process

- Review charter
- Collaborative review of metrics to identify gaps
- Identify high and low-risk attributes/metrics
- Leverage self-governance results
- Round-table discussions (IBR style)
- Facilitated environment assessment
 - contractor team
 - leadership
 - practitioners
 - customer team
 - review team
- Document gaps and non-compliances





FY2023 Planned Compliance Reviews

- **Consolidated Nuclear Security (CNS), LLC**
 - Pantex, Dec 2022
 - Y-12/UPF, March 2023EVMS Implementation Review
EVMS Surveillance Review
- **Savannah River Mission Completion (SRMC)**
 - Savannah River Site (SRS) June 2023EVMS Certification Review*
- **Triad (ASD, LAP4-30Base, TLW)**
 - Los Alamos National Lab+ (LANL) August 2023EVMS Implementation Review
- **Savannah River Nuclear Solutions (SRNS)**
 - Savannah River Site (SRS) November 2023EVMS Certification Review
- **Tularosa Basin Range Services (TBRS)**
 - Waste Isolation Pilot Plant (WIPP) late FY23/early FY24EVMS Certification Review*
- **Idaho Environmental Coalition (IEC), LLC**
 - Idaho National Laboratory FY2024EVMS Certification Review



DOE O 413.3B

Change 7: Fast Track revision path as defined in DOE Order 251.ID

- DRB Review ongoing to Feb 6
 - Update requirements for corrective action plans (S-2 memo 8/18/2022)
 - Update thresholds for construction design and minor construction (NDAA FY2022)
 - Incorporate Climate Adaptation, Resilience and Sustainability requirements (S-2 memo 4/5/2022)
 - Incorporate project management lessons learned requirements (S-2 memo 9/18/2020)

DOE O 413.3B Appendix E and...:

- Efficient tailoring for low-risk (non-nuclear, commercial-type) projects - \$30M - \$100M
 - Considers project size, complexity, cost, and risks
 - Differ from technically challenging population of most DOE capital asset projects
 - Tailoring examples include:
 - Combined Critical Decisions (0/1, 2/3)
 - CD-4 consistent with BOD
 - Consolidation of required documentation in PEP
 - Push PME authority to field/site manager



413 Guides

- **Updates In Progress**

- DOE G 413.3-12, Front-End Planning & Project Definition Rating Index (PDRI)
- DOE G 413.3-2X, Project Scope (**New Guide**)
- DOE G 413.3-20, Change Control Management (OTB/OTS)
- DOE G 413.3-4B, Technology Readiness Assessments
- DOE G 413.3-2X, Project Management Funding (**New Guide**)

- **Planned Updates**

- DOE G 413.3-21B, Cost Estimating Guide
- DOE G 413.3-7B, Risk Management
- DOE G 413.3-5B, Performance Baseline
- DOE G 413.3-6C, High Performance Sustainable Building



Integrated Master Schedule (IMS)

- **Project Controls Working Group 4 current effort**
 - Project / Subproject setup and IMS organization (inclusive of scope, WBS and PARS upload)
- **Discrete Activities masquerading as Other Than**
 - SVT / Indirect / ZBA / LOE
 - Conflicts between Certified Business Systems (CAS and EIA-748)
 - Minimizes EVMS value proposition
 - Cost and Schedule Disintegration
 - Inaccurate current status
 - Non-Credible PMB and EACs
 - LimitsL: insight of issues/risks / ability for corrective action / making informed decisions
 - REMEDY:
 - 1) Discrete; 2) Discrete; 3) Discrete - with direct budget and cost
 - Collaborate with EFCOG to find optimal compliance options (if any)



Integrated Baseline Reviews (IBR)

- **Facilitated IBR Process**
 - Not a compliance review
 - Thorough PMB evaluation
 - Verify technical content and realism of performance budgets, resources, and schedules
 - Provide mutual understanding of inherent risks in PMB, management control systems, and plan to handle risks.
 - Confirm EVMS used to organize, plan, schedule, budget, manage, control
- **Develop new Policy and Guidance**



Closing Thoughts...

- **IP2M METRR is the New Paradigm**
- **Continued PM-30 and EFCOG Collaboration**
- **April 11-13, 2023 - Project Management Workshop**



PM Workshop Day 3 Agenda (DRAFT)

Thursday, April 13 - Project Controls Session

Time	Topic	Speaker(s)
8:00 - 8:05	Welcoming Remarks	Mel Frank
8:05 - 8:20	Opening Remarks	Paul Bosco
8:20 – 9:00	PM-30 Accomplishments and Initiatives	Mel Frank
9:00 – 9:45	IP2M METRR Implementation and Lessons Learned	PM-30 Carney/Kester
9:45-10:00	Break	
10:00 – 10:45	PARS: Data Quality, Metrics and Analytics	PM-30 West/Goldsmith
10:45 - 11:30	EFCOG – Self-Governance: The Secret Sauce	EFCOG - Triad/Marbourg
11:30 – 11:50	Open Mic - Q&A (questions also collected in advance)	Mel Frank
11:50 – 12:00	Wrap-up	Paul Bosco
12:00	Lunch Break	



Questions? Discussion...

