



DOE PROJECT MANAGEMENT NEWS

Promoting Project Management Excellence

January 2025



IN THIS ISSUE:

Director's Corner.....	1
Project Data Sheets "101" and CAPDS Initiative.....	2
IP2M METRR Environment Assessment Results Workshop.....	4
JSON Transition.....	5
Call for FPD Volunteers.....	6
Project Management Lessons Learning (PMLL) Training of the Month.....	7
2025 PM Workshop Announcement.....	7
PMCDP Training Schedule.....	8
Contact Us.....	9
Rate Your PM Newsletter Experience.....	9



DIRECTOR'S CORNER

Happy New Year! As we enter 2025, we extend our thanks to Secretary Granholm and the outgoing political appointee team for their leadership and contributions to the Department's many missions. At the same time, we warmly welcome the incoming leadership team. They will soon discover that the Department executes some of the most sophisticated capital asset projects anywhere in the world. I'm sure the Department's entire project management community is prepared to offer its full support to the incoming administration.

Project data sheets (PDSs) are critical tools for justifying and securing funding during budget deliberations in Congress. They provide detailed and transparent information about project scope, costs, schedules, and expected benefits, ensuring that lawmakers have a clear understanding of each project's value and alignment with national security and energy goals. Ultimately, a well-prepared PDS can significantly impact the Department's ability to advance its mission and achieve strategic objectives through successful project execution. See the article on page 2 for more information.



Have you heard about the upcoming Project Assessment and Reporting System switch to JavaScript Object Notation (JSON) for uploading contractor project performance data? The transition, from Microsoft Access database and comma separated value formats to JSON is necessary to enhance network security. It will also improve data integrity and ensure seamless compatibility with common tools utilized by our EVMS software providers, including Oracle P6, Deltek Cobra, Decision Edge WebEVM, and Encore Empower. Learn about the crucial milestones and the collaborative effort required to make this upgrade a success for everyone in the article on page 5.

Under DOE Order 413.3B, an earned value management system (EVMS) is required for all projects with a total project cost greater than \$50M. In accordance with [Federal Acquisition Regulation Subpart 52.234-4](#), a contractor's EVMS will be reviewed for compliance with current version of EIA-748 or as required by the contract. One of the tools utilized by the Office of Project Management (PM) in its compliance review process is

the Integrated Project/Program Management Maturity and Environment Total Risk Rating. The environment assessment is conducted through facilitated sessions with four stakeholder groups: contractor leadership, contractor practitioners, local government customers, and the PM EVMS review team. Valuable insight into the environment assessment process can be found in the article on page 4.

Registration for the 2025 DOE Project Management Workshop is now open for all attendees. Additional information can be found at [2025 Department of Energy Project Management Workshop | Department of Energy](#). And don't forget to check out this month's Project Management Lessons Learned training snippet, *Additional User Capabilities and My OPEX Profile*, on page 7.

Keep Charging!

Paul Bosco

PROJECT DATA SHEETS "101" AND THE CAPITAL ASSET PROJECT DATA SHEET INITIATIVE

Tony Ermovick, Office of Project Analysis (PM-20) and Brian Kong, Office of Project Controls and Policy (PM-30)

Project Data Sheets – "101" and DOE O 413.3B Compliance Issues

Each line-item capital asset project should have a project data sheet (PDS). The PDS is a means to communicate project data with Congress, the Office of Management and Budget (OMB), and Department of Energy (DOE) leadership. It is "a document that contains summary project data and the justification required to include the entire project effort as a part of the Departmental budget. DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*, ([DOE O 413.3B](#)) states that PDSs are submitted to request project engineering design [PED] and construction funds. Specific instructions on the format and content of PDSs are contained in the annual budget call ([DOE O 130.1](#)[A, *Budget Planning, Formulation, Execution and Departmental Performance Management*])" as defined in the Office of Project Management (PM) [lexicon](#) of terms. It is developed after the approval of critical decision (CD)-0, *Approve mission need*, and updated as the project progresses until funding request or reprogramming is no longer needed. It is also updated whenever Congressional notification is required, including notifications required under the provisions of [50 U.S.C. 2744](#), *limits on construction projects*, and [50 U.S.C. 2753](#), *notification of cost overruns for certain DOE projects*.

The PDS includes the following sections: summary, significant changes, schedule and cost history; project scope/key performance parameters (KPPs) and [DOE Project Management News, January 2025](#)

justification; project cost and schedule; related operations and maintenance funding requirements; decontamination & decommissioning (D&D) information; and acquisition approach.

DOE O 413.3B contains provisions on when funds for project design and construction can be requested and expended, as well as specific funding protocols to be followed. Specifically they are as follows and have been updated from prior newsletter articles: *Ensuring Your Capital Asset Project Meets DOE O 413.3B Budgetary Requirements and Best Practices* (October 2020), and *Facilitation for Assessment of Front-End Planning; The DOE Budgetary Process and Project Data Sheets; The DOE Escalation Model; PMCDP Planning and Budgeting Curriculum* (September 2021). These provisions include the DOE O 413.3B Appendix A optional budget request process to request construction funds prior to CD-2 or CD-3A approval.

1. PED funds cannot be expended until CD-1 (or CD-0) is approved (Appendix A, Table 2.1; Under Secretary exemption approval, with project management risk committee (PMRC) endorsement, required for non-compliance).
2. Funds for construction cannot be requested until CD-1 is approved (Appendix A, Paragraph 4.c.(2); Under Secretary exemption approval, with PMRC endorsement, required for non-compliance).

Continued on Page 3.



3. If CD-2 (or CD-3A) is not achieved within two years of a budget request submission to Congress that included a request for construction funds, then approval of any subsequent requests for funds is required by the Chief Executive for Project Management via the energy systems acquisition advisory board (ESAAB). (Appendix A, Paragraph 4.c(2).)
4. If funds for construction are requested prior to CD-2 approval, the default original performance baseline (or total project cost) will be established equivalent to the top end of the range at CD-1 with the initial budget submission (Appendix A, Paragraph 4.c.(2); Under Secretary exemption approval, with PMRC endorsement, required for non-compliance).
5. Project is not requesting funds per the approved CD-2 or baseline change proposal (BCP) funding profile (i.e., requesting less than the approved funding profile) which adversely affects project performance (Appendix A, Table 2.2; Appendix C; Paragraph 20.b; Project Management Executive endorsement required).
6. Project with total estimate cost (TEC) less than \$250M is not fully funded (fiscal year (FY) 2026 OMB Budget Submission Guidance, [OMB Circular A -11 Capital Programming Guide](#), and [DOE Financial Management Handbook](#) Chapter 2.3.

PDSs from the FY2025 Congressional Budget Request (CBR) can be found in [PM-Connect](#).

Capital Asset Project Data Sheets Working Group – An Ongoing Department Initiative

In April 2024 the Office of Budget, under the Office of the Chief Financial Officer, initiated a working group to improve the Department’s annual submissions of project data sheets. The purpose of this effort, known as the *Capital Asset Project Data Sheet (CAPDS) Working Group*, is to “propose changes to the CAPDS template and guiding instructions to the CAPDS template that standardize, shorten, and simplify the CAPDS and to facilitate automation of the CAPDS process.”ⁱ The specific focus of this CAPDS Working Group for the proposed CAPDS includes:

- Keeping the focus as a budgetary formulation and justification document
- Providing the necessary project information to support and defend budget decisions
- Reducing errors, omissions, and inconsistencies
- Making them easier to create and review
- Capturing data that integrates with DOE financial systems

The CAPDS Working Group membership is well represented by all major DOE Programs (to include Program budgetary and headquarters project management subject matter experts) and is comprised of the following, per the table below:

Table 1. CAPDS Working Group Membership

Org.	Voting Org	OMB Ext. Eng.	Office	Primary	Alternate
CFO	X	X	Office of Budget (CF-30) - Chair	Ron Lile	N/A
		X	Office of Budget Formulation (CF-31)	Valerie Alawiye	Tom Fields Will Lahnehan Adam Rehman Fatima Pashaei
		X	Office of Strategic Resources (CF-33)	Dan Cinotti	Nicholas Spelich
NNSA	X	X	Corporate Budget (NA-MB-50)	Donna Gezelle	Lara Sabo
			Office of Infrastructure (NA-90)	Tom Wilson	Jodi Lardner Julie Quintana Tyler Wean
SC	X	X	Office of Budget (SC-OB)	Kathleen Klausing	Elizabeth Jacobs Denise Allen Gurpinder Sohi
			Office of Project Assessment (SC/OPA)	Kurt Fisher	Kin Chao
EM	X	X	Office of Budget (EM-5.111)	Mo Banaei	Brian Foley
			Office of Project Management (EM-5.22)	Rodney Lehman	Dan Melamed
PM	X	X	Office of Project Management (PM)	Tony Ermovick	Brian Kong Kevin Andersen
			Energy Programs, PMSO (PM-3)	John White	
NE			Office of Nuclear Infrastructure Program (NE-3)	Tracey Bishop	Sujita Pierpoint

Continued on Page 4.

The CAPDS Working Group has been meeting regularly at a minimum bi-weekly pace since April, and they have completed an in-depth review of all the proposed sections of the new CAPDS, to include: project identification, status, and history; budget status and milestones; parent project, subproject, and CD-3X information; scope and capability/performance; project schedule history; project cost history; and project financial execution plan.

The draft version of the proposed CAPDS instruction and template are under final review and will be briefed to DOE leadership soon.

If you have any questions on this article, please contact either the authors or your assigned PM-20 Project Analyst.

¹CAPDS Working Group Charter, approved July 7, 2024 (referenced throughout this article)

IP2M METRR ENVIRONMENT ASSESSMENT RESULTS WORKSHOP

Matthew Taliaferro, Office of Project Controls and Policy (PM-30)

Overview

The Office of Project Management (PM) employs the Integrated Project/Program Management (IP2M) Maturity and Environment Total Risk Rating (METRR) as the cornerstone of its earned value management system (EVMS) compliance review process to validate compliance of an EVMS with the industry standard EIA-748. Developed from an Arizona State University (ASU) EVMS academic research study, the IP2M METRR methodology enhances traditional EVMS compliance assessments by considering the beliefs and behaviors of customers, contractors, and stakeholders.

The ASU study highlights a strong positive correlation between the maturity (i.e., compliance with EIA-748) of an EVMS and the project/program environment. It identifies 27 factors across four categories—culture, people, practices, and resources—that influence EVMS implementation. Detailed descriptions of these factors can be found here: [IP2M METRR](#).

Environment Assessment Process

The environment assessment is conducted through facilitated sessions with four stakeholder groups: contractor leadership, contractor practitioners, local government customers, and the PM EVMS review team. Each participant provides anonymous numerical ratings and comments for the 27 factors. The facilitator analyzes these inputs to identify gaps between groups and expectations, which are then detailed in a report.

The large set of comments for the various participants can be used to conduct both a strengths, weaknesses, opportunities, and threats (SWOT) assessment, and to then develop an Ishikawa Fishbone diagram linking

common environment themes as causes for maturity (compliance) issues. Use of a large language model (LLM) artificial intelligence (AI) platform has been demonstrated to be a very useful tool to assist in this type of analysis process.

Results Workshop

The final component of the environment assessment is a two-to-three-day results workshop, ideally held within six to ten weeks of the initial assessment. The workshop aims to help stakeholders reach a mutual understanding of issues and concerns, focusing on the following benefits:

- **Facilitate Communication:** Provides a neutral environment for open dialogue, often with a mediator to clarify issues and promote understanding.
- **Find Common Ground:** Uses guided discussions to help groups discover shared interests and explore solutions that meet everyone's needs.
- **Preserve Relationships:** Emphasizes collaboration over confrontation, helping to maintain or enhance relationships.
- **Empower Project Teams:** Follow-up discussions allow project teams to control outcomes, resulting in more satisfying and durable resolutions.
- **Ownership and Corrective Actions:** Assigns specific actions to appropriate team members, ensuring accountability and timely resolution.

Participants in the results workshop are a subset of those who completed the assessment, with representatives from each stakeholder group.

Continued on Page 5.

For instance, an earlier assessment included 51 participants, while the subsequent workshop had 21 participants.

Workshop Activities

The workshop begins with facilitators presenting the assessment results in detail, covering participant numbers, ratings, comments, and the methods used for analysis. This includes a SWOT analysis to identify strengths, weaknesses, opportunities, and threats based on the ratings and comments.

Participants are then divided into mixed teams for SWOT discussions and presentations, promoting communication and collaboration among different stakeholder groups. These activities continue with case studies and Fishbone Diagram root cause analyses on identified problem areas, such as change control and estimate at completion (EAC) realism.

A survey conducted at the end of the workshop revealed that participants recognized the accuracy of the AI-generated SWOT analysis and Fishbone diagrams, which can help address existing EVMS implementation concerns.

Improvement Actions

The final task is to identify actions the project team (both contractor and customer) can take to improve the operating environment both within and between the contractor and customer organizations, environment and lead to implementation of an effective and efficient EVMS that is geared towards helping deliver a project within scope, schedule, and cost commitments. The improvement actions should also help prevent recurrence of identified gaps.

Stay tuned for more updates on our continuous efforts to enhance project management practices and ensure the successful implementation of EVMS across the Department's projects and programs.



JSON TRANSITION: THE FUTURE IS Now!

*Amber Young, Chris Kurgan,
Office of Project Controls and Policy (PM-30)*

Why the JSON Transition?

Network security and compatibility are paramount to protect data integrity. To ensure robust network security and seamless compatibility with modern operating systems, we will transition from our current Microsoft Access database (MDB) and comma separated value (CSV) formats to JavaScript Object Notation (JSON). Here's why this transition is crucial:

1. **Network Security and Compatibility:** JSON provides the security and compatibility needed to protect our data and integrate smoothly with modern systems. Think of it as upgrading from a flip phone to the latest smartphone—more secure and far more capable.
2. **Developer Support:** MDB and CSV formats are like video home system (VHS) tapes—no one supports them anymore. Deltek has already stopped supporting CSV exports for cost data, making it impossible for contractors to create contractor project performance (CPP) uploads in the latest Cobra versions. Future upgrades will phase out CSV entirely, leading to more bugs and errors if JSON is not adopted. JSON is the new streaming platform—reliable and here to stay.
3. **Vendor Integration:** Our toolset vendors (Oracle P6, Deltek Cobra, Decision Edge WebEVM, Encore Empower) are on board, incorporating DOE specifications to directly export JSON files in the DOE format. This alignment will streamline processes and enhance data integrity.

Failure to transition will leave us with compromised data quality, making it difficult to communicate project status accurately to Department leadership. Nobody wants to be the bearer of bad data, or more problematic, NO data!

Who's Involved?

This transition is a team effort involving the Office of Project Management (PM), federal project directors, project management support offices, contracting officers, and contractors.

Continued on Page 6.

When Do We Need to Do This?

Our goal is to have all targeted contractors transitioned from CSV and MDB to JSON by July 2025. This will ensure we meet the December 2025 cutoff date when project assessment and reporting system (PARS) will no longer be able to accept anything but JSON format data from contractors. Here are some key milestones:

- **Milestone A:** First project phased into production via Empower by January 31, 2025.
- **Milestone B:** By the PM Workshop (April 2025), 33% of projects should be uploading into Empower production, with the remaining 67% confirming their transition progress by uploading JSON into PARs testing data set.

What Defines Success?

JSON transition success requires planning, timing, teamwork, and communication:

1. **Targeted Projects:** Submit CPP monthly uploads in JSON format.
2. **Data Integrity & Quality (DIQ):** Three consecutive months of valid JSON submissions, with no validation trips and no critical DIQ trips. A data trip occurs when the contractor data trips the PM standard metric.
3. **Interim Criteria:** Achieving the milestones mentioned above.
4. **Communication:** Regular meetings with stakeholders will help ensure alignment and progress.

In Summary

By July 2025, we aim to transition all targeted contractors to JSON, enhancing network security, data integrity, and quality. This coordinated effort will ensure we can continue to communicate accurate project status to Departmental leadership. Let's embrace the future and make this transition a success!

For more details, stay tuned for input monthly in meetings, memos, and newsletters.

Note: An artificial intelligence application was used to develop this article, which was reviewed and edited by humans.



Call for FPD Volunteers: Redesigning the FPD Toolbox in PARS

We are excited to announce the upcoming redesign of the federal project directors (FPD) Toolbox in Project Assessment and Reporting System (PARS) and invite the FPD community to participate. We seek FPD volunteers to share their insights, feedback, and ideas to help shape this essential tool. Your input will ensure the new FPD Toolbox is intuitive, impactful, and user-friendly. Join us in this collaborative effort to create a feature that truly meets your needs.

Are you an FPD interested in contributing? Please reach out to Amber Young at amber.young@hq.doe.gov to get involved!

PROJECT MANAGEMENT LESSONS LEARNED (PMLL) TRAINING OF THE MONTH

PMLL Training Snippet 5: Additional User Capabilities and My OPEX Profile

The Department of Energy (DOE) utilizes project management lessons learned in the execution of DOE capital asset projects to improve current and future projects. Lessons learned can be a good work practice or innovative approach that is captured and shared to promote repeat application, or an adverse work practice or experience that is captured and shared to prevent recurrence. Project management lessons learned are collected and shared in the Office of Environment, Health, Safety and Security Lessons Learned Database (DOE OPEXShare).

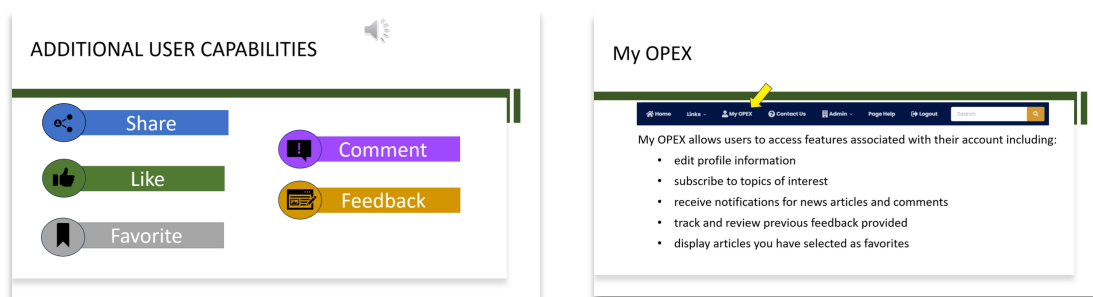
Click here to view this month's Project Management Lessons Learned Training Snippet – [Additional User Capabilities and My OPEX Profile](#)

Summary: This snippet provides information on additional user capabilities, as well as instructions on utilizing the account features in your operating experience (OPEX) profile in DOE OPEXShare.

Continuous Learning Points (CLPs): Reviewing one hour of snippets will equate to one CLP. To receive credit, FPDs can submit a CLP request under the project management career development program (PMCDP) menu in their employee self-service (ESS) account. All others may send an email (indicating the snippets viewed) through their respective supervisor to [DL-PM-40](#) to receive a certificate with the appropriate CLPs awarded.

You can find additional lessons learned training at the link:

<https://community.connect.gov/display/DOEExternal/PM+Lessons+Learned>



Registration is open; click [HERE](#) to register for the Workshop.

2025 DOE Project Management Workshop

Washington DC

April 22-23, 2025*

*** Plus: Optional Project Controls Session April 24, 2025**

**A limited block of rooms (Book Early!) for the PM Workshop has been reserved at the venue:
Hilton Washington DC National Mall the Wharf, 480 L'Enfant Plaza SW, Washington DC.**

Ctrl+Click to follow the hotel link :

[2025 DOE Project Management Workshop - Booking Link Room Reservation](#)

Additional information can be found at [2025 Department of Energy Project Management Workshop](#).



PMCDP FY2025 TRAINING SCHEDULE— QUARTER 2

The training schedule is posted on PM-Connect. Save the direct link to the Project Management Career Development Program training schedule to your favorites: <https://community.connect.gov/x/BgZcQw>

Course Title	LN Code	Dates	CLPs	Details
<u>Scope Management Baseline Development</u>	001036	January 7-10, 2025	24	10:30am-4:30pm ET Webinar Daily
<u>Project Risk Analysis and Management</u>	001033	January 13-17, 2025	28	10:30am-4:30pm ET Webinar Daily
<u>Leadership Through Effective Communication</u>	002366	January 21-23, 2025	24	10:30am-4:30pm ET Webinar Daily
<u>Front-End Planning (FEP): Getting to CD-1</u>	003176	January 28-February 13, 2025	20	1-3pm ET Tuesdays/Thursdays (5 sessions)
<u>Quantitative Risk Analysis</u>	0062022	February 10-13, 2025	20	10am-3pm ET Webinar Daily
<u>Capital Planning for DOE O 413.3B Capital Asset Projects</u>	002152	February 18-20, 2025	16	10:30am-4:30pm ET Webinar Daily
<u>Project Management Systems and Practices</u>	001024	March 3-7, 2025	40	10:30am-4:30pm ET Webinar Daily
<u>Executive Communications</u>	001031	March 11-13, 2025	24	10:30am-4:30pm ET Webinar Daily
<u>Federal Budgeting Process in DOE</u>	001034	March 17-20, 2025	32	10:30am-4:30pm ET Webinar Daily
<u>Managing Performance-Based Contracts</u>	001951	March 25-27, 2025	24	10:30am-4:30pm ET Webinar Daily

If you would like to contribute an article to the Newsletter or want to provide feedback, please contact the Editor at [DL-PM-40](#).



FIND UP-TO-DATE INFORMATION AND RESOURCES ANYTIME!

All PMCDP Course Descriptions and Course Materials can be found in the Course Catalog on



Save the direct link to your favorites: <https://community.connect.gov/x/UAT3Rw>



Or, download the Interactive Curriculum Map: <https://community.connect.gov/x/sQd1Qw>

Have a question, bug or glitch in a PMCDP online course, or want to provide feedback?
Submit your questions through: PMCDPOnlineCourseSupport@hq.doe.gov.

CONTACT US!

The Office of Project Management welcomes your comments on the Department's policies related to DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*. Please report errors, omissions, ambiguities, and contradictions to: PMpolicy@hq.doe.gov.

If you have technical questions about Project Assessment and Reporting System (PARS), such as how to reset your password, please contact the PARS Help Desk at: PARS_Support@Hq.Doe.Gov. And, as always, PARS documentation, frequently asked questions (FAQs) and other helpful information can be found at [Support : PARS Support \(doe.gov\)](mailto:Support:PARS_Support(doe.gov)). The current PARS reporting schedule is located on PM-Connect at the following link: <https://community.connect.gov/x/m4IIY>

Need information to apply for Federal Project Director (FPD) certification? The Certification and Equivalency Guidelines (CEG) can be found here: <https://community.connect.gov/x/IQd1Qw>

Can't put your finger on a document or information you were told is available on PM-Connect? Looking for information on DOE project management? Submit your questions and queries to: PMWebmaster@doe.gov.

TO REACH THE PROFESSIONAL DEVELOPMENT DIVISION (PM-40) TEAM:



Linda Ott — Division Director for Professional Development, PMCDP Program Manager, FPD Certifications Manager, PM Newsletter Editor, Linda.Ott@hq.doe.gov, 240-474-7721

Sigmond Ceaser — PMCDP Certification and Equivalency Guidelines Lead, PMCDP Curriculum and Content Manager, PMCDP Delivery Platform Advisor, Sigmond.Ceaser@hq.doe.gov



Alda Bryant — PMCDP Training Manager, FPD Certification Maintenance Lead, Alda.Bryant@hq.doe.gov

RATE YOUR EXPERIENCE WITH THE PM NEWSLETTER

Your feedback is valuable to us! Please rate your experience with this edition of the newsletter on a scale of **1 to 5** (rating of 5 stars being highly satisfied and 1 star being highly dissatisfied).



[Click here!](#)