**EFCOG Project Controls Subgroup Agenda**

April 10, 2023 10:00 AM – 5:30 PM EST

Forrestal Building Conference Room - 1E245

Welcome, Roll Call Lisa Cazalet

Introduced people in the room and on the Webex: Attendee List is at the end of the notes section

Introductory Comments Mel Frank

New Hire: Kevin Carney hired to lead Policy Team - 4 yrs. DCMA, MN hub, prior to that Army Corps

DOE PM 30 Updates Mel Frank

Key Items discussed: IP2M METRR, Compliance Reviews, DOE 413.3b Order, Guides, IMS, Indirect Budget/Cost Management, OTB/OTS; slides attached

* IP2M METRR
  + Study extended, previously looked at completed projects
    - Developed a nice graphic demonstrating the correlation between enviro and maturity
    - WED more detailed briefing
    - Want to get completed information on projects
      * Are there completed projects that have relevant knowledge on the project?
  + 28 projects where FPDs are still active today
    - Effort will be made to reach out to those FPDs
  + Would like to get 60-70 projects into the database
  + Actions:
    - Anyone interested in participating, contact Mel or Mounir
    - Anyone interested, contact Zac to use the tool
  + Tailoring
    - EVMS versus Alternative Project Controls
      * Need more detailed guidance on Alternative Project Controls
* Upcoming Reviews
  + Consolidated Nuclear Security (CNS), LLC EVMS Implementation Review
    - Pantex, 1st Qtr. FY2023
  + Consolidated Nuclear Security (CNS), LLC EVMS Surveillance Review
    - Y-12 National Security Site 2nd Qtr. FY2023
  + Savannah River Mission Completion (SRMC) EVMS Certification Review\*
    - Savannah River Site (SRS) 3rd Qtr. FY2023
  + ASD (Advanced Sources and Detectors), Triad EVMS Implementation Review
    - Los Alamos Nuclear Lab (LANL) 3rd Qtr. FY2023
  + Savannah River Nuclear Solutions (SRNS) EVMS Certification Review
    - Savannah River Site (SRS) 1st Qtr.FY2024
  + SIMCO Waste Isolation Pilot Plant (WIPP) EVMS Certification Review\*
    - 2023/24
  + Idaho Environmental Coalition (IEC), LLC EVMS Certification Review
    - Idaho National Laboratory 2024
  + ACTION: If you want to be on a review team, reach out to Mel
    - Encourage more Federal support
    - Nominate people on your team
* 413.3 Policy and Guidance: Change 7
  + 4 different policy memos that have been signed in the past few years
  + Mel is resolving 150 comments
  + Backlog of additional comments
* Appendix E
  + How to better tailor
  + NNSA is already implanting what is going to be in Appendix E
    - If you have a small, non-complex commercial type project, please consider submitting for consideration
  + 413 already addresses tailoring
    - Quite often there is over implementation by the sites
    - See Section 4, Section 27
  + Purpose: Standard tailoring approach for a certain subset of projects
    - One approach provided
    - Can still decide on alternate tailoring
      * Get approval
      * Described in PEP
    - Non-nuclear, non-complex, commercial-type
      * Not new critical technologies
      * Not part of a phased set of projects or not require integration with other projects
  + Applicability: between 30M up to 100M
    - Has not yet achieved CD-0
    - Does not apply to non-construction
  + Combined Critical Decisions
    - CD-4 is when you hit beneficial occupancy
      * Letter to FPD, we have achieved beneficial occupancy and meet the requirements
      * Less cumbersome approach to CD-4
  + Objectives
    - FPD should strive for a duration between CD-1 to CD-4 in less than 5 years
    - At least 85% FFP subcontracts
    - Push to the site level as the PME
    - Do not need to go to HQ
    - Should be simple enough
    - Several pilots in NNSA
  + Mel stated that it can be a level down
* IRSASOP
  + ICE/ICR
  + Schedule Health
  + Incorporates many of the same schedule health metrics as in an EVMS review
  + Look at a consistence basis within a schedule review
  + Aligned with 10 BP GAO Schedule Guide
  + Acumen Fuse template are available
    - A couple for EVMS
    - One for IRSASOP
    - Currently doing alignments between the template
    - Basically same pot of metrics repackaged for different purposes
    - Mainly for ICE/EIR
    - Same metrics as for compliance but repackaged under GAO
    - Used for different reviews
    - PM Methodology
    - One set of measurements
  + Acumen Risk
    - During EIR the Assessment team run their own
      * Depending on the appetite, 85P, 90P, 95P confidence level
      * Would like to see if you are moving towards it here
    - Mel: Incremental step, Victoria Premaza, comparative analysis of risk tools out there, and entering risk into this process
    - Zac: We use Acumen Risk & Fuse, EM, CBC Risk off Acumen
      * Many Fed teams use Acumen, field uses PRA, Safran support contractors
      * Our tool is Acumen Risk
    - Zac: We are writing a standard SOP, will be out soon
    - Mel: Victoria will be leading that in PM 30
  + ACTION: Let Lisa know if you have interest in working on Risk subgroup
  + Mel: Sam Stein comes to mind as prior risk
  + Greg: Josh Wargo, NRA Associates, local DC contractor
  + Make PEP the primary document
  + Briefed Appendix E at the Waste Management Symposium, 12 people in attendance
* Discussed Issues with Non-Resource Loaded Activities
  + ZBAs, SVT (I)s, ETC
  + MF: I want to find a resolution to this; we’ve had discussion with NA-MB-63
    - Need to get the right people in the room and find a true solution to this
  + Patrick M: DOD does not test for resource loaded schedule
    - If in SD use the schedule to resource load and time phase, still should have the requirement to resource load
    - Slight different between DOE and DOD on that
  + MF: As part of the IP2M METRR discussions have reviewed that
  + MF: We have made allowance for a limited amount of ZBA
  + Rob Stern: Need to be tracking indirect, but don’t need to be using EV to track indirects
    - Not able to measure performance
  + LC: Summit with NA-MB-63
    - What is your intent to solve the issue
  + MF: After the workshop, Paul Bosco, Keith Hamilton, Bethany Belice will discuss with respect to UPF
    - There may be some cases when it may be valid
    - Procurement is an indirect function, there should be allowance for small fragments of procurement, maybe
    - I am ok to having a working group, need the finance people in the room
    - If these are going to be in there, what are the alternative measures to be put into place to ensure we don’t lose management steps, to get out of the EV system what I need
  + LC: You will sponsor us having a working group, federal, NA-MB-62, PM
  + MF: And other NA programs

PARS Updates (Slides Attached) Zac West

EVMS Governance Metrics (Slides Attached) Fluor-BWXT

Community of Practice (FPDs, COs, Field Support) John Clayton

* OTB/OTS (Slides Attached)

Schedule Margin (Slides Attached) Doug Marbourg

Management Reserve (Discussion about allowable uses) Lisa

* What does the M & O do when they receive direction to use or not use MR from CO that conflicts with their certified EVM-SD?
* We need alignment

Indirect Cost Variance Analysis Roles & Responsibilities Discussion (Slides Attached) Paul Tackett

Project Controls Working Group Plan Updates

* Project/Subproject Scheduling (Slides Attached) Roy Wright/Brian Kong
* EVMS Tailoring and Scalability Paul Tackett/Kevin Carney
  + Path Forward: Collaborate with NDIA to incorporate DOE objectives into existing NDIA scalability guide; prepare standalone DOE “issuance TBD”; hybrid approach (smaller evolution from white paper, point to other existing documents rather than incorporating content)
  + If interested in participating contact Paul/Kevin
* WBS Best Practices Patrick Milliken/Matthew Taliaferro
  + Focus on some areas product-oriented
    - The what not the who or why, not the resources
    - These are the outputs not the inputs
  + Project Services
    - Area of interest
    - Has to be incorporated within the WBS
    - Common elements need to be peppered through
  + Do I have another leg, how to incorporate into other legs
  + How detailed does it have to be?
  + Construction, build a facility
  + Best Practices, 8/80, go down to level where are between 8-80 hrs = WP level
  + Level at least need to assign responsibility with a control account
* Coding
  + To allow for tracing between systems
* Tracing between requirements, BOE, schedule, budgets, risk mgmt system
* Requirements define the qualities of the what you are delivering, not just the what you are delivering
* Noun when describing an element
* Project Manager cannot sit in an office and doe the WBS by themselves
  + Kick-off meeting
  + Guide, charter
* Make graphical representation
* Timely with Scope Definition coming out DOE Scope Guide
  + Leverage what start to learn
* WBS kicks off the entire backbone of the integrated system
* DOE Data Tests/Metrics Dan Goldsmith
  + 96 comments
  + Worked about 60 complete
  + Most will be in v5

EVMS Tools Best Practices Updates/Discussions Andrea Gilstrap/Zac West

* COBRA Update Dan Demangos
  + July 2023 – v 8.5 (will include the PARS Export Wizard)
* Oracle Update Steve Smith

* Empower Update Brooke Boswell
  + Empower Users Conference May 22-25th

Next Meeting information EUG May 22, 2023

Annual EFCOG June 20, 2023

Close Out Lisa Cazalet/ Mel Frank

Attendees in person or online:

