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# DOE Project Management News

*Acquiring Minds Want to Know*



## November 2016 Edition

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## Director's Corner



Paul Bosco,  
Director of the  
Office of Project  
Management  
Oversight and  
Assessments (PM)

Project management is undoubtedly a planning function, and we're all planners in one way or another. Paraphrasing General Eisenhower's famous quote on planning, the act of planning is more valuable than the plan it produces. Early front-end planning creates insight on the management, technical, cost, schedule, risk, and safety challenges we face in delivering some of the world's most complex capital asset projects. In the Department's 2008 [Root Cause Analysis of Contract and Project Management performance](#), the number one issue contributing to poor contract and project management was failure to adequately perform front-end planning. With your hard work over the past eight years, we have come a long way toward addressing that issue. Your thorough scope definition outlined in project execution plans, work breakdown structures, detailed cost estimates, and well-constructed schedules are all part of the front-end planning that supports building better baselines. Risk analysis before the project starts informs our contingency requirements. Project controls throughout the project tell us how we're doing against established baselines. Independent project peer reviews help us assess project health and cross feed your experience and bright ideas to solve our most challenging problems. These are all vital planning activities that require a variety of unique skills. As planners and project managers, you're doing admirable work to address the issues identified in 2008; however, we still have some work to do. This month, we continue to highlight the tools of the trade that you've help develop. It is my hope that these articles will lead you to expand your own planning expertise, and elicit your thoughts for continued improvement. Keep planning!

Sincerely,

*Paul Bosco*



## Accountabilities with the Performance Baseline and Performance Measurement Baseline

by Brian Kong, Office of Project Assessments (PM-10)

In our journey for continued improvement, there is renewed emphasis on planning and establishing a Performance Baseline (PB) that captures the project's scope, schedule, and cost. And while many within the project management community use the generic term "baseline" in multiple contexts, it is important to note and understand the distinction between the Performance Baseline and the Performance Measurement Baseline.

The Performance Baseline (PB) is managed by the federal staff and represents the Total Project Cost (TPC) of the project, inclusive of DOE's contingency and other direct costs (ODC). The Federal Project Director (FPD) is accountable for executing the project within the PB inclusive of key performance, scope, cost and schedule parameters.

The Performance Measurement Baseline (PMB) is a subset of the contract price (CP), which is composed of the PMB, Management Reserve (MR) and Profit/Fee. The CP is a subset of the PB. The PMB, together with MR constitute the Contract Budget Base (CBB) which is managed by the contractor. The contractor's project manager is accountable for executing the project scope of work as defined in the contract, within the CBB (PMB and MR).

The project's scope of work must be completed by the contract completion date [= PMB's planned completion date + schedule reserve] and within the CBB [= PMB + MR]. However, if there are changes such as authorized unpriced work (AUW) or overruns, the CBB may no longer represent the contract value. Such changes should be expeditiously definitized in both project space and contract space; otherwise, the project and the contract will diverge, diverting resources to reactively, rather than proactively manage risks, and increasing the difficulty in maintaining the project and contract alignment.

As previously mentioned, the FPD is accountable for executing the project within approved PB. The project scope must be completed by: (1) critical decision 4 (CD-4) [= contract completion date + DOE schedule contingency]; and (2) within the total project cost (TPC). Again, any changes to the PB need to be expeditiously definitized for similar reasons.

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# Accountabilities with the Performance Baseline and Performance Measurement Baseline

by Brian Kong, Office of Project Assessments (PM-10)

While the difference between the PB and the PMB may be subtle, both have measurement aspects, but at different levels that are critical to ensuring the project's success. For example, the project team should objectively quantify the costs to complete the work to obtain the estimate-at-completion (EAC), factoring performance and an integrated baseline risk analysis.

The contractor is responsible for reporting the EAC for the PMB, and the FPD is responsible for reporting the EAC for the PB.

Front-end-planning (FEP) is one invaluable means to minimize unfavorable variances, which is a Construction Industry Institute (CII) best practice. This maximizes the potential for a successful project.

Fortunately, many projects have implemented FEP on their projects before proposing and establishing the PMB and PB, and they are reaping the benefits. For these projects, variances with cost and schedule, as well as scope, are minimal and performance is favorable.

Our journey for continuous improvement needs to ensure that the contractor and federal staff are each accountable for their respective but integrated baselines (PMB and PB). In planning and establishing these integrated baselines, each party should implement a thorough FEP process, a proven best practice for maximizing the potential for project success.

Review these EVMS snippets, conveniently hyperlinked, to learn more about topics discussed in this article.

[4.1 Over Target Baseline \(OTB\) and Over Target Schedule \(OTS\) Implantations](#)

[4.4 Undistributed Budget](#)

[4.5 Authorized Unpriced Work](#)

Continued on next page...

**NEW!**

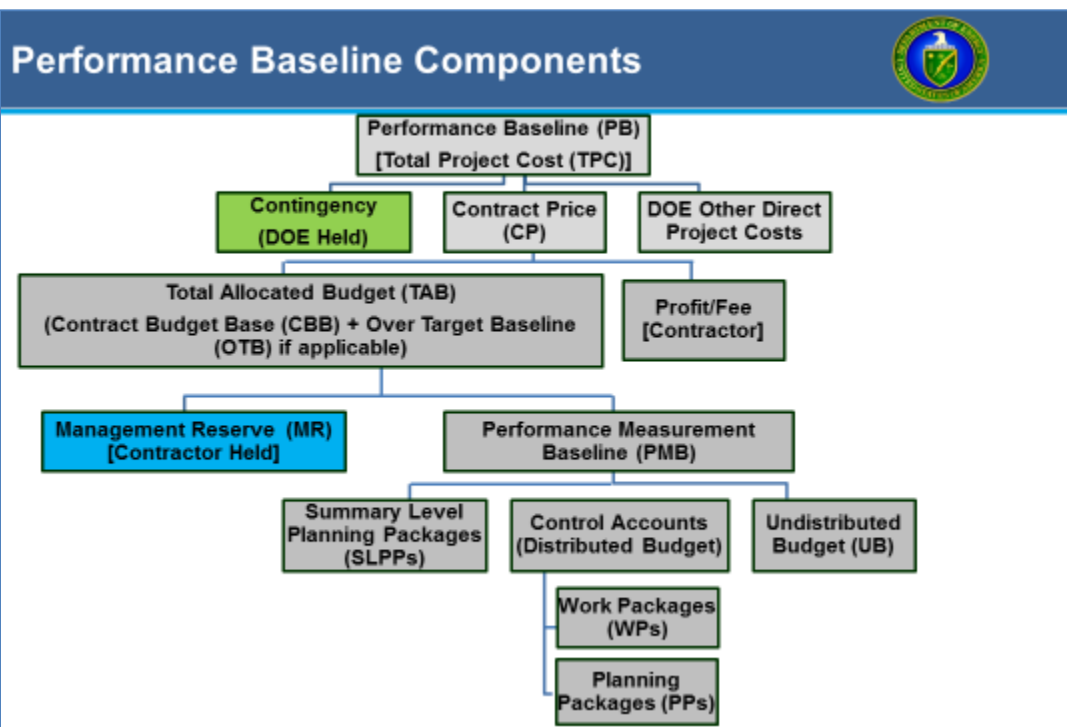
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# Contingency and Management Reserve

**Pete Bako, Office of Project Assessments (PM-10)**

Management reserve (MR) and contingency and are two terms that are often misunderstood in project and contract management, creating confusion about the proper applicability and accountability of each. In order to alleviate confusion and develop a common understanding, we first need to understand how MR and contingency fit within the Performance Baseline (PB) components.

Looking at the Performance Baseline (PB) components chart, we can see that the PB, which represents the Total Project Cost (TPC) for DOE, is broken down into three elements: DOE-held contingency, the contract price issued to the contractor, and DOE-held reserves for other direct project costs.



*Continued on next page...*



# Contingency and Management Reserve

**Pete Bako, Office of Project Assessments (PM-10)**

The Total Allocated Budget (TAB) we can see on the chart, is part of the contract price that is managed by the contractor and is based on the negotiated contract target cost. Unless an Over Target Baseline (OTB) has been approved, the TAB equals the Contract Budget Base (CBB). The contractor initially places the entire CBB in Undistributed Budget (UB), which is part of the performance measurement baseline (PMB). The UB is then distributed to the Control Accounts, Summary Level Planning Packages, and MR.

With a basic understanding of how it fits into the PB, we can now discuss MR, which is an amount of the total budget set aside by the contractor from the TAB for management control purposes. The MR amount is commonly based on the risks associated with each control account. It is part of the contractor's budget, and they're responsible for managing it wisely over the life of the project. MR is used to cover growth within the currently authorized scope, rate changes, and other project risks. It may not be used to offset previously accumulated overruns or underruns. MR should be tracked closely to ensure it's only being applied to future tasks. Lastly, MR is expected to be time-phased during the life of the project and should not be replenished with DOE contingency.

Now, let's switch gears and talk about contingency. Contingency is a reserve owned by the project owner, in this case DOE. It is held outside the project scope, schedule, and budget that have already been provided to the contractor via the contract. The amount of contingency is usually derived from an evaluation of identified risks. While contingency is derived from the risk register within the defined project scope, the budget may be used to cover other events not known or included when the risk analysis was performed. DOE uses contingency to pay for any changes or additional project scope, and should the contractor incur cost overruns, contingency may be available to cover those allowable, actual costs.

Not clearly understanding the differences between MR and contingency has frequently led to non-standard practices, misconceptions, and misapplication of the two terms. While there is much more information available on the proper use and application of both MR and contingency, the information presented here should give the reader a basic understanding and consistent approach for management reserve and contingency. To learn more, check out [EVMS Training Snippet 4.3, Management Reserve Versus Contingency](#) conveniently hyperlinked here.

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## PM EVM Roadside Assists Coming Your Way

**Melvin Frank, Project Management Policy and Systems (PM-30)**

*[Click here to see upcoming visits](#)*

Earned Value Management (EVM) Roadside Assist Visits (RSAVs) have been well received! At this point, PM-30 has visited seven sites since January 2016 (Los Alamos, Oak Ridge/Y-12, Savannah River, Portsmouth, West Valley, Carlsbad, and Richland/Office of River Protection). Attendees are encouraged by the open dialogue, clear expectations and information provided by the team.

In August 2016, Office of Project Management Oversight and Assessments (PM) released Version 2.0 of the [DOE Earned Value Management Systems Interpretation Handbook \(EVMSIH\)](#) to assist in the communication of compliance to the EIA-748 Guidelines.

PM-30 is conducting on-site visits to strategic sites using an EVM RSAV format, based on the well-received PARS II and EVMS Road Shows from prior years. This is a CAR-free approach used to assist contractors and gauge the contractor's readiness to be successful in future EVMS reviews. The visit to each site is running one to five days depending on how many different contractors are at a site. While some portions of the visit are conducted at the site level, the PM-30 team will meet with each contractor team individually, including the Project Manager, Project Controls staff, and Control Account Managers (CAMs), along with local DOE Project staff, to discuss specifics relating to a particular contractor's assessment results and questions.

The visits are prioritized based first on those contractors requiring EVMS certification, followed by those contractors in post-certification 'surveillance' mode. The primary focus is on 413.3B applicable sites in EM and NNSA. Additional contractors/sites June be accommodated by request.

If you have not been contacted by PM-30 to schedule this visit, please contact Mr. Melvin Frank (202-586-5519) [Melvin.Frank@hq.doe.gov](mailto:Melvin.Frank@hq.doe.gov); or Susan Wood (202-586-8410) [Susan.Wood@hq.doe.gov](mailto:Susan.Wood@hq.doe.gov) of PM-30.



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## PM EVM Roadside Assists Coming Your Way

Melvin Frank, Project Management Policy and Systems (PM-30)

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### Upcoming PM EVM Roadside Assist Visits



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## Upcoming Training

FY17 Q1

On Demand

Full FY 2017  
Training  
Strategy\*

\* To print the FY 2017  
Training Strategy, print  
only pages 20-23 of this  
document

**Step 1:** Click on a button  
along the top to view all  
training during that  
timeframe

**Step 2:** Click on any course  
to learn more

Classroom Training

Course Name  
X days / XX CLPs

Date  
Location

Online Training

Course Name  
XX CLPs

Date  
Location

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## Upcoming Training

FY17 Q1

On Demand

Full FY 2017  
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### *FY 2017 Quarter 1 Classroom Training*

Managing Contract  
Changes

*4 Days / 32 CLPs*

12/13 – 12/16  
New Orleans, LA SPR

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## Upcoming Training

### Managing Contract Changes

X

PMCDP is offering an instructor-led delivery of the 4-day course, *Managing Contract Changes*, scheduled for December 13-16, 2016 in New Orleans, LA (SPR).

This course aims to better prepare DOE Contracting Officers (COs) and Federal Project Directors (FPDs) to manage project changes on complex construction projects through effective management of contract modifications and change orders.

*Managing Contract Changes* includes discussions of DOE's historical and current contracting environment, authorities for contract modifications, and the various contract provisions and legal doctrines that define and limit the ability for the Government to change contracts. Additionally, the course examines the doctrine of constructive change, potential differences between project management changes and contract changes, and the things DOE senior level contracting and program officials can do to improve the effectiveness of the change management process.

**You will earn 32 continuous learning points for this course. This is a Core course for the Level 1 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

**Register in CHRIS  
CHRIS Code: 002102/0064**

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## Upcoming Training

FY17 Q1

On Demand

Full FY 2017  
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Strategy

### On-Demand Online Training\*

Environmental Laws  
and Regulations

24 CLPs

On-Demand  
OLC

Earned Value  
Management Systems  
(24/7)

24 CLPs

On-Demand  
OLC

Project Management  
Essentials

50 CLPs

On-Demand  
OLC

*\*On-Demand courses are available at any time through DOE's Online Learning Center (OLC).*



## Upcoming Training

X

### Environmental Laws and Regulations

PMCDP hosts on the Online Learning Center (OLC) a Level II Elective Course titled *"Environmental Laws and Regulations."* This online course is intended to give Department of Energy employees an overview and basic working knowledge of pertinent environmental laws and regulations, and how those laws and regulations impact managing projects at DOE. The course identifies the resources to assist DOE staff and managers in the event they are asked to support or manage a project with potential environmental impacts. This course supports DOE employees and the Department in achieving environmental sustainability goals, including reducing energy use, enhancing pollution prevention, and water conservation.

Upon completion of the training, all participants will be able to identify the intent of the major Federal environmental laws, regulations, DOE Orders, Directives and guidance. Participants will also be able to list the detailed processes involved in the implementation of major environmental requirements by the Department of Energy.

This course is comprised of seven modules.

- DOE's Framework for Environmental Compliance
- All About Water
- All About Air
- All About Waste
- All About Clean Up
- Sustainability
- Cultural Considerations

Successful completion of any six modules is required to receive credit for the course. However, a seventh module can be completed for continuous learning points.

### Registration is through the OLC

**You will earn 24 continuous learning points for this course. This is an elective course for the Level II Federal Project Director certification and is available to all DOE employees.**

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## Upcoming Training

### Earned Value Management Systems (24/7)

X

PMCDP hosts on the Online Learning Center (OLC) the Level 1 Core Course titled "*Earned Value Management Systems (24/7)*." This online training is designed for newcomers to gain a solid foundation in earned value management systems (EVMS) or for earned value management (EVM) practitioners interested in enhancing their ability to effectively use performance data and keep up with the latest industry guidelines, government requirements, and EVMS issues. This course covers the five major categories in the EIA-748 Standard for Earned Value Management Systems including:

- Organization
- Planning, Scheduling, and Budgeting
- Accounting Considerations
- Analysis and Management Reports
- Revisions and Data Maintenance

**Registration is through the OLC**

**You will earn 24 continuous learning points for this course. This is a core course for the Level I PMCDP certification for Federal Project Directors and is available to all DOE employees.**



## Upcoming Training

### Project Management Essentials

**X**

PMCDP hosts on the Online Learning Center (OLC) the Level 1 Core Course titled "*Project Management Essentials*." This online training is comprised of 15 individual lessons and introduces employees to a comprehensive set of project management principles. The primary source materials for this course are the Project Management Institute's *Project Management Body of Knowledge*® (sometimes referred to as the PMBOK®), DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*, and the associated guides supporting the Order. Other guides and manuals are referenced throughout the course.

#### Topics include:

- Project framework
- Project initiation including the risk planning process
- Project planning
- Project cost and schedule
- Project execution and procurement
- Project monitoring and controls
- Project closeout

#### Registration is through the OLC

**You will earn 50 continuous learning points for this course, if you complete all 15 lessons. You can also take each lesson individually and earn continuous learning points for each lesson. This is a core course for the Level I PMCDP certification for Federal Project Directors and is available to all DOE employees.**

*Click here to view the  
CLPs for each lesson*



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## Upcoming Training

### Project Management Essentials

**X**

Lesson	CLPs
Lesson 1: PM Framework	3
Lesson 2: Strategic Planning	2
Lesson 3: Project Initiation	2
Lesson 4: Acquisition Strategy	3
Lesson 5: Risk Planning (Part 1- Process Overview)	4
Lesson 5: Risk Planning (Part 2- Initial Risk Planning)	4
Lesson 5: Risk Planning (Part 3- Finalizing the Plan)	4
Lesson 6: Scope	3
Lesson 7: Quality	3
Lesson 8: Schedule	4
Lesson 9: Cost	3
Lesson 10: Project Execution	2
Lesson 11: Procurement	3
Lesson 12: Project Control	4
Lesson 13: Monitoring and Controlling Risk and Quality	2
Lesson 14: Communication and Leadership	2
Lesson 15: Transition/Closeout	2

**KEY:**

Orange Highlight in need of Training Location/POC/Host


No Highlight Hosted and Scheduled

**Ongoing Online Training:**

<i>Earned Value Management Systems (24/7)</i>	<i>Online 24 CLPs</i>	<i>Ongoing</i>	<i>OLC</i>	
<i>Environmental Laws and Regulations</i>	<i>Online 24 CLPs</i>	<i>Ongoing</i>	<i>OLC</i>	
<i>Project Management Essentials</i>	<i>Online 50 CLPs</i>	<i>Ongoing</i>	<i>OLC</i>	
<i>Contracting Officer Representative (CLC 222)</i>	<i>Online 32 CLPs</i>	<i>Ongoing</i>	<i>DAU-Defense Acquisition Agency</i>	<a href="https://faitas.army.mil/Faitas/">https://faitas.army.mil/Faitas/</a>

**Q1 FY 2017:**

Course Title	Length/CLPS	Planned Delivery Timeframe	Location/ Platform	Training Location Point of Contact
Planning for Safety in Project Management CHRIS Code: 001035/0059	28 CLPs	Sept 29-November 3, 2016	NA / Desktop delivery Thurs 1-3pm EDT	Sig Ceaser
Cost and Schedule Estimate and Analysis CHRIS Code: 001044/0028	5 Days / 40 CLPs	October 31- November 4, 2016	Classroom Lexington, KY PPO	Susan Sparks
Negotiation Strategies and Techniques CHRIS Code: 001047/0023	24 CLPs	November 8- December 13, 2016	NA / Desktop delivery Tues 11am-12:30pm EST	Sig Ceaser
Managing Contract Changes CHRIS Code: 002102/0064	4 Days / 32 CLPs	December 13-16, 2016	Classroom New Orleans, LA (SPR)	Claudia Carroll


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## Q2 FY 2017:

Course Title	Length/CLPS	Planned Delivery Timeframe	Location/ Platform	Training Location Point of Contact
Project Management Systems and Practices in DOE CHRIS Code: 001024/0046	60 CLPs	January 19-March 3 10 Sessions (Tue/Thurs 1pm-3pm)	NA / Desktop delivery	Sig Ceasar
Facilitating Conflict Resolution CHRIS Code: 001558/0023	24 CLPs	January 24-Feb 21 5 Sessions (Tue 11am-12:30pm)	NA / Desktop delivery	Sig Ceasar
Capital Planning for DOE O 413.3B CHRIS Code: 002152/0011	2 Days / 16 CLPs	January 25-26	Washington DC/ Forrestal/GH-019	Ruby Giles
Scope Management Baseline Development CHRIS Code: 001036/0026	3 Days / 24 CLPs	January 31-Feb 2	Aiken, SC Building 766-H	Carolyn Price
Leadership through Effective Communication CHRIS Code: 002366/0025	3 Days / 24 CLPs	January 31-Feb 2	Richland, WA Hammer	Robin Whitney
Advanced Earned Value Management CHRIS Code: 002689/0009	3 Days / 24 CLPs	February 14-16	Richland, WA Hammer	Robin Whitney
Acquisition Management for Technical Personnel CHRIS Code: 000145/0045	4 Days / 32 CLPs (or less)	February 28-March 1	Washington DC/ Forrestal 4A-104	Ruby Giles
Cost and Schedule Estimate and Analysis CHRIS Code: 001044/0029	5 Days / 40 CLPs	March 6-10	Richland, WA Hammer	Robin Whitney


## FY2017 PMCDP Training Schedule

Last Update 11/17/2016

Strategic Planning CHRIS Code: 001043/0013	3 Days / 24 CLPs	March 7-9	Aiken, SC Building 766-H	Carolyn Price
Advanced Earned Value Management CHRIS Code: 002689/0010	3 Days / 24 CLPs	March 14-16	Idaho Falls, ID	Tina Wagoner

## Q3 FY 2017:

Course Title	Length/CLPS	Planned Delivery Timeframe	Location/ Platform	POC
Advanced Concepts in PM CHRIS Code: 001023	50 CLPs	April	NA / Desktop delivery	
Project Risk Analysis and Management CHRIS Code: 001033	3.5 Days / 28 CLPs	April	Classroom	
Strategic Planning CHRIS Code: 001043	3 Days / 24 CLPs	April	Classroom	
Federal Budgeting Process in DOE CHRIS Code: 001034	4 Days / 32 CLPs	April	Classroom	
Project Management Simulation CHRIS Code: 001029	5 Days / 40 CLPs	April	NA/Desktop	
Advanced Risk Management CHRIS Code: 001042	4 Days / 28 CLPs	May	Classroom	
Scope Management Baseline Development CHRIS Code: 001036	3 Days / 24 CLPs	May	Classroom	
LEED for New Construction and Existing Buildings CHRIS Code: 001936	2.5 Days / 20 CLPs	May	Classroom	
Systems Engineering CHRIS Code: 001049	3 Days / 24 CLPs	June	Classroom	
Executive Communications CHRIS Code: 001031	3 Days / 24 CLPs	June	Classroom	
Advanced Earned Value Management CHRIS Code: 001042	3 Days / 24 CLPs	June	Classroom	


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# FY2017 PMCDP Training Schedule

Last Update 11/17/2016

Value Management CHRIS Code: 001037	3 Days / 24 CLPs	June	Classroom	
Planning for Safety in Project Management CHRIS Code: 001035	28 CLPs	June	Desktop	
Labor Management CHRIS Code: 001038	3 Days / 24 CLPs	June	Classroom	
Managing Contract Changes CHRIS Code: 002102	4 Days / 32 CLPs	June	Classroom	

## Q4 FY 2017:

Course Title	Length/CLPS	Planned Delivery Timeframe	Location/Platform	POC
Cost and Schedule Estimate and Analysis CHRIS Code: 001044	5 Days / 40 CLPs	July	Classroom	
Capital Planning for DOE O 413.3B CHRIS Code: 002152	16 CLPs	July	Desktop	
Leadership through Effective Communication CHRIS Code: 002366	3 Days / 24 CLPs	July	Classroom	
Federal Budgeting Process in DOE CHRIS Code: 001034	4 Days / 32 CLPs	July	Classroom	
Labor Management CHRIS Code: 001038	3 Days / 24 CLPs	August	Classroom	
Advanced Risk Management CHRIS Code: 001042	4 Days / 28 CLPs	August	Classroom	
Program Management and Portfolio Analysis CHRIS Code: 001025	5 Days / 40 CLPs	August	Classroom	
Executive Communications CHRIS Code: 001031	3 Days / 24 CLPs	August	Classroom	
Managing Contract Changes CHRIS Code: 002102	4 Days / 32 CLPs	September	Classroom	
Performance Based Management Contracting CHRIS Code: 001951	3 Days / 24 CLPs	September	Classroom	

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## Recently Certified

The following certifications were issued in November.

### Federal Project Directors

#### EM

- Noemi Mendez-Sanchez- Level I

#### NNSA

- Everett A. Trollinger- Level IV

**Congratulations to all newly certified members!**

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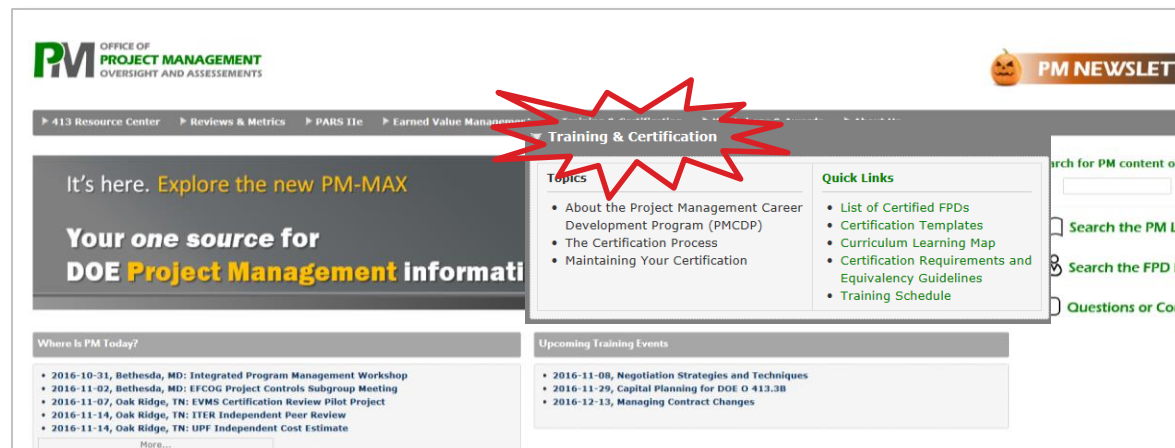
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## FPD Corner: PM-MAX is Ready for Prime Time!

PM-MAX is now live at <https://community.max.gov/x/IICfQg>. You can also get to PM-MAX from the Project Management page on energy.gov under KEY RESOURCES select 



- All things PMCDP have moved to PM-MAX under Training & Certification tab. Looking for information on Federal Project Director (FPD) certification? Take a tour of the Training & Certification tab where you will find that information and quick links to FY17 training schedule, CEG, and a directory of certified FPDs.
- If you don't find something you need, let us know by clicking on the Questions or Comments link to send us an email.

Don't have a MAX ID yet?

Just go to [PM-MAX](#) and select **REGISTER NOW** button at the top of the screen once you are in the MAX site. It's easy!

\*\*\*Bookmark PM-MAX from energy.gov for easier access when you need to get there.\*\*\*

Questions or Feedback on PM-MAX? [PMwebmaster@hq.doe.gov](mailto:PMwebmaster@hq.doe.gov)

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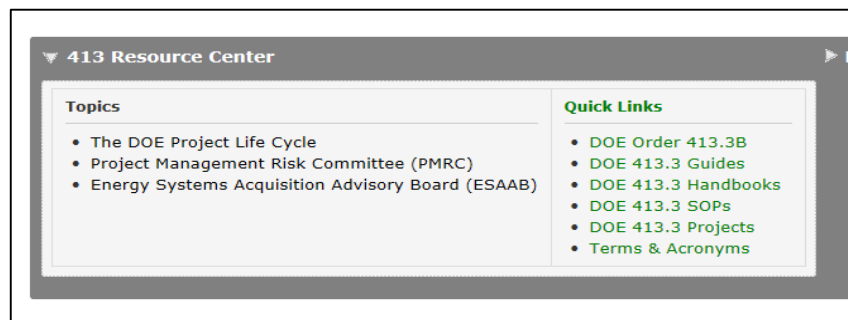
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## FPD Corner: PM-MAX is Ready for Prime Time!

**Directives, Guides, Orders** related to PM are now on PM-MAX **under this tab**



**Login to PM-MAX today and start exploring the resources and information found there. PM-MAX is expanding with information to help DOE's FPDs.**

**Can't find what you need?**

 [Search the PM Library](#)

**There's an FPD Directory!**

 [Search the FPD Directory](#)

**Send an email to the PM-MAX Webmaster.**

 [Questions or Comments?](#)

Download the [FY17 Training Schedule is on PM-MAX](#) under the Training & Certification tab

Register NOW for PMCDP training in [CHRIS](#).

Past editions of the PM Newsletters dating from January 2011 to present are on Powerpedia.

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## How to Direct Your Questions or Comments

For specific information, please contact a Professional Development Division team member:

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If you would like to contribute an article to the Newsletter or have feedback or ideas you'd like to share, contact the Editor, Linda Ott.